Guide to a Successful Membership Campaign

Oregon Main Street
Heritage Programs
Oregon Parks and Recreation Department

Oregon Main Street
Heritage Programs, Oregon Parks and Recreation Department
725 Summer Street NE
Salem, Oregon 97301

www.oregonheritage.org

9/2008

Table of Contents

Introduction

Membership campaigns generate a vital revenue stream to help support overall downtown revitalization activities and they can be a dependable source of income year after year to help pay for basic operating costs. The importance of the campaign goes well beyond dollars raised. A well-crafted campaign is a key opportunity to have one-on-one contact with district stakeholders to share information about organizational priorities and activities, and to get feedback. They can raise the visibility of the organization in the community and in the press. They can also help attract energetic volunteers. Finally, membership campaigns give district stakeholders an opportunity to financially invest in something they believe in—restoring the "heart and soul" of the community.

A lot of background preparation goes into launching a successful membership campaign. The membership campaign needs to present a compelling case of why people should give to an organization. People give to organizations that have a strong mission they believe in, that demonstrate an on-going need for funding, and have a good plan for continuing to provide services. This guide is intended to help prepare your organization put together a winning effort to raise the funds you need.

Who Does What

The first task in a membership campaign is to determine who will take the lead in developing the overall fundraising strategy. Many programs fumble at this point because roles are not clearly defined which leads to confusion over who is doing what (see "What's My Role in the Membership Campaign" in the attachments). Key players include the organization committee, the board of directors, staff, and volunteers.

Organization Committee. The organization committee is usually the lead in developing the overall membership campaign. Often, a special membership subcommittee is formed under the organization committee to fulfill this function. The role of the organization committee in the membership campaign process is to:

- Develop the overall membership campaign plan and submit to board for approval.
- Coordinate implementation of membership campaign.
- Recruit additional volunteers needed to assist with the campaign.
- Monitor progress.

If you do not have an organization committee, consider creating a membership subcommittee of the board.

Board of Directors. The board must review and approve the membership campaign plan prior to implementation. In addition, the board needs to oversee the fundraising effort to make sure the campaign is on track. Individually, board members should:

- Contribute.
- Understand, endorse, and oversee planning.
- Contribute to mailing list.

- Help identify and evaluate potential members.
- Share in cultivation of key potential members.
- Make introductions to potential members.
- Make the "ask."
- Write supporting letters.
- Write thank-you letters.
- Write personal notes on annual appeals and make personal phone calls.
- Accompany others in asking.

Staff. The principle role for staff is to support both the board and organization committee. This is mainly "behind the scene." Staff should not be expected to ask for funds because this can be perceived as asking for their salary. It is far better for peers to solicit peers and sell the mission of the organization. Specifically, staff should:

- Take initiative and generate membership campaign ideas for the organization committee and the board.
- Manage information (keep records, mailing lists, and acknowledgements).
- Prepare correspondence and help draft fundraising materials.
- Support the board and organization committee by motivating, recommending, encouraging, stimulating, and thanking.

Steps in the Membership Campaign

Asking for funds is one of the most fearsome tasks for volunteers. It shouldn't be. Volunteers invest time, money, and faith in the program and want it to succeed. Developing a creative, well-organized campaign will set volunteers up for success. Indeed, it can be a fun bonding experience for board members and volunteers. The following is an outline of key steps for the overall campaign.

1. **Ensure documentation is in order.** The organization committee, with the help of staff, should prepare a file for the office with all the necessary information needed to respond to potential questions. This information will also be useful in putting together campaign materials. Some of the things to include in file are:
   - Articles of Incorporation.
   - By-laws.
   - Tax exempt status notification.
   - Copies of annual IRS Form 990 filings.
   - Copies of audits (if applicable).
   - Current budget.
   - Board of Director's list with their affiliations.
   - List of contributors.
   - A "one-pager" on the organization.
   - One page bio of key staff and volunteers.
   - Annual report or list of accomplishments.
   - A few relevant letters of support or testimonials.
   - Important newspaper clippings about the organization.

