Membership Development Chair Quick Start Guide

Introduction

Welcome to the Membership Development Chair (MD) Quick Start Training. This training assumes you have been recently selected to the position of the Section MD Chair and want to quickly learn the basics of your position. You've found the right place!

Your new position is one of the most important positions in your Section. The MD Chair is responsible for working together as a team with the rest of the Section Executive Committee in planning, organizing and coordinating activities for the growth, engagement and retention of existing members, recruitment of new members, as well as promoting the grade elevation of your members within your Section.

A number of topics have been identified that are important to address in the first 30 days.

Know your Section/Chapter/Affinity Group/Student Branch Officers

As the MD Chair, your role is to develop, build, engage and grow the membership for the Section. Requesting a start-up meeting with the Section Chair is a good way to share your thoughts, forge a working relationship and decide how to work together to best utilize your combined skills. It will also help to find out from the Section Chair what is expected from you during your appointed time, usually one year.
It is also important to meet and understand the other Officers of your Section, including any Technical Chapter Chairs and other Affinity Group and Student BranchOfficers so that you can work effectively and efficiently with them. So, if you have not already done so, you could ask the Section Chair to introduce you to the other elected volunteers in your Section Executive Committee. These should include the Chair, the Vice-Chair, Secretary, and Treasurer. A good way to meet your fellow officers is to attend your Section's Executive Committee meetings.

Take the opportunity to build teamwork among the Section, Chapter, Affinity Group and Student Branch Officers. The collaboration you will have with the other officers will determine your success as the MD Chair.

A personal contact by e-mail, phone, or even a face-to-face would help jump start building key relationships within your Section.

In addition to making contact with the Section Chair, you will need make contact with your Region Membership Development Chair. The Region MD Chair coordinates all membership development efforts from all of the Sections within the Region. This will be helpful to you should you need any assistance or for idea sharing.

The names of the Section Officers will be published in the IEEE Geographic Roster, so it is very important that you ensure that the Chair or Secretary of your Section has forwarded these to the IEEE MGA.

Key Points:
- Identify your fellow officers in your Section, Chapter, Affinity Groups and Student Branches Officers

- The requirements for serving as an IEEE Officer within your Section
- Key member geographic units and their relationships among them
- Procedure and importance of reporting the new Officers online
- How to find your Region Membership Development Chair

Review your Job Description

Your first task as you assume the role of Section MD Chair is to familiarize yourself with your new duties and responsibilities. Part of this familiarization is to help you understand where you fit in the overall organization.

Organizationally, your position reports through the Member and Geographic Activities (MGA) organization, both through your Section Chair as well as through the Region MD Chair.

As the MD Chair, you have the greatest opportunity to influence the development, engagement and growth of your Section through understanding your membership needs and then working with the rest of the Section, Chapter, Affinity Groups and Student Branch Executive Committees in the development of key programs that the members want. This will help to retain, engage and grow members in order to outperform previous achievements and also to inspire new and potential members about the extraordinary benefits that IEEE provides.

So to make this job easy, you should first look to meet with the previous MD Chair to ensure the continuity of successful programs and plans previously done are carried on. It also ensures that all relevant information is passed on. This is a good way to get a head start on your new job and can give you a big boost in tackling your new responsibilities. Be sure to identify key volunteers, documents, and other resources that have been useful to your predecessor.

There are 3 key responsibilities that the MD Chair is responsible for:

● to retain, engage and develop existing members;
● to grow and attract new members;
● and to promote membership elevation, such as transitioning from a Student or Associate Member to full Member or full Member to Senior Member

But in addition to the main responsibilities above, you will also be responsible for

● Receiving mailings of membership materials from IEEE Operations Center and give this information to the Section/Chapter/Affinity Group or Student Branch that it relates to
● Developing a local Membership Development Activities Plan
● Monitoring a current record of membership.
● Working with other volunteer leaders to develop, execute and monitor plans and goals for membership growth, engagement retention, and recovery.
● Analyzing membership information and trends to identify membership problems and opportunities. Share your Analysis with IEEE officers of your Section and discuss viable solutions
● Ensure adequate supplies of membership development materials are available for distribution at appropriate venues
● Communicating regularly with the Regional or Society Membership Development Officer

● Providing quarterly membership status reports with recommendations to the Section, Regional or Society Membership Development Officer
● Coordinating membership exhibits for local meetings and conferences, soliciting materials for exhibits, identifying volunteers to staff booth
● Optimizing local recruitment efforts by ensuring that Membership Development activities parallel headquarter's programs and processes
● Cultivation of prospect lists for membership. For example, use event attendance lists.

