



# Membership Retention

WSC Summer Leadership Meeting  
July 13-15, 2018

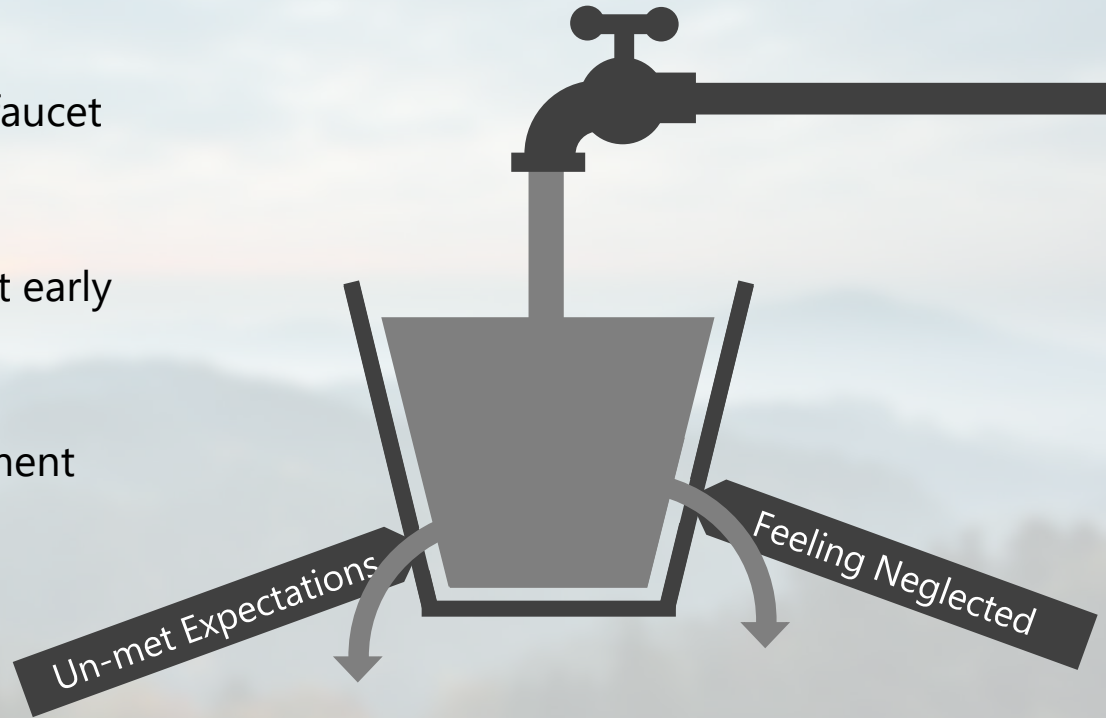
# Introduction/Overview



- Managing The Membership Bucket
- It's all about them
- Communicate...Communicate...Communicate
- Best Practice Retention Strategies

# The Membership Bucket

- Membership is like a bucket under a faucet of water
- Relevant and meaningful engagement early will prevent leaks later
- Retention is just important as recruitment



# Understanding What They Want out of Membership



- It all starts with the first conversation
- Everyone's reason for joining is personal. Find out what it is
- Ask them why they joined and what they want to get out of it:
  - Is it charitable? (Volunteering with family)
  - Do they want to give back to their local communities? (Helping the elderly or disabled)
  - Do they want to be part of a fraternal group of catholic men like them?
  - Is it for spiritual reasons? (Prayer groups?)
- Dig deep and get to the true reason they joined

# There's Something for Everyone – Find Out What it is



## FAITH

### RSVP

Into the Breach

Marian Icon Prayer Program

Building the Domestic Church Kiosk

Rosary Program

Spiritual Reflection Program **New**

Holy Hour **New**

Sacramental Gifts **New**

## COMMUNITY

Coats for Kids

Global Wheelchair Mission

Habitat for Humanity

Disaster Preparedness

Free Throw Championship

Catholic Citizenship Essay Contest

Soccer Challenge

Helping Hands **New**

## FAMILY

### Food for Families

Family of the Month/Year

Keep Christ in Christmas

Family Fully Alive

Family Week

Consecration to the Holy Family

Family Prayer Night **New**

Good Friday Family Promotion **New**

## LIFE

Marches for Life

Special Olympics

Ultrasound Program

Christian Refugee Relief

Silver Rose

Mass for People with Special Needs **New**

Pregnancy Center Support **New**

Novena for Life **New**

# Develop a Relationship...And Make it Relevant

- **Make it Personal:**

- Assign a member that works to understand the new member's needs.