- Stories of successful assistance to business and property owners and the positive impact the organization is having on the district.
- Anti-discrimination policy.

2. **Establish campaign goals.** The board, with input from the organization committee, establishes campaign goals based on approved work plans as well as overall funding needs of the program. Goals include:
   - Target dollar amount to generate through the campaign.
   - Retention rate of existing members.
   - Number of new members to recruit.

3. **Assemble the membership campaign team.** Volunteers work in teams of three people. The organization committee identifies four team leaders who are responsible for identifying two additional team members (for more "mature" programs, have volunteer teams of five people—the team leader and four additional team members). Team members should include a mix of board members and other volunteers. Have a friendly competition between the teams with prizes awarded to teams who recruit the first new member, for the most money raised, and for the most members. Team members decide how to approach potential members (e.g., in-person, by phone, or a combination of the two).

4. **Prepare a schedule.** In preparing the schedule, the organization committee should consider other organizations' funding campaigns, major community events, and other activities to minimize conflicts. Tips:
   - Strategize the best time for the campaign.
   - Use a work plan form and set deadlines for the entire campaign, including the production of support materials and follow-up.
   - Keep the campaign to a short three to four week timeframe for greater impact and to keep volunteers motivated to make their contacts.

5. **Provide incentive for early renewals.** Send out letters one month in advance of the campaign to let current and potential members know when the campaign will be launched. Include the membership solicitation piece. Have an "early-bird" discount for renewals received in advance of the campaign. This will reduce the number of individual contacts the teams need to make.

6. **Develop a list of contacts.** The organization committee makes a list of all previous and potential members. The committee should set aside names of individuals or groups to ask as major donors. Major donors should be contacted by board members or the organization committee before the membership drive begins. To identify potential members, the organization committee should:
   - Look for potential gaps by reviewing and refining the organization's stakeholder list.
   - Look for opportunities to leverage business and personal relationships.
   - Limit the number of calls each volunteer is required to make.
   - Divide the list into an "easy" list of previous paid members and potential member list. Allow teams to alternately select from each list so they have a balanced mix.

7. **Set a target amount to raise from each contributor to meet overall campaign goals.** The organization committee makes recommendations to the board regarding overall membership categories and is subject to board approval. The organization committee also provides each team with background information on renewing members with suggested contribution levels. The dues structure should be realistic yet optimistic for the community and the goals of the campaign.

8. **Develop a campaign theme**. The organization committee should establish an overall theme to bring attention to the campaign and help energize volunteers. Some thoughts to get you started include:
   - Family: “We are family working together for a better community.”
   - Resumé: “We work for you.”
   - Puzzle Piece: “Be an essential piece of something great.”
   - Stock Certificate: “Take stock in downtown.”
   - Casino: “Main Street is a sure bet.”
   - Desert Island: “Are you feeling stranded? Main Street will rescue you!”

9. **Determine premiums or other incentives.** Ideas include:
   - Static cling membership sticker.
   - Membership photo or certificate.
   - Small token linked to campaign theme (e.g., hand-delivered helium balloon, key chain, message in a bottle, magnet, or chocolate puzzle piece).

10. **Develop campaign materials.** This includes an “advance letter” to let people know when the campaign will start as well as membership packets. Membership packets should include a membership brochure, membership form, information sheet about the organization with accomplishments, news articles, etc. It is important to provide enough information for potential members to make a decision, but not so much they feel overwhelmed. Tips:
    - Personally sign letters. This takes time, but the payoff is high.
    - Include a personal note (when appropriate).
    - Use testimonials from well-respected members describing what the program has done and why they contribute.

11. **Train volunteers.** Host a one-hour training session for all campaign members. Tie the training to the selected campaign theme to keep it fun and entertaining. Have volunteers do a role-playing exercise (see “Role Play Exercise: Typical Questions Raised by Potential Members” in the attachments). This is also the time to divide up the contact list among teams. Make sure volunteers have:
    - Membership packets.
    - Campaign guide with information about the organization and the campaign (see sample in the attachments).