The complete list of roles and responsibilities are outlined in the IEEE Membership Development Manual, which can be accessed below.

The major part of this role is to "always be in the know" regarding programs and activities that members may be interested in. You will need to be a member on various online communities to see what is being discussed so that you may be able to advise the Section on potential topics or programs that may be of interest to your members.

It is also helpful to be knowledgeable about the calendar of events that your Section, Chapters, Affinity Groups and Student Branches have designed for the coming year so that they can be communicated to all members.

If you are still unsure what is expected from the position of MD Chair, sit down with your Section Chair or Region MD Chair and ask for clarification.

Key Points:

- Learn from your predecessor
- Where the MD Chair sits in the MGA Organization
- Job responsibilities for the MD Chair position

Getting Organized with Tools

The main tools involve knowing who your Section, Chapter, Affinity Group and Student Branch members are and how the development of membership is going. This can be done through a variety of IEEE tools including the SAMIEEE tool to analyze how you are progressing towards your membership development goals.

Listed below are a variety of tools you might find useful during your term as the MD Chair:

Websites and Useful Information:
IEEE Web Account:
Firstly, you should make sure you set up and use your IEEE Web Account so that you have access to the information, tools, and support that you will need in order to carry out your job. You can sign-up for your web account here.

IEEE Membership Development Web Site:
Start visiting the IEEE Membership Development web site at http://www.ieee.org/md.

The Membership Development website contains good presentation templates that can be customized for meetings/audiences that you will be attending in your capacity as MD Chair.

The Membership Development Manual

The MD Manual is carefully designed by the IEEE to provide a summary of duties for a MD Officer. It also includes a calendar for MD activities – based on the membership year (September – August), templates for correspondence, concise list of member benefits, strategy and planning, and advice for developing your membership team.

The MD Manual is your toolkit with all the tools, recommendations and suggestions carefully designed to ensure it contains relevant up-to-date information that will help you in your role. Review and read the MD Manual.

Analysis and Recruitment Tools:
Reports and Analysis provide you with vital information on trends and evolution of membership variables you need to consider when developing and reviewing your MD plans for your Section, such as recruitment, engagement, retention and recovery of members. This information will allow you to immediately see if you are losing members so that you can advise and work with your Section Executive Committee to take immediate actions.

MD Kit
Order the MD Kit online! The form is located on the MD website, http://www.ieee.org/md . Ask for it as soon as you can to help you get kick-started in your position. Here is how: http://ewh.ieee.org/forms/md/supplies-ondemand.php

SAMIEEE:
SAMIEEE is an on-line tool which gives you instant access to Section membership statistics and member information about your Section, Chapter, Affinity Group or Student Branch. IEEE's MD Chairs are automatically provided access to the SAMIEEE database. The data is updated weekly and pulled directly from the IEEE's membership database, reflecting the most current information.

On the SAMIEE site there are training videos to support your understanding of the Tool that will enable you to use it like a professional in matter of minutes. You can also design your own filters and ad-hoc queries for retrieving information that is required. Information provided by SAMIEEE can be very helpful for you in making future strategy decisions for your Section.

IEEE Support:
Your contact with MD community comes across two main methods: MD Report and MD webcasts, with both methods you will be supported trained and presented all actions and new ideas that every month comes from MD committee to all MD officers worldwide.

Monthly MD Webcast:
Attend the Monthly MD Webcast for IEEE membership information, activities underway, program updates and monthly membership statistic updates. Once registered in the previous step you will start receiving invitations to participate on the MD monthly webcasts.

Developed and executed by MD volunteers and staff, the monthly MD webcast provides current information on membership development activities, statistics, along with programs and services available to IEEE members. Each month features a Preview Topic and Business Cycle Spotlight and each session is recorded and posted to the IEEE MD Online Community.

An Archive Guide to 2010 / 2009 MD Webcast sessions is posted to the MD web site. Announcements of the upcoming webcasts are provided via the "md-alert-all" alias list and via the MD Online Community. You will need to register for this webcast via the email invitation. Please request this invitation to your Region MD Chair, if you are not receiving it perhaps your name is not in the distribution list please contact your Region MD Chair.

