

Editor's Note: In keeping with our custom, the first issue of **Chapter Update** for 1997 addresses membership recruitment and retention programs and activities. Since we began emphasizing the importance of membership activities a few years ago, we have witnessed an increase in the number of chapters that have implemented membership programs. During this time, we have tried to provide chapter leaders with easy "how-to" information about recruitment and retention programs.

This issue of **Chapter Update** is no exception. In it, Max Russell lays out a few simple activities that chapters can use to develop a membership program and determine membership prospects, and explains how chapters can best use the membership informa-

tion and services provided by the College's Organization Department.

Membership activities will continue to be a focus of our chapter relations programs in the future. During the 1996 Clinical Congress, the Board of Governors approved a recommendation that (1) each chapter should appoint a membership committee, and (2) the chair of this committee should serve as a voting member of the chapter council. By elevating membership activities to a visible level of importance and by tying membership strategies to the chapter's overall management of its day-to-day activities, chapters will be able to interest many Fellows who reside in their areas in joining the chapter and participating in its programs and functions.

ACTION:

THE KEY TO MEMBERSHIP RECRUITMENT AND RETENTION

by Max Russell, Max Russell + Associates, Inc., Chicago

In preparing this issue of *Chapter Update*, we asked chapter leaders to tell us how their membership committees address the challenges of recruiting and retaining members. A response from John Preskitt, MD, FACS, president-elect of the North Texas Chapter, clearly defined one of the most important keys to successfully attracting new members and keeping them. Dr. Preskitt wrote: "At our chapter, we tend to attack problems by creating programs rather than committees. We have made membership recruitment a major council item, and therefore the entire council deals with it. Our council is large, well diversified, and meets often. Most of the 'doers' in our chapter are on it."

That word "doers" really sums up what successful membership recruitment and retention is all about. It's not just paying lip service to membership development, but taking specific, results-oriented action—doing, not talking. This issue of *Chapter Update* offers you concrete action steps you can take immediately to ensure that your chapter recruits and retains the kind of enthusiastic, involved members you need to sustain a strong, successful chapter.

Membership: A Shared Responsibility

In a very real sense, every chapter member shares personal responsibility for helping the chapter grow and thrive. But

like all shared responsibilities, membership development requires leadership and guidance from the "doers." A strong, committed membership committee, headed by a results-oriented chairperson, can make recruitment and retention a high-visibility chapter activity in which all members can and will participate.

Start with a clearly laid-out game plan. It doesn't have to be an elaborate, complicated strategy. It simply has to define specifically what you want to accomplish and how you're going to do it.

- Set specific, quantifiable goals for membership in terms of both recruitment and retention. For example: *This year we will recruit at least 75 percent of all new College Initiates.*
- Define the specific activities you will undertake to attract new members. For example: *We will personally invite every eligible nonmember to at least two chapter activities this year.*
- Define the specific activities you will undertake to retain existing members. For example: *We will personally invite every current member who has not participated in at least one chapter activity during the past year to take an active part in a specific chapter event.*

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- Give specific assignments to individuals and set deadlines to make sure the job gets done. For example: *We will ask each active member to take personal responsibility for inviting at least one nonmember to our annual meeting.*

When action steps and accountabilities are clearly defined, individual members are much more likely to take their personal responsibilities for recruitment and retention seriously and to make sure the job gets done.

Maximize Your Resources

The College's Organization Department supports chapter membership development activities throughout the year by serving as a resource for information and consultation on recruitment and retention. Here are some of the services that are readily available to you.

Membership and Prospect Lists

The comprehensive roster of Fellows that the College provides to each chapter twice a year is one of your most valuable membership recruitment resources. These rosters include the name, address, surgical specialty, membership status, and the year Fellowship was awarded for all individuals who are affiliated with the College. This is not a chapter membership list, per se. Rather, it's the entire universe of eligible prospects and your starting point for recruitment and retention.