12. **Launch the campaign!** The “early-bird” portion of the drive is finished, the theme has been established, materials readied, teams selected—now the campaign begins! Make sure to contact key media to let them know the campaign is underway and keep them informed of the progress toward your goal.

13. **Host a celebratory party for the campaign volunteers, including awards.** It's almost over. Teams bring in their final membership pledges. Tally the results. Distribute team and individual prizes. Be sure to thank everyone regardless of their individual totals.

14. **Host a "Main Street" mingle for new and renewing members.** Work the campaign theme into the celebration!

Meeting the Potential Member

Hopefully, the "early bird" solicitation was successful in capturing renewals from current members. This will significantly narrow down the list to those who need to be targeted during the campaign. To capture remaining new and renewing members, the most effective solicitation tool is a face-to-face. Remember:

1. Always be on time!

2. Initiate the meeting with small "chit-chat" and explain the agenda for the meeting. Make sure and thank the potential member for taking time to meet with you.

3. Deliver your presentation.
   - Membership brochure.
   - Annual report or list of accomplishments.
   - Other materials.

4. Be a good listener and manage the conversation.
   - Let the potential member talk. This can develop enthusiasm and interest in the organization.
   - Do not get led off the subject or purpose of the meeting.
   - Avoid making negative comments.
     - Isn't the economy bad?
     - Hasn't it been a bad year?
     - I know business is terrible, but….

   - Turn negatives into positives.
     - Our organization is focused on economic enhancement and beautification of our district.
     - The district is successfully managing the tremendous growth in our area.

5. Be yourself.
   - Remain confident and comfortable.
   - Be polite and courteous.
   - Remember, you are a peer in this discussion—conduct the discussion as such.

6. Ask for one category above the expected contribution amount. Keep in mind:
   - No one gives more than he or she can.
   - People rarely give more than what they're asked to give.

- Aim high enough to challenge and flatter them but don't be unrealistic.
- Don't stop on the first "no."

7. Remain positive.
   - Let the potential member know you are providing a unique opportunity to participate in a worthy cause.
   - There isn't a reason to feel embarrassed or apologetic.
   - Emphasize member recognition options but don't promise things not on the list.
   - Avoid mentioning negative circumstances.
   - Let your personal commitment and passion for the organization show.

Handling Objections

Try to understand what the objection is when faced with a "no" from a potential member. Objections fall into one of five categories and understanding these categories will help you respond. Naturally, objections will vary from person to person, and from situation to situation. View each situation individually. As in all dealings, be polite, tell the truth, do not promise more than you can deliver, and do what you say you will do. The types of objections include:

1. Focus or use of the contribution: "I don't think we need that project" (i.e., one of the activities the organization is working on).
   - This type of objection is an opportunity to educate the potential member about the needs in the district and the overall scope of your comprehensive work plan. "Educating" is different than "convincing."

2. Timing of the contribution: "I just can't afford it right now" or "I need to check with my spouse."
   - With this type of objection, the issue is "time," the solution is "a better time." Try to get the potential member to tell you when would be a better time, or a time when both will be available so you may call on them again.

3. Size of the contribution: "That's more than I can give."
   - They may be open to the amount if they could make twice a year or quarterly payments. If not, be ready to ask for a smaller amount by offering a lower giving level.

4. Administration of the gift: "How do I know you will do what you say you'll do?"
   - This type of objection is an opportunity to let the potential member know the things your organization has accomplished. If your organization is new, this is an opportunity to mention the names of well-know community leaders involved with the program. If the potential member knows and trusts the volunteers, they will be more open to contribute.

5. Stewardship of the donor: "If what you want to accomplish is________, then what you should do is______."
   - This objection is sometimes an opportunity to find a new volunteer in addition to a contribution. Listen to the comments made and offer opportunities to make their ideas a

reality (when possible). Share information on how your organization sets priorities and develops your annual work plan.