- **Engagement:** Have the member develop a personal relationship

- Communicate 1:1 regularly on their terms
- Frequency and method (email, phone, f2f coffee)

- **Meaningfulness:**

- Be open to new ideas they have
- Suggest and encourage participation in programs they're interested in

# Best Practice Retention Strategies

1. Building a Strong Member Communication Process
2. Retention Committees
3. Managing 'Unpaid Dues' Red Flag

# Building a Strong Member Communication Process



## 1. Communicate Consistently

- Ask them how they like to be communicated to and how frequently
- Online surveys (Survey Monkey, Typeform)
- Email a survey and compile results

## 2. Determine what works best for your council

- Email, Newsletter, Blog, Bulletins, council trifold brochures
- Create an annual communication schedule and stick to it
- Focus on consistency over quantity
- Ensure published (website) information is accurate



# Building a Strong Member Communication Process



## 1. Create a Council Engagement Spreadsheet

- Personal membership profile
- History of their membership participation
- Record notes on their level of engagement

## 2. Touch member personally and consistently

- Cards and Notes: Birthday, anniversary cards/ joining anniversary, child's first communion or confirmation
- Track what creates a positive reaction

## 3. Promote the Council's Successes

# A Retention Committee



- The retention committee is the support structure for your council. They keep in touch with the members and make sure they feel 'part of the team'.
- The chairman is responsible for making sure that there is consistent and ongoing outreach to members.
- Structure
  - Chairman
  - Typically one committee member for every ten Knights
  - All 3 trustees (ideally)
- Meet monthly for 1 hour (Best practice)
  - 20 minutes-Member by member review-Update spreadsheet
  - 20 minutes- ID delinquent members
  - 20 minutes Whos follow up with who. Action plan to follow up with everyone
    - Agree to follow up actions with a phone call

# Retention Committee Responsibilities



- Ensure your Knights are engaged and happy
- Touching base, building a meaningful relationship, and keeping track of member's satisfaction with their membership
- Identifying member concerns immediately and helping them find a solution

# Managing the 'Unpaid Dues' Red Flag



- The biggest red flag that a member is losing interest is when he stops paying his dues
- Build a Process around Managing unpaid dues
  - Review list of members ID'd as past due
  - Assign member to contact immediately
  - Probe in detail to understand level of engagement
  - Ask what they want to get involved with
  - Encourage them to participate in a program that fits that desire

# A Best Practice Process for Saving Members

- Have the council work process
- The District Deputies need to stay closely involved



## Retention Committee Report

### Members in Danger of Being Suspended

Member Information	Amount Due	Status	Contact Notes
<b>Abboud, Anthony</b> 21548 Se 28th Ln Sammamish, WA 98075-9591	48.00	Intent to Retain	Date: ___/___/___
Res Phone: 425 392 5034 Cell Phone:	Email: ABBOUDANTHONY@AOL Proposer: Tyson, Francis D Proposer Tel #: 425-743-1470		
<b>Adams, Bart</b> 2824 Sahalee Dr E Sammamish, WA 98074-6354	48.00	Intent to Retain	Date: ___/___/___
Res Phone: Cell Phone: 425-443-3544	Email: Proposer: Proposer Tel #:		
<b>Bachesta, James P</b> 1207 212th Ave Se Issaquah, WA 98075-7165	48.00	Intent to Retain	Date: ___/___/___
Res Phone: Cell Phone:	Email: jbachesta@comcast.net Proposer: Steffes, Donald G Proposer Tel #:		
<b>Bahn, David E</b> 21519 Ne 9th Pl Sammamish, WA 98074-6754	48.00	Intent to Retain	Date: ___/___/___
Res Phone: 425-868-4530 Cell Phone:	Email: bombsquad@gmail.com Proposer: Steffes, Donald G Proposer Tel #:		
<b>Barry, Christopher D</b> 237 Morden Rd Oakville, OH L6K 2	48.00	Intent to Retain	Date: ___/___/___
Res Phone: Cell Phone:	Email: chris.barry@microsoft.com Proposer: Proposer Tel #:		
<b>Beeta Mathew, Reji</b> 23120 Ne 8th Pl Sammamish, WA 98074-3692	48.00	Intent to Retain	Date: ___/___/___
Res Phone: 425-818-4839 Cell Phone: 206-295-4878	Email: Proposer: Long, Ronald G Proposer Tel #: (425) 392-2902		
<b>Biggsby, Michael R</b> 1121 211th Ave Ne Sammamish, WA 98074-6725	48.00	Intent to Retain	Date: ___/___/___
	Email: MBIGSBY@GMAIL.COM		

# Best Practice Member Retention Process



1. First and Second Billing Notices are sent to members
2. Financial Secretary sends delinquent list to retention committee
3. Retention Committee assigns member to contact
4. Retention committee compile report using Retention Committee Report in Member Billing
5. Financial Secretary sends Knight Alert letter to all delinquent members
6. District Deputy is notified of Retention results and of all documentation of used by Retention Committee
7. District Deputy notifies State Retention Chairman and conduct due diligence
8. State Deputy reviews recommendation to determine concurrences
9. District Deputy provides feedback to Council on next action, either:
  - a. Process Intent to Retain on all or some delinquent members; or
  - b. Correct identified deficiencies as directed by the District Deputy and State Deputy
10. Council completes requested action based on feedback
11. If Intent to Retain are files with Membership Records mandatory 60 day hold is in place, meanwhile council/district continue to work delinquency list

# Best Practices For Member Retention

1. Start your retention efforts on day 1
2. Reach out early and often
3. Make it personal. Understand what they want to get out of it
4. Find out why they joined, do more of it
5. Build on their original motivation for joining
6. Constantly evaluating what works and why it doesn't
7. State Retention Coordinators: Seattle, 2; Tacoma, 2; Olympia, 1; Vancouver, 2; Yakima, 1; Spokane, 2