

Membership Management Team

**CALIFORNIA-HAWAII ELKS ASSOCIATION
MEMBERSHIP MANAGEMENT TEAM MANUAL**

2013-2014



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Membership Management Team

MEMBERSHIP MANAGEMENT TEAM

2013 – 2014

TABLE OF CONTENTS

MEMBERSHIP MANAGEMENT CONCEPT1

FORMATION AND IMPLEMENTATION3

BRINGING THE TEAM TOGETHER.....4

SPONSOR \ PROPOSER.....6

STRAY ELK PROGRAM.....6

Plus +1 PROGRAM AND ZERO DELINQUENTS PROGRAM.....7

GRAND LODGE INCENTIVES PROGRAM.....8

SUMMARY.....10

MEMBERSHIP TEAM ORGANIZATIONAL CHART.....11

Membership Management Team

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Membership Management Team

California – Hawaii Elks Association Membership Management Team Guide

2013-2014

Membership Management Concept:

The Lifeblood of our Order continues to be Membership. As a team, we must work together to change the downward trend that we are experiencing within the Order.

In order for our Lodges to survive, they must continue to actively pursue the ultimate goal of a “Plus One” membership. To achieve this goal, we must work hand in hand with our members, committees and local communities. We must not only increase the membership but we also need to retain the members that we presently have.

As the Exalted Ruler is the CEO of the lodge so is he the Team Leader of the Membership Management Team. The Exalted Ruler should appoint an Officer as the coordinator of the team. The Lodge Membership Chairman is the driving force who works with other Committee Chairs and members to carry out a successful Membership Program. (See page 3)

The Grand Lodge Membership Control Manual (Control #5104) should also be reviewed by the members and referred to as a guide to assist them in their endeavors.

With the Team in place, a meeting should be held to set the goals and objectives for the lodge year. The team should meet once a month. The team should work towards initiating a number of new members equal to at least 10% of the starting number of members in the lodge as of April 1st. This is in addition to those added to the rolls by transfer, dimit and reinstatement. The team should also set a goal of no higher than 2% member loss for the year.

The following is a list of suggestions that a Membership Management Team should consider in obtaining the goals and objectives they set for the year:

- 1. Actively recruit new members during social events throughout the year.**

Membership Management Team

2. Use the Grand Lodge Incentive program to recognize the success of members who bring in new members.
3. Give a new member an application and charge that he/she recruits at least one new member during the Lodge year.
4. Promote the Elk Inquiry program found at www.elks.org.
5. Actively promote the membership program during lodge meetings and report the additions and losses of members for the prior month.
6. Promote the Elks during Community Activities and Events.
7. Activate a Stray Elks Program, identify paid members living in your community, contact them and invite them to the lodge.
8. Recognize Sponsors for their recruiting efforts.
9. Encourage each member in the lodge to “Ask” someone to become a member.
10. Brain Storm new ideas to recruit and retain members.

The Lodge Membership Chairman should regularly evaluate the results of the overall membership procurement, reinstatements and indoctrination. He can then share this information with the other team members and compare the results from the previous year.

I am confident that with proper planning, hard work and the participation of all our members we can turn this downward trend around and meet and exceed our membership goals for the upcoming year.

The following information is a Guide discussing the Formation and Implementation of a Membership Management Team in a Local Lodge:

FORMATION AND IMPLEMENTATION

Formation:

Selection of Membership Committee:

It is imperative that the Membership Committee consist of a team of members and not a committee of one person or the Secretary.

Selecting the Membership Committee (The Management Team), requires care and some forethought. The Chairman should be enthusiastic and highly motivated to devote time to attain the set goals. Committee members should be enthusiastic, active and well known in the Lodge and their Community. The number of Committee Members may vary according to the requirements and membership of the Lodge. (Use the Lodge Bulletin to recruit Committee members.)

***The Secretary of the lodge maintains the Clms program for the Lodge and should not be the Membership Chairman.**

1. Exalted Ruler, as Team Leader shall appoint the management team.
2. An Officer of his choice should serve as the Coordinator.
3. Other members of the team should include the Lodge Membership Chairman and members within the lodge. (May consist of the Activities Chairman and the Public affairs Chairman)
4. Obtain and study the Grand Lodge Membership Control Manual #5104.
5. Prepare a plan of action and implement the plan.
6. Set Goals

Duties of the Committee Chairman and Committee Members:

1. Membership Procurement (Entire Team)
2. Interviews and Investigation
3. Indoctrination (Orientation)
4. Membership Retention (Lapsation)
5. Community Awareness (Lodge Activities/Public Relations)
6. Collection of Dues and Billing and Statistics (Secretary).
7. Grand Lodge Membership Incentives Program, (Recognizing Achievement)

Bringing the Committee Members together:

It is up to the Exalted Ruler and Membership Chair to discuss with the Committee the importance of securing new members and the membership objectives.

