

*CSHP Board and Branch Reference Manual*

<b>CATEGORY: Membership</b>	<b>PAGES: 3</b>
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<b>TITLE: Membership Recruitment and Retention</b>	<b>REVISED:</b>

## BACKGROUND/RATIONALE

In 2017, a Membership Recruitment and Retention (R&R) Working Group was formed by the Board to develop strategies to achieve the membership recruitment and retention goals set by the Board in the 2015-2020 Strategic Plan. The Working Group determined that there was a lack of role clarity regarding responsibilities for membership recruitment and retention.

The Working Group compiled a framework to clarify the roles and responsibilities of the Board, the office, branches, and membership committees with regards to recruitment and retention. This policy serves to formalize these roles and responsibilities.

## DEFINITIONS

**Members:** refers to both members and supporters

**Poll:** usually consists of a single question, covering one (1) topic. Typically the question is closed-end type to which the respondent may select no more than only one choice. Polls are small, simple and quick, and results considered a general overview. There are 2 types of polls: census – all people in a population are polled, and sample – a representative groups (however chosen) is polled to represent the population.

**Survey:** more comprehensive than polls. They usually have more than one question, can cover a wide range of topics, and be of varying length and style. Surveys are mainly used to gauge the opinion of members on a broad topic or to gain detailed feedback, both of which may require a series of questions. They may include questions that are open-ended or close-ended, or a mixture of both. There are 2 types of surveys: census – all people in a population are surveyed, and sample – a representat3ive group (however chosen) is surveyed to represent the population.

Both polls and surveys may be conducted via different modes (e.g. in-person, online, paper) or a combination thereof.

## POLICY

*This policy applies to CSHP national and all its branches.*

Responsibility for various phases of membership recruitment and retention is shared between the Board, Branches, the Office, and the Membership Committee, as set out below:

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**Board**

- Approves policy
- Approves Strategic Plan and Vision, including targets for membership growth
- Monitors membership trends, including progress towards membership targets
- Approves national membership fees, including discounts

**Office**

- Develops strategies, resources and tools used for promoting membership to CSHP, including (but not limited to):
  - Membership recruitment and renewal campaigns
  - Welcome plan for new members and supporters
- Develops Engagement opportunities, Products, Services, and affinity programs that provide value to CSHP members and supporters
- Provides information used for monitoring membership targets and evaluating R&R efforts
- Carries out aspects of the R&R efforts/tactics, in coordination with the branches
- Surveys members periodically to determine their needs and benchmark R&R activities
  - Surveys will be done on a periodic basis, to align with the strategic planning cycle. Surveys will include a way to filter results based on branches, and include input into questions from the branches

**Branches**

- Carries out the R&R tactics, in coordination with the office
  - Provide personal, familiar (or peer) link to new, current and lapsed members and supporters
  - Tailors R&R tactics to the local membership
  - Develops local R&R tactics
  - Owns responsibility for achieving the branch membership targets, including providing financial and human resources for achieving the targets
- Provide advice and input to the Office with respect to:
  - Identification of local needs of members
  - Evaluation of R&R efforts/tactics
  - Potential Engagement opportunities, Products, Services and affinity programs
  - Sharing local R&R strategies and experiences
- Approves Branch membership fees, including discounts
- May carry out polls of Branch Members

**Membership Committee**

- Convert to Advisory Group(s) / Working Group(s), reporting to the Office.
- Advises office and provides input into the R&R tools / Engagement opportunities / Products / Services developed by the Office
- Advises Office on R&R tactics and strategy

## **PROCEDURES**

- Membership targets are set and approved by the Board as part of the Strategic Plan. Targets represent the total increase (or decrease) in membership number compared to baseline, and include both recruitment of new members and retention of existing members.
- Membership targets are provided to the Branches, and include the total number of members and supporters to achieve the targets for that branch.
- Strategies, resources and tools used for promoting membership in CSHP are developed by the Office, with input from the Branches and the Membership Committee.
- Branches are responsible for carrying out R&R tactics and “own” the responsibility for achieving the membership targets for that branch.
- Progress towards membership targets is monitored by the Board.
- Membership targets may be re-evaluated and adjusted by the Board, as required.