Register for the "md-alert-all"
As the MD Chair, you are invited to attend the email list to receive the monthly Membership Development Report and announcement for the monthly MD Webcast. This is one of the most important sources for ideas at the time you need to plan your activities to recruit, retain and reinstate members on the objective to build a strong and active Section. This email list is used by IEEE MD Staff to send out membership development communications to volunteers, officers and key volunteers in IEEE organizational units.

For the "md-alert-all"? Send an email to mailto:listserv@listserv.ieee.org, leave the subject line blank and type "subscribe MD-ALERT-ALL" in the body of the message (without the quotes).

Once you are on the "md-alert-all" list, you will receive reports and announcements needed for membership development including full reports and analysis that are the pulse of the global membership development.

Join the MD Online Community:
The MD Online Community is useful to join in order to share information and ideas with your membership development peers. Join the MD Online Community from the MD website, http://www.ieee.org/md

Discuss any questions and plans with your Section Chair and Region MD Chair. They will be glad to assist you.

Key Points:

- The MD web portal is your one place to go to first
- Requesting your IEEE Web Account
- Registering for your monthly MD updates and webcasts from IEEE HQ
- Accessing and using SAMIEEE through simple and Ad-Hoc Queries
- Ordering membership development kits for membership drive
- Joining the MD Online Community

Organize your Committee

You may wish to recruit a small team of volunteers to assist you in planning and carrying out the work required for membership development. Ideally, recruiting two additional volunteers to assist you would go a long way to help you achieve your goals.

One person could be assigned to work to retain, engage and develop existing members; another could be focused on growing and attracting new members. In some cases you may wish to add a third person to your MD Committee: a volunteer who focuses on membership promotion; such as transitioning from a Student Branch member to GOLD or Associate Member to full Member. No doubt, your Section Chair and other Section Officers can help you find volunteers who are willing to serve on your MD Committee.

Once you have formed your committee, organize a session to discuss duties and responsibilities associated with your committee to ensure that each team member is familiar with the roles and responsibilities specific for their position or task. Be sure to communicate the importance of the work that needs to be done and your expectations for success.

To get you kick started, here are some helpful hints:

Who can help me?

Get as much information fom your predecessor as possible
Ask your Section/Chapter/Affinity Group/Student Branch if they could refer available volunteers
Recruit members from your Section such as GOLD members, Life Members, Student Branch members
Set up your team and let them know what the work is and who is doing what
Kick-start your MD Committee by organizing a meeting to discuss roles and responsibilities
What is the Work? (More on Planning & Goal Setting in Topic 6)

Outline the work you want to accomplish
Outline the work you need accomplished
Break down the work into the amount of time needed, how often it gets done (frequency) and prioritize
Outline the work so those interested can see if they have the skills and/or time to help
Determine which volunteers will be working and assign
How should I communicate with my team?

An important aspect of committee work is communications. As head of your MD Committee you will be responsible for keeping your members informed of plans, activities, and events relating to the Committee's work. So it is important that your Committee members keep you informed on progress and issues related to their work. Therefore, you should clearly communicate your expectations to your Committee and then regularly follow-up to ensure that progress is being made as planned. This will go a long ways towards ensure a smooth operating committee. You must also remember that it is your responsibility to communicate your committee's work to the Section Executive Committee and the Regional MD Chair.

Set up an email list to send communications on projects to all members
Update your Section, Chapter, Affinity Group and Student Branch Officers on your team's progress regularly
Update status of work to team so they know projects or work are moving forward or not meeting deadline
Inspire and encourage your team to work toward the goals through effective communication
How can I motivate my team?

To keep good volunteers motivated, a little recognition goes a long way. Acknowledge and showcase the volunteers who advance your Membership Development plan. Present them with certificates of accomplishment, buy them dinner, and/or submit their names to IEEE for recognition in the monthly Membership Development progress report.

How can I recognize the volunteer effort of my team?