There is no guarantee you will convert every “no” into a “yes.” If the answer is still “no,” keep the lines of communication open—the next time you ask for a gift, your potential member may say “yes.”

Tips:
1. Seek to understand and clarify the objection.
2. Be prepared to use alternative proposals.
3. Be flexible in your response.
4. Seek to maintain the relationship with the member.

Positive Closure

Make sure to end each solicitation on a positive note regardless of whether the potential member contributes or not. In order of priority:

1. If possible, reach agreement during the meeting.

2. While most potential members will contribute, if a prospect can’t contribute to the drive, ask about other opportunities:
   - Sponsorship of an event.
   - Annual auction donation.
   - Next year’s drive.

3. Ask what the organization needs to do to become the potential member’s “charity of choice.”

Communication

Board members, organization committee members, and staff should keep in contact with members on a regular basis beyond the campaign. This demonstrates you value them beyond their financial contribution. It will also help retain members. Suggestions include:
- Invitations to all events and activities.
- Handwritten notes on newsletters pointing out articles that might be of interest.
- Periodic visits just to check in and see how things are going.

Acknowledgement

Thank all contributors within a week of receiving their membership dues. A handwritten note should be prepared and signed by the board president, staff, organization committee chair, or the volunteer who contacted them. The personal touch will help with membership retention. As a follow-up, send a receipt in January to each member for tax purposes and to thank members again for their contribution the previous year. Identify other ways to acknowledge new members (e.g., on the website, in the newsletter, or in the annual report).

Attachments

What's My Role in the Membership Campaign?

	Board Member	Staff	Organization Committee	Volunteers
Who recruits volunteers?			X	
Who asks for money?	X		X	X
Who decides $ goal?	X – with input from Org. Comm.			
Who plans the campaign?			X	
Who keeps records?	X			
Who does the PR in advance?	X		X	
Who sends thank you's?	X - or	X - or	X - or	X
Who trains volunteers?		X	X	
Who informs media of results?		X	X	
Who decides timing?	X – with input from Org. Comm.			
Who creates materials?		X	X	
Other:				

Membership Campaign Planning Checklist

1. **Selecting Type of Campaign**
   - ☐ Letter/Telephone
   - ☐ Letter/In-person
   - ☐ Telephone
   - ☐ Other: ____
2. **Developing Campaign Theme:**____
3. **Campaign Timeline:** **Start Date:**__________ **End Date:**___________
4. **Assigning Responsibility**
5. **Preparing Volunteers/Type of Training:**
   - ☐ Presentation/Overview of MS
   - ☐ Learning How to Ask for Contributions Role Playing
   - ☐ Written Materials
6. **Preparing Materials to Complement Type of Campaign Selected**
   - ☐ Campaign Solicitation Packet
   - ☐ Brochure
   - ☐ Letters
   - ☐ Ads/PSA's
   - ☐ Other:____
7. **Implementing the Campaign**
   - ☐ Making Contact
   - ☐ Collecting Funds
   - ☐ Follow-up
   - ☐ Thank you's
8. **Staying in Contact**
   - ☐ Invitations to Events/Activities/Meetings
   - ☐ Newsletters
   - ☐ Email
   - ☐ Personal Contact
   - ☐ Other:____

Role Play Exercise: Typical Questions Raised by Potential Members

Organize a role playing exercise to help teams prepare for questions they may be asked as part of the campaign. Members take turns playing either the solicitor of funds or the potential member. Be creative so you prepare your volunteers for hitting the streets. Sample questions include:

1. I have never heard of your organization. How long have you been around?
2. What are the pledge categories and costs?
3. How were those pledge figures determined?
4. How much do establishments similar to mine give?
5. What do you do with the funds?
6. Who are your board members? How much do they give?
7. What do I gain by contributing?
8. When do you want your money? Can I pay in installments?
9. I cannot afford what you want.
10. I want to think about it.
11. Why should I pay dues to the downtown organization when I am already a Chamber member?
12. Do you have contributions from outside the downtown district?
13. How long is this program going to last? How long do you want my financial commitment?
14. How come it costs so much?
15. Can I earmark my contribution for a specific event or activity?
16. How many volunteers do you have?
17. Do you have more information?

