

## Recruitment and Retention: How Does Your Association Score?

Recruiting new members and retaining existing members is a challenge for many Associations. It is not uncommon for organizations to experience steady and predictable growth for many years, and have fairly high retention rates.

Yet, sooner or later, for a myriad of reasons, every organization experiences a downturn in member retention.

Before an organization can address its retention challenges, it is important to understand the factors that affect member retention and their impact on the organization's long-term viability. Rate your Organization's Recruitment & Retention Effectiveness to find out how well you are doing, and what you can do to improve your efforts!

**Denise Williams**

**Director, Member Programs & Organization/Region Development**

**American Counseling Association**

[dwilliams@counseling.org](mailto:dwilliams@counseling.org)

**800-347-6647/703-823-9800, x303**

### ACA Organization RECRUITMENT AND RETENTION SCORE CARD

TOTAL POSSIBLE SCORE	YOUR ORGANIZATION SCORE	RECRUITMENT & RETENTION ACTIVITY/EVENT
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### RETENTION – Existing Active Members:

10		Reminder of dues deadline via e-mail
10		Invitation to renew via personal e-mail from officers/leadership/membership person (all = 10; half of members = 5; none = 0)
10		Invitation to renew via personal letter from president/Executive Director of Organization (all = 10; half of members = 5; none = 0)
10		Contact 1yr/2yr lapsed members via e-mail, phone or mail
30		Contact all existing active members regularly to learn how you're meeting their expectations.
30		Know the expectations and interests of new members who join.
20		Contact and follow up with new members on a regular basis throughout their first year to ensure their initial expectations are being met? (3, 6 and 9 months of membership)
10		Collect and review 'member intelligence' (i.e., inquiries, needs, feedback, activities)
20		Send membership card within one week of renewal (1 week= 20 points; 2 weeks=10 points; 3 weeks=5 points)
20		Send membership card within one week of joining (1 week= 20 points; 2 weeks=10 points; 3 weeks=5 points)
20		Send membership packet within 30 days of joining
20		Send reminder of benefits electronically
10		Member recognition program (i.e., certificates, pins etc.)
15		Survey lapsed members to find out why they didn't renew
10		Reward members for their loyalty: for giving feedback, referring others and renewing.
20		Periodically modify benefits to align with the members' current and evolving needs.
30		Formal retention plan in place, with written procedures and action plans to implement.
50		Active membership retention score. A. Number of renewed members this year = _____. B. Number of renewed members last year = _____. Subtract B from A and then divide by B to get percent change in one year. A decrease is 0 points. Score 2 points for each percent increase up to a maximum of 50.
<b>300</b>		<b>Total Score for Retention of Active Members</b>

## RECRUITMENT – Potential New Members:

10		Letter of invitation to join from Association officers/leadership/membership person
10		Contacted face-to-face by officers/leadership/membership person (all = 10; half of members = 5; none = 0)
10		Contacted via phone by officers/leadership/membership person (all = 10; half of members = 5; none = 0)
10		Contacted face-to-face by one or more members (all = 10; half of members = 5; none = 0)
10		Contacted via phone by one or more members (all = 10; half of members = 5; none = 0)
10		Contacted via e-mail by one or more members (all = 10; half of members = 5; none = 0)
10		Association membership benefits brochure/handout delivered (all = 10; half of members = 5; none = 0)
30		Formal recruitment plan in place, with written procedures and action plans to implement.
20		Active Membership Expansion Score. A. Total membership this year = _____. B. Total membership last year = _____. Subtract B from A and then divide by B to get percent change in one year. A decrease is 0 points. Score 2 points for each percentage increase up to a maximum of 25 points.
<b>120</b>		<b>Total Score of Recruitment of Active Members</b>

## General Membership Marketing

20		Association web page online
10		Association web page current
10		Association web page linked to National ACA website
20		Association brochure/handout identifying member benefits
30		Developed other recruitment/retention materials (newsletter/journal etc.)
20		Mentored another Association related to membership recruitment and retention
20		Utilized National ACA membership PowerPoint presentation or other materials as recruitment and/or retention strategy
15		Implemented an idea for recruitment and/or retention from National or other Associations
15		Recognize new members at meetings
10		Association meeting/workshop/conference held
50		Percent of active members attending Association meeting/workshop/conference (1 percentage point equals one point in score; i.e., 49% of members attended = 49 points. Maximum of 50 points.)

60	Percent of active members involved in committees (1 percentage point equals one point in score; i.e., 25% of members involved in committee work = 25 points. Max = 60)
<b>280</b>	<b>Total Score for General Recruitment/Retention</b>
<b>700</b>	<b>Grand Total</b>

Scoring:

700 - 595 = You are doing great in retaining and recruiting members. Share your best practices with others.

594 - 450 = You are implementing some retention/recruitment strategies and should use them consistently.

449 - 300 = You are spending more resources to recruit members than to retain them.

299 or below = You are losing members faster than you can recruit them. Time to Call for Help, take quick action now!

### ***Why is Member Retention a Challenge?***

Retention is a challenge for membership organizations for a variety of reasons. Depending on the organization's business environment, culture and structure, and ability to meet its constituents' expectations, specific retention challenges could be different. For most organizations, member retention is a challenge due to these common factors:

- **Competition:** There are more membership organizations than ever before. According to the American Association of Fundraising Counsel, as of 2005, the IRS recognizes over 1.6 million organizations as tax exempt under Section 501(c) of the Tax Code. Trade or business associations and chambers of commerce fall under this classification. Many are competing for some of the same customers. With the vast choices available in many communities, businesspersons and entities may choose to be a member of the local Rotary chapter, chamber of commerce, trade association, business council, or a civic or other type of organization. They may belong to only one organization, or a few or several, depending on the purpose and benefits they receive.
- **Lack of Perceived Value:** In lean times, as witnessed with the recent downturn in the economy, businesses and individuals may cut back on the number of organizations they belong to and focus their commitment on the ones that provide the greatest perceived value. No matter how beneficial an organization appears to staff and board members, value is perceived through the eyes of the customer, or member.
- **Insufficient Staff or Resources:** Depending on the size of the organization, people, time and money are limited. With the many functions and activities undertaken, most organizations find it difficult to concentrate on keeping their members.
- **More Emphasis on Recruitment than Retention:** Organizations often focus on recruiting new members to grow the size of the member base. More members mean increased operating revenue, which translates into a greater capacity to serve members. Sales initiatives, including membership drives, are focused on recruiting new members and not on renewals from current members.
- **High Turnover Rate of First-Year Members:** For most organizations, attrition is the highest with first-year members. There are many reasons to explain why new members do not renew after the first year including: joining to appease a friend during a membership drive, receiving incentives to join, and perhaps just curiosity to see what an organization offers. Whatever the initial reason, most new members choose not to continue with an organization after the first year because the perceived value and their expectations were not met.