Recognize the volunteer effort of your team
When work is completed, or a milestone met, recognize the volunteers' accomplishments to the team and to your Section or society officers.
Acknowledge those on your team at Section or Society meetings
Nominate for a Region, Section or Society established award
Invite them to the year-end Section dinner together with all of the Section Officers as an incentive and reard for their hard work

Key Points:

- Utilize members from your Section or society who want to participate and have some time to work on tasks.
- Understand that you are not alone in the effort of membership development and other volunteers/members can work with you in support
- The 3 key responsibilities: retain/develop members, grow/attract new members, and promote current members throughout their professional careers
- How to form your MD Committee
- Ensure your Committee members understand their roles and your expectations for success
- Committee communications is important, both among members and to Section Executive Committee and Regional MD Chair

Understanding your Stakeholder Needs and Interests

A necessary first step in planning is to understand the needs and interests of your members or stakeholders. Getting some key information from your Section, Chapters, Affinity Groups and Student Branches is crucial for you to succeed in your role. It is your responsibility to ensure that you are developing programs and activities that inspire, attract, retain, engage and recruit new and existing members throughout the Section and its various groups. Therefore, it is important for you to know how to understand and interpret the needs of your members and potential members so that you will be able to design a plan to provide local services to satisfy their specific needs and to show how the IEEE can serve them better.

Retain, Engage and Develop:
To retain, engage and develop your members, you should look to have a good understanding of what programs and activities over the past few years have been of high interest and successful to that group of members. You can find out this information from talking to your predecessor or the Section Secretary as to past attendance for specific topics, what was successful and what was not, along with finding out some basic member statistics from SAMIEEE. It's useful to try and identify any previous activities that are of interest to the members as well as any new activities that they might be interested in. A survey might also be another way to get this information quickly.

It is also a good idea for your Committee to contact your local university faculty and department heads to explore potential volunteers for such activities as tutorials and short courses of interest to engineers in your Section. The idea is to match interests and needs of local engineers with educational resources that may be available through local university faculty, local technical leaders, or the IEEE.

As part of your retention strategy, it is also very important check who did not renew their membership, not just last year but for many years. Try to find the reasons why they do not

renew their membership. There you will find lessons to learn and actions to take to minimize further loss of members.

Grow and Attract New Members:

To "Grow and Attract" members, it would be useful to contact the local IEEE members, local industries, universities, and other local institutions to determine areas of interest to practicing engineers in local industry, possibly, again, by using a survey. The information gained from the survey can then be used to target new members by offering topics and programs they had indicated in their survey that they would like to see. The more specific you can make your programs to this group of potential members based on the survey results, the more likely they will be to recognize the benefits and to join the IEEE.

Promote and Elevate:

Lastly, to "Promote and Elevate" members requires getting information on all the members that are in the "area of transition" of their membership. This is normally 6 months from their "transition point". For example, if a Student Member will be graduating at the end of the next term, or the 10th Anniversary of them becoming a GOLD member is coming up. This information can be extracted from SAMIEEE or with help from IEEE HQ Membership Development. These "transition points" will be crucial to get on top of in order to proactively begin promoting the benefits of the IEEE to them prior to them discontinuing their membership.

Ideally you should have completed the survey phase within the 1st 30 days after you have assumed responsibilities for your position. Once your Committee has surveyed the local community you are ready to develop your Section Membership Development Plan, which we will cover in the next Topic.

How to understand your members has no one right recipe. You have the advantage that most probably you belong to the same culture and geographic interests as your members. So find ways to establish a long term relationship linking the IEEE Section i.e. You, with individual members.

Remember also that member growth and development is not just a number but a confirmation that your Section is providing valuable services that professionals and students want from the IEEE.

Key Points:

- Understand the needs and wants of your stakeholders
- Become familiar with IEEE resources and previous Section activities of interest to stakeholders
- Identify previous activities that are of interest to the local community
- Determine areas of interest to practitioners in local industry
- Contact university faculty and department heads to find potential volunteers for tutorials and short courses
- Complete survey activities within one month of your appointment

Planning and Goal Setting

Once you have formed your MD Committee, and found out about your members needs and wants, it is time to turn to the important task of planning what you want to achieve over the next year.

Following the IEEE's Strategic Plan, the Region and Section should ideally develop a Membership Development Plan for your Section. Check with your Section Chair and Region MD Chair to see if your Section or Region already has a plan in place. If not, you will need to create one.