Here are some ways you can use the comprehensive rosters:

- Compare the roster with your current chapter membership list. By making this comparison, you will immediately be able to identify all prospects who are eligible for recruitment, but who are not yet members—Fellows, Associate Fellows, and Participants in the Candidate Group.
- Use the roster to update your existing membership list. This step is vitally important to membership retention, because accurate mailing lists are essential to communicating with current members about chapter activities.
- Create your own computerized membership and prospect lists from the rosters, which will give you faster, easier access to recruitment and retention data and make future updates much simpler.

The College's Organization Department also periodically provides other lists and information that you can use to augment the information provided in the list of Fellows.

List of New Initiates

Immediately following the Clinical Congress each year, your chapter receives a separate list of that year's new Initiates in your chapter area. Compare this list with your membership roster and add the names of any new, nonmember Initiates to your prospect list.

Candidate Group Participants List

Your chapter receives a separate list of all Participants in the Candidate Group in your chapter area twice each

year. These individuals are surgical trainees who have indicated their intention of becoming surgeons and who are eligible to participate in chapter activities, receive the *Bulletin*, attend the Clinical Congress, and enroll in College-sponsored insurance programs. Encourage these prospects to affiliate with your chapter and to participate in all its educational programs and activities. These are the Fellows and chapter leaders of the future.

Mailing Labels

To make communicating with membership prospects even easier, the Organization Department also offers sets of mailing labels for Fellows, Associate Fellows, and Participants in the Candidate Group in your area. You can use these labels for membership recruitment mailings, educational program promotions, and other chapter-specific activities. As a way to help chapters with their membership communications, these mailing labels are provided free-of-charge.

Membership Brochures

To help you recruit younger members—Associate Fellows and Participants in the Candidate Group—the College includes information on the importance of chapter membership in special brochures developed for these categories of surgeons. You should keep a supply of these brochures on hand to distribute to residents and surgeons who express an interest in becoming Fellows of the College. For copies, contact Chapter Services at 800/553-3743.

Chapter Activities Survey

Every three years, the Organization Department surveys all chapters regarding their organizational structures, administration, activities, and programs. The Triennial Questionnaire includes a section specifically dedicated to membership recruitment and retention. You can use the results of the questionnaire to compare the effectiveness of your membership development activities with those of other chapters, help set your membership goals, enhance your current efforts, or develop new recruitment and retention strategies. To review the most recent questionnaire results, consult **Section I** of the *Chapter Guidebook*, or contact the Organization Department.

Learn From Experience: Recruitment and Retention Strategies That Work

If imitation is the sincerest form of flattery, "borrowing" successful recruitment and retention activities from other chapters is a high compliment to your colleagues. Here are some membership ideas that others have used successfully. If you'd like to consult with another chapter on a specific tactic, the Organization Department can help put you in touch.

Strategies for All Prospect Categories

- Send a personal letter, signed by your chapter president, to everyone on your prospect list inviting them to join. Tailor membership benefits as specifically as possible to each prospect's interests. Enclose a membership applica-

Know Your Prospects, Target Your Strategy

Although the College does not aggressively pursue applicants for Fellowship, it does encourage surgeons to aspire to and work toward attaining Fellowship. The qualifications for Fellowship, as specified in the College's bylaws, are also the basic requirement for chapter membership. The following brief descriptions can help you categorize your various membership prospect groups.

While the members of these groups share similar characteristics, they each have different expectations and needs for joining the chapter. By defining what those expectations and needs are, you can determine the membership benefits that will be most valuable to each type of individual and use that insight to motivate them to join.

You can further tailor your recruitment strategies to specific groups and individuals by identifying other characteristics that may influence their decision to join—for example, their specialties, geographic location, practice type, or years in practice. The more you know about your prospects, the easier it is to focus on the benefits of chapter membership that will most appeal to them.

