

# Learning Pod Notes



## Welcoming New Members

How does your council currently welcome new members?

- Announce new members at each meeting, asking them to stand.
- Provide list of new members to the board in advance of meeting.
- Keep board informed of new applicants and members at large.
- Ask the referrer or speaker to introduce new members.
- Give new members opportunity to speak as a meeting presenter.
- Welcome packet
- Email all members re: committees – before being on the board, members must serve on a committee.
- At meetings, Membership Chair gives a 2-minute elevator speech encouraging all members to get to know the new members (buy them a drink?)
- Predetermined seating at meeting.
- Annual meeting program lists all members throughout the year.
- There's a raffle for referring members – all sponsors get a ticket for referring a new member. Winner gets a bottle of wine or something else.
- Calls and outreach during the year.
- Stress the importance of consistent connection.
- Corporate membership.
- Some councils had no current practice for welcoming new members.
- Red star on nametag / badge identification.
- Designate a meeting spot for new members
- Speed "dating" for new and seasoned members.
- Personal calls
- Listing in brochure
- Guests are introduced, but new members are not.
- Non-voting, younger member initiative.
- Facebook new member spotlight
- Website placement / introduction
- Plexi-frame so all members can see names and seek
- Greeters – someone charged to buy a drink for new members.
- One council noted that they are gaining an equal number of members to loss – a large portion of their members only go to one meeting. Board members are charged with seeking and finding those members.
- New member breakfast – including those members that are 1-3 years new plus the board. Others are welcome, but not encouraged to join.
- Original application for membership asks about volunteerism and follow through.

Council Leadership Day – November 6, 2018

55<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference

- Speed networking event.
- Welcome letters.
- Introductions, but no brief remarks.
- Introduce guests at meetings.
- Sponsor pays for guest meals.
- Permanent badges for members.
- New member banner for 6 months.
- Mail a packet with all NAEPC information (A-Z brochure), they get a new member ribbon at first meeting.
- Accept members only once per year. Application period, and once they're admitted, they invite them to the EOY dinner and recognize that they'll be new members starting new year.
- Cash their check.
- Guests can come to one meeting at no charge.
- Admin follows up after meeting, asking if they enjoyed the meeting and if there is anyone they'd like to meet.
- Annual all-member social.
- Send a welcome letter with info about the council, encouraging them to join their LinkedIn group, include a flyer for the next meeting, include a directory, if they're in attendance at next meeting, they're announced.
- Cash their check and don't let everyone in.
- New member ribbon.
- Front page of newsletter.
- Send a welcome email with login information, and link to NAEPC member benefits.
- Theoretically we call during the first 30 days.
- New members committee – all people that have been members for 2 years or under are on the committee and plan events.
- Announce them at quarterly meeting, and give them the chance to speak. Board is encouraged to introduce themselves.
- New member breakfast. Although mostly board members attended, with only a couple new members.
- New member luncheon – only the leadership and new members go. They say that new members are required to sign up for a committee at the luncheon.
- Immediately upon acceptance, add them to the website, giving them some recognition. Send a new member packet.
- At a meeting, put a frame of the names of new members near where they put their name in the jar for a drawing (wine), near the CE table. Board members are taking new members around to introduce them to others.
- If there is assigned seating, assign a mentor to the new member and have them seated with each other. Mentor can also take new member around for introductions.
- If you have a newsletter, put the new members in there, with a border around it. Highlight them. Some people like to do an interview with a new member. Some people have a new member page on their website.

- How do you keep the new members involved? Letters, emails, phone calls throughout the year. At end of the year, go back to them and ask what they liked / not liked about the council. Retention aspect is important.
- Send letters and ask for new members to be a guest at an upcoming meeting / event.
- Pre-event meetings – have a separate room so new members can meet board members or other members before the meeting/event.

Not directly related to new members, but a referral / reward program is tangentially related. New member was introduced by old member. We have shown the new member some love, but now we show the old member some love too. Old member gets a bottle of wine to choose from. The information can then go into the newsletter, highlighting both old and new members.