A planning meeting can be held as the 1st MD Committee Meeting, or often a special session where more time can be allotted to work specifically on your MD Plan. The MD Chair should have some idea of potential goals, but it is important that the goals be owned by the entire committee if you want to be successful.

A good plan will have no more than 3-5 major goals. Each goal should be measured with meaningful metrics, such as how many new members you hope to attract this year? Or a target number of how many members will be promoted this year?

Your Region or Section may set membership goals in their strategic plan for the overall Section, but then set specific goals to each Chapter, Affinity Group and Student Branch, with your input. Whether the goal is to increase membership retention by 3% or grow membership recruitment by 5%, an effective membership development plan needs to have quantifiable metrics.

It is important to understand the importance of recruitment, retention and recovery of members and how and which programs and tactics can be used successfully to meet your goals. Therefore, each goal that you develop above should be supported by an action plan (an activity with a date) with an identified champion or owner. This person is then responsible to make sure the activity is planned and executed properly and on time.

To help you with some ideas on key goals and activities that can be used, the IEEE Membership Development Yearly Calendar of activities in the MD Manual is really useful. This Yearly Calendar is to ensure the coordination and collaborative effort with IEEE Headquarters on the best way to communicate to your Sections general membership.

Once you have developed your Section MD Plan with your Committee, then you might wish to circulate this plan to your Section, Chapter, Affinity Group and Student Branch Chairs and committees to get their feedback. Be sure and send a copy to your Regional MD Chair for their feedback and records, also.

A plan is best followed if it is reviewed regularly. So review your plan with your Committee regularly, usually on a monthly basis when the MD Committee meets. A monthly meeting is a good way to keep track if progress is being made, and if deadlines or targets get missed, then it is easy to spot and to discuss what actions can be taken to increase your activities or change tactics when something isn't working.

The results from your monthly MD Committee meeting can then form the basis of your update to the Section Executive Committee meetings.

For a template of a monthly MD report that has been created following the style and format of the IEEE monthly MD Report contact: grow-membership@ieee.org. The templates can be used by the MD Chair to communicate membership statistics and training information regarding programs and activities of interest.   Data necessary to populate the statistics area on the template can be pulled from SAMIEEE using the pre-defined Geographic or technical queries. The templates are posted to the MD Online Community for convenient downloading and personalization by each MD Chair.

Key Points:

- Plan your activities with your MD Committee
- Use the IEEE Membership Development Yearly Calendar as a template
- Understand the importance of recruitment, retention and recovery of members and how program and tactics can be used

- What a Calendar Year for Recruitment, Retention and Recovery activities looks like

Publicizing Membership Benefits

One of the fastest ways to get members either to renew their memberships or to join the IEEE is to continually let them know how the IEEE can benefit them. Each member will be different as to why they have an IEEE membership. Individuals are so important that most of your time will be spent on personal interactions, not only technical but social as well. As such, you will find your job alot easier and rewarding if you are close to the individuals that need and want the IEEE benefits and services. This includes members and most importantly future members.

The best way to publicizing the various IEEE benefits is to first understand them yourself. So a comprehensive list of potential benefits is outlined below. This is by no means an exhaustive list but gets you started in understanding the vast array of benefits the IEEE does have to offer.

Therefore, at every opportunity, you, or one of your Committee members, should be present at all of the various events held by the Section, Chapters, Affinity Groups and Student Branches. Introduce yourself to the audience at every possible event and be ready to present IEEE Member benefits to a broad audience at every Section/Chapter/Affinity Group or Student Branch sponsored event. This can only be achieved if you work closely with your local IEEE Officers to find out when these events are. Make sure the Officers understand the importance of presenting the membership benefits at every social and technical meeting to take full advantage of publicizing the benefits of IEEE membership..

Talk frequently to the Members. Make every event an opportunity to introduce yourself and talk about the opportunities, empowerment, training, interesting technical projects and topics that IEEE Membership brings.

Understanding and communicating to members how IEEE distinguishes Member Grade Levels and what benefits and services are important to the different grades will be crucial in order to maintain the member's interest level as they move through their professional career.

IEEE Affinity Groups (AG) offers members another possibility to retain membership within the IEEE. These Affinity Groups are more focused around a community of interest and tend to focus on non-technical activities but rather of common interest topics. Likewise, introducing them to the various Technical Chapters available may appeal to their technical interests in a certain discipline.