Candidate Group Participants

This important group of prospects represents the future leadership of our profession and the College. Getting them involved in chapter activities now will help them realize their full potential and ensure our ongoing success. Although not eligible to serve on national committees or to hold office, physicians in residency training qualify for affiliation with the College through the Candidate Group. They can take advantage of the College's educational and professional services and are

expected to adhere to the principles and policies of the College and to attend at least one College meeting every two years. As a result of their affiliation with the College early in their professional careers, it is hoped that these individuals will seek Fellowship when they become eligible.

Associate Fellows

Before they become eligible for Fellowship, surgeons can assume an active role in the College and its chapters through the Associate Fellowship category. The category is open to those who have successfully completed an accredited surgical residency or have entered an additional surgical residency, research, or fellowship program. Associate Fellows are eligible to serve on most College committees and participate in College-sponsored insurance programs. They are a particularly important group of prospects for chapter membership, and their early involvement will help ensure their continued participation and contribution to the profession, the College, and your chapter.

Fellows

Any Fellow of the College who does not participate in the local chapter should be considered a prime prospect for chapter membership and strongly encouraged to join. An applicant for Fellowship must meet the College's stringent requirements regarding surgical education and, among other requirements, must have completed two years of surgical practice in one location. After a thorough peer evaluation of an applicant's performance of surgical procedures and professional ethics, he or she may be nominated for Fellowship. The awarding of Fellowship then requires approval by three-fourths of the Board of Regents.

tion, along with a schedule of future meetings and educational program dates.

- Designate an active member to follow up with each nonresponding prospect within six weeks after every membership mailing. The more personal the contact the better—in person or by phone, if possible.
- Do a special mailing of your chapter newsletter to prospects. Include a personalized invitation to join and an application.
- Add prospects to your regular mailing list for educational programs, if nonmembers are eligible to attend. Consider offering to waive or reduce the registration fee for prospects who join the chapter and register for the program at the same time.
- Make sure current members—especially the chapter leaders and very active participants—know who the

nonmembers are by distributing prospect lists and asking members to invite any prospects they may know to join.

Strategies for New Initiates

- Send a personal letter of congratulations from your chapter president to each new Initiate in your area (use the new Initiate roster provided by the College) and invite them to join the chapter. Enclose a chapter membership application and a schedule of chapter events. Be sure to follow up with nonrespondents within six weeks. (Note: The Director of the College and the chairpersons of the Advisory Councils also send congratulatory letters and reinforce the importance of chapter membership.)
- Consider offering a free one-year or six-month membership or waiving registration fees for an upcoming

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educational program for new Initiates who respond to your membership invitation.

- Publish the names of all new Initiates in your area in your chapter newsletter with a note of congratulations. Then, send a copy of the newsletter to each Initiate, along with an invitation to join and an application.
- Sponsor a reception at Clinical Congress for new Initiates in your chapter area. This is a particularly good time to meet and welcome new Initiates personally and to encourage them to join the chapter.

Strategies for Candidate Group Participants

- Send a personal letter of congratulations from your chapter president to each new Candidate Group participant in your area (use the annual roster of Candidate Group participants provided by the College) and invite them to participate in an upcoming chapter activity. Waiving registration fees would be particularly appropriate for this group.
- Place Candidate Group participants on your chapter newsletter mailing list. With the first newsletter mailed, enclose a note of congratulations or an invitation to attend an upcoming chapter activity.
- Assign each Participant in the Candidate Group to a “mentor” from your active chapter membership. Mentors should make personal periodic contact with the participant to offer professional assistance, advice, or support. Mentors can also serve as hosts to Candidate Group participants who attend chapter activities.

Strategy for Retention: The Exit Interview

Individuals who allow their memberships to lapse may do so for a variety of reasons. A member who relocates to another chapter area is one thing. A membership that lapses because of dissatisfaction or underappreciation of the value of chapter participation is an entirely different situation.

A short “exit” interview by telephone is a quick, inexpensive way to discover why a member has chosen not to renew. Here’s a sample script you can tailor to meet your specific needs.