Membership Recruitment Guide…Everything You Need to Know!

Follow these simple steps....

Thank you! We appreciate your support during the 2008 Membership Drive. We have outlined a few steps for you to follow to make the drive as easy and successful as possible. Please call the office at 555-1212 if you have questions at any time during the drive. Once again, thank you for your support.

Know Your Product

Who: Kruppopolis Downtown Development Association

What: 501c3 nonprofit organization—volunteer based—We focus on economic development within the context of historic preservation in our traditional downtown.

Where: The area served by the KDDA is from Broadway to Main and from 12th to State.

When: The KDDA has been serving the community for 5 years. First known as the Downtown Business Association, the organization now follows the National Main Street Approach™ to economic development within the context of historic preservation.

Why: Economic development of our historic downtown secures property values; expands and upgrades the retail, service, and residential environment; preserves the identity of our community; protects existing infrastructure investment; offers opportunities for business growth and expansion; and promotes a better community image.

How: We have four volunteer committees to accomplish the goals of the organization based on the Main Street Four-Point Approach™. The committees are:

- Organization
- Design
- Economic Restructuring
- Promotion

Know Membership Benefits

With your support, KDDA will:

- Publish the *Downtown Quarterly*, your source of information about events and activities.
- Give downtown a face-lift to attract more shoppers and visitors.
- Retain and attract businesses that reflect community needs.
- Emphasize the hometown atmosphere of the community.
- Promote cooperation between all downtown stakeholders.

Funding

Research has shown downtown revitalization efforts are most successful when funded by diverse sources including community, business, and corporate memberships; local government; and fundraising events.

Select (at least) Five Businesses to Contact

Each team member should select (at least) five businesses to contact and invite them to invest in the KDDA. You may select your contacts in either of the following ways:

Select your contacts from the potential member cards. Potential members have been listed on 3x5 cards and are available for your use. Please check that the information is correct prior to contact. Note any updates or changes on the cards.

If you can't seem to find a card listing someone you think should be a member, feel free to fill out a blank card with information on additional prospects. Call on a business or contact you know.

Record the name of the business, business address, and your name on the sheets provided for recording purposes when you have selected your five cards. If you think of additional contacts after you leave the kickoff – call the office and we will make sure the information is properly recorded.

Make Your Contacts

Personal contact works! Please take the time to contact your prospective members in person. If you are more comfortable, give them a call to set an appointment to discuss "an important investment they can make in their community." Whatever your style—make the contact. While visiting your prospective member, remember to include the following information:

- Benefits of membership
- Track record of the KDDA
- Why YOU are involved – share your experiences with the district.

Hang in there....you're almost done!

Turn in Your Pledges & Checks

Turn in your pledges and checks to the KDDA office once you have made all of your contacts. **Please turn in all materials by Friday, November 9.** The office will track the membership drive results. The Membership Recruiters (that's you!) who collect the most new members will receive the following rewards:

- 1st Place—dinner for the team prepared by the board president and bragging rights for one year.
- 2nd Place—lunch at Mom's Diner for the team.
- 3rd Place—special selection of chocolate truffles from Hometown Candies for the team.

Attend "Thank You" Reception

After all the hard work is over—let us say "thank you" to you! We will tally the final results and announce the winners and membership drive results at the reception. The location and time of the reception will be announced at a later date.

Until then...

Thank you for your support of the KDDA! We are making great strides in the enhancement of the historic business district because of your efforts and all our other wonderful volunteers and supporters.

Thank you in advance for making this membership campaign a success!