After setting up the Committee, defining the program and establishing the goals, the committee members should meet and discuss the entire program. The Committee should Brain storm new ideas and discuss what can be done better or smarter to promote membership and retain members. All good ideas must be examined and implemented if possible.

Setting Goals:

Lodge Goal should be to initiate 10% more members than the number of members as of April 1 of the New Year. End the year with not more than 2% of the members that are delinquent and drop not more than 2% of members for non- payment of dues.

Implementation:

Membership Procurement

The Membership Committee should work with and encourage the Lodge Membership to assist in identifying prospective members. Obtain lists of prospective members from other sources such as Chamber of Commerce members, professional societies, and other leading service clubs and organizations. This could also include a list of personal friends and acquaintances of Lodge members.

Ask Lodge members that are participants in other Organizations to assist in bringing new prospects into the lodge.

Once a prospective member has completed an application and paid the application fee, it should be turned into the Lodge Secretary for review and processing.

Membership Management Team

Section 14.010 has been changed to expedite applications for membership. “Within 3 days of its receipt, each application shall be referred to the Membership Committee which, after completing its duties shall report at the next Lodge regular meeting or as soon thereafter as practical.”

The section also provides that the Secretary shall no less than seven days immediately prior to balloting either: mail a notice to all members or post in the Lodge the name, city and state of each applicant, his business, name of the proposer, and the date of the meeting at which action may be taken on the application.

After the report by the Membership Committee, or a majority thereof, and after a due notice has been given, a ballot for admission of the candidate shall be taken, unless the applicant is unworthy....

Interviews and Investigations:

Depending on the size of the Lodge and the number of new members that are being recruited a small team of interviewers should be recruited. The interviews should be well versed in the operation of the lodge and the overall operation of the Order.

The Committee is authorized under Section 13.080 of the Laws of the Order to interview candidates for membership in the Lodge. The Committee shall carefully examine the character of all applicants for membership. The Committee shall require that applicants personally appear before the Interviewer.

The purpose of a good investigation/interview is to assure that new applicants will be well-informed of the objectives of membership in the Elks and that they will be socially and fraternally compatible with other Members of the Lodge.

Applicants gain a clear understanding of their duties and responsibilities and a long-term appreciation for the publication “What it means to be an Elk.”

Indoctrination/Orientation:

The Committee is responsible for acquainting candidates with the history of the Order, its benevolences and rightful place in society. The program should be presented in a session attended by the Sponsor, and Spouse of

the candidate. It should combine the program materials of the Grand Lodge with information concerning the programs of the CHEA Association and Lodge. Impressively presented, the program will give the candidate the information and motivation to become an active member in the Lodge.

Sponsor/Proposer and Mentor : It is up to the Lodge to convey to the members that a Sponsor/Proposer is a very important part of the entire membership process. He is the relative, spouse, friend or co-worker of the candidate. The Sponsor/Proposer **should not be the person your candidate met at a social event once, gives him/her an application and never sees the candidate again.** As such the Sponsor/Proposer should be the member and Mentor that holds the new member's hand from the time he gives him/her an application through his/her initiation and integration into the Lodge.

(Some Lodges have Mentor programs that have been successful.)

Membership Retention/Lapsation:

Retaining members is directly related to growth in membership. The program demands attention to potential loss through non-payment of dues. It is up to the Committee to address the reasons for the loss of a member. (Usually it is the loss of Interest by the member.) A strong reinstatement program can be a source of membership gain.

The Lapsation Chairman should constantly stay abreast of the delinquents in their lodge. It is important that the delinquent lodge members be contacted 30 days after they are identified as lapsed members and on a regular basis throughout the year. The Secretary can assist the Lapsation Committee Chair in this process by contacting the individuals by mail, email or phone. He/She should try to find out the reasons why the member is delinquent and report this to the Committee at the next meeting.

The Stray Elk program:

A "***Stray Elk***" is a **paid-up** Member of a Lodge who now resides within the jurisdiction of another Lodge. An individual who has taken an Absolute Dimit or has been dropped for the nonpayment of dues is **not** a Stray Elk.