Good morning. My name is _____, and I chair the membership committee (committee member, etc.) of the _____ Chapter of the American College of Surgeons.

I understand that you’ve chosen not to renew your chapter membership for the coming year. It would be a great help in making sure we’re meeting the expectations and needs of our members if you would take just a couple of minutes to talk with me about your decision.

(If the member agrees, proceed with the following questions. If not, quickly and cordially conclude the conversation.)

Questions:

1. What was your main reason for not renewing your chapter membership? (Avoid reading the list below. Instead, allow members to respond in their own words and check the reasons from the list below that apply. Summarize others that may be given).

- ___ Retired
- ___ Relocated
- ___ Too expensive
- ___ Time or place of meetings inconvenient
- ___ Did not see the benefits
- ___ Program content poor or not appropriate to my practice (Why?)
- ___ Can get the same information/benefits from another source (Specify?)
- ___ Never received a dues invoice
- ___ Had a specific complaint (What?)
- ___ Other

2. How would you rate the following chapter services (excellent, good, fair, poor). (Make a note of any other comments.)

Chapter newsletter	Excellent	Good	Fair	Poor
Chapter educational programs	Excellent	Good	Fair	Poor
Chapter social activities	Excellent	Good	Fair	Poor
Chapter services overall	Excellent	Good	Fair	Poor

3. Did you feel welcome at chapter programs and events? _____
4. How many chapter programs or activities did you participate in last year? _____
5. What other kinds of chapter services or activities would make membership more valuable to you?

6. In your opinion, how could we do a better job of serving chapter members?
7. Would you consider rejoining now? _____
At a later date? _____

If you know the reasons members leave the chapter, you may be able to persuade them to rejoin. At the very least, you may learn what changes you could make that would prevent others from leaving for similar reasons. Finding the answers to these questions will help strengthen your chapter’s membership recruitment and retention program.

21st Annual Chapter Officers Seminar

Mark your calendars! The 21st Annual Chapter Officers Seminar (COS) will be held on May 29–31, 1997, in Chicago. This year's program promises to be very informative and helpful to all chapter leaders. The complete program and registration materials will be distributed in March. Watch your mail for complete details!

Also, on Thursday, May 29, we will conduct the 4th Annual Chapter Administrators Special Session. This session, which is limited to chapter administrators only, is scheduled from 10 am to 5 pm. This special session is a great opportunity to meet other administrators and to share your chapter management skills. Administrators, plan to attend!

Young Surgeons Representatives Meeting

Young surgeons from nearly every domestic chapter will convene in Chicago April 27–28, 1997, for the Annual Meeting, sponsored by the College's Committee on Young Surgeons. Each chapter is invited to send up to two young surgeon representatives. For more information about the meeting, or to submit the name(s) of your chapter's young surgeon representative(s), contact Jan Fair in the College's Surgical Research and Education Department at 312/664-4050, extension 231 (or e-mail jfair@facs.org).

1997 Triennial Questionnaire Coming Soon!

The Triennial Questionnaire that covers chapters' activities will be mailed soon. This year, the questionnaire has been substantially revised. We hope that the new survey instrument will be easier to use and, therefore, provide us with better information to use in developing programs and services for chapters. As usual, for chapters that have administrators, the questionnaire will be sent to the administrators; for other chapters, the questionnaire will be sent to chapter secretaries. Also, informational copies will be sent to all chapter officers.

Chapter Objectives

- To provide for close fellowship of members in uniting their efforts to elevate the standards of surgical education and practice
- To provide a medium through which surgical experiences may be presented and discussed
- To provide a meeting ground for all surgical specialties
- To provide a forum for young surgeons
- To provide financial support for the College's Endowment Funds
- To offer assistance to professional and civic groups concerned with the health of the community
- To provide a mechanism for focusing local attention on national College programs (for example, the Committee on Trauma and the Commission on Cancer)
- To encourage Associate Fellows and members of the Candidate Group to affiliate with the chapter



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