Here are some ideas to get you started:

Develop an IEEE Presence at each Event
Invite Life Members, Students, GOLD and others with available time to help share the work. The tasks, no matter how trivial, can yield profound results. Something as simple as designating an individual responsible for bringing membership applications to every Section or Chapter meeting or event will ensure a membership recruitment presence for non-members in attendance. Designating an individual as a "greeter" at an event will establish a welcoming environment.

Member-Get-A-Member (MGM) Program, http://www.ieee.org/mgm

MGM encourages members to recruit their colleagues or fellow students to become IEEE members. As a reward for their efforts, they receive credit that can be used toward the following year's IEEE dues, IEEE Society fees or the purchase of IEEE products and services.

Senior Member Upgrade (Full Member Transition to Senior Member)http://www.ieee.org/membership_services/membership/senior/index.html
IEEE membership statistics reveal that individuals who hold Senior Member grade are more likely to renew their IEEE membership. Take actions to promote IEEE Senior Member elevation.

IEEE STEP (Student Transition & Elevation Partnership),http://www.ieee.org/gold
Provides a standardized yet localized program for facilitating the transition from Student Member to young professional, by introducing the opportunities and benefits of IEEE membership during the onset of a career.

Hold joint Section, Affinity Group or Chapter meetings with local Student Branches
Give the students a chance to meet professional IEEE members, ask questions about engineering careers and start building their networks prior to graduation.

IEEE Conference Member Recruitment (CMR) Program, http://www.ieee.org/cmr
This program runs from 1 September through 15 August the following year and its goal is to recruit new IEEE members at conferences. As an incentive to join IEEE, each new full-dues paying higher grade IEEE membership applicant is given a free membership to one of IEEE's 38 Technical Societies. This is in addition to the normal discount that IEEE members receive on the conference registration fee.

Promote IEEE Membership
Display member benefits on all IEEE entity web pages and provide a link to the online membership application. Have a staffed membership table with applications and related MD materials at all Section, Chapter, Affinity Group and Student Branch meetings. Recognize local companies who support IEEE activities and membership.

Communicate Value and Benefits
Communicate the benefits and services offered by IEEE at all meetings and activities. Before you can communicate the value, you need to know the benefits of membership. For a full list of benefits, go to http://www.ieee.org/benefits.

Key Points:

- The benefits of membership
- The different transition programs available to a member throughout their career
- Different ways to communicate the benefits of the IEEE to current/future members
- Each Section/Chapter/Affinity Group and Student Branch event is an opportunity to discuss the advantages of membership
- Identify the tactics you can use to reach your membership development goals

Money Matters

Every unit within the IEEE organization works within a financial budget. Knowing how much you have for the year to spend on activities, meetings, events or conferences, publications and newsletters or your website is crucial to ensure that there is enough money to cover all of the expenses for the year required to meet the goals you set earlier.

So, the first thing you will need to find out when talking money is what was the assigned budget from the previous year. Normally, the Section Chair or Treasurer will be able to tell you this information, if you don't already have it. Normally, there is usually some money set aside for membership development types of activities.

Once you have this budget, you will need to compare your assigned budget to the cost of executing your MD Activity Plan. If your assigned budget is not enough to cover your planned activities for the year, then you will need to submit your new budget for approval to your Section Executive Committee.

If the Section Committee approves your new budget, then you can get started. If they do not, then you must go back and remove some activities or scale down the cost in some way so that your MD Plan matches the assigned budget. This new MD Plan and assigned budget normally is then resubmitted to the Section Executive Committee for approval but check with your Section Chair for the exact financial process to follow.

You may also see if the Region MD Chair can help to fund some of your activities. Normally, if the activities combine several Sections or Geographic areas, then the Region MD Chair can normally assist with some funds. So make contact with your Region MD Chair to see what monies might be available for you to use.

Key Points:

- Your assigned Sections budget must match the cost of your activities in your MD Plan
- Some funding might be available from the Region MD Chair

Conclusion

Congratulations - once you have kicked off your term as Section MD Chair with the above Quick Start topics, you have the basic tools to hit the ground running in your role. Your role will evolve after the first 30 days as a critical part of your Section's contributions to the furtherance IEEE's mission. After the 1st 30 days, take a look at the Position Training for the Membership Development Chair for additional training material to help you with the rest of the year in your role.