The Stray Elk program is aimed at extending friendships by inviting Stray Elks to continue their participation in Elkdom through your Lodge programs. A successful Stray Elk Program can curtail the dwindling interest that leads to a loss of members.

Stray Elk printouts are sent to each Lodge semi-annually by the Grand Lodge Membership Committee. The Secretary of the Lodge should have the printout.

Plus +1 Program:

The +1 Program is designed to assist Lodges and Associations in addressing the Order's continuing decline in membership. The program is built around four Lodge-based strategies.

- Build the relationship between the Member and the Lodge.
- Instill pride in Membership.
- Focus all Lodge activities on recruitment, activation and retention
- Develop Lodge-State-Grand Lodge partnerships.

The goals remain the same: Actively Recruit, Reduce Lapsation to 2% or less, Recruit Members in an amount equal to 10 percent of the current membership and effectively use the Stray Elk program to identify and involve Members who have moved into other jurisdictions.

Zero Delinquents Program:

The Zero Delinquents program is to augment the +1 program. It too is focused on getting the member back into the Lodge. The Lodge could contact the Member's Sponsor and have him or her make a face to face contact with the delinquent member to encourage the member to pay their dues. If the sponsor is not available have a member in the Lodge make a friendly house call to the delinquent member and ask them the Big Question: "Can I get a check for your Lodge dues?"

These Members are our friends. Be nice to them. Explain to them that the Lodge needs their help to continue their many good works within the community and nationwide. If you can convince the Member the Lodge needs them and wants them they will probably stay with the Lodge.

If the delinquent Member does not desire to pay their dues, give them something. We don't want to go away with the delinquent member unhappy with us. They are still a member and our friend. Give them a "Flag decal" or other item, and ask them to advertise for the Elks.

If the member does pay his or her dues, encourage the person to come to the next Lodge meeting, dinner or social. If they hesitate to come to a dinner, offer to pay for it. Of course the premise is to get the Member back into the Lodge and possibly get involved.

(In the case of Elderly members, this is a good time to check on their welfare and determine if they need assistance or help). **See Statute 14.310*

Community Awareness (Lodge Activities and Public Awareness)

Lodge Activities have a tremendous effect on Lapsation/ Member Retention. Given good business management, every Lodge with enthusiastic and creative Officers, good leadership, interesting , well planned Lodge meetings, stimulating programs, and varied social events should never have a Lapsation/Membership Retention problem. A happy membership is a part of an active, successful Lodge and the club. A happy member will take part in activities and assist the Lodge to grow in membership and to expand its good work.

Community Activities: (Community Awareness and Public Relations)

No factor is more important to the welfare of the Lodge than an outstanding image in the community. Gaining membership requires having an acceptable Lodge facility that will attract use and well-conceived community-service programs. Hosting Events such as Law Enforcement Night or Eagle Scout Awards night that are well publicized and reported by the local news media strengthens the image of the Lodge. It brings members of the community into the Lodge and in turn brings in perspective Members.

Grand Lodge Membership Incentives Program (Recognizing Achievement) :

The Grand Lodge Membership Incentives Program is designed to recognize Members and Lodges that excel in retaining and recruiting members.

1. **Grand Exalted Ruler's Award Pin**
 - a. Recruit any combination of 3 new or reinstated members.
 - b. Lodge Secretary submits pin request to Grand Secretary.
2. **Elks Watch Award**
 - a. Recruit any combination of 11 new or reinstated members.
 - b. Lodge Secretary submits request to Grand Lodge Membership Committee each time 11 members are recruited.
3. **Elks Clock**
 - a. Recruit any combination of 33 new or reinstated members. (One Clock per year)
 - b. The Lodge Secretary sends a list of recruiters to the Grand Lodge Membership Committee to request a clock each time 33 Members are recruited
4. **Top Recruiter: Airfare to Grand Lodge and four nights lodging.**
 - a. Top recruiter in each Grand Lodge membership area.
 - b. Lodge Secretary lists name of top Lodge recruiter on line 21 of the Lodge Annual report Page One.
5. **New Lodge Development Leader**
 - a. Airfare to Grand Lodge and four nights lodging.
 - b. Lodge member who provided leadership in the formation of a new Lodge. (Past two year period)
 - c. Nomination by letter to GL Sponsor by May 15 who approves and submits to GER for selection.
6. **ER +1**
 - a. Lodge has a membership gain of at least one April 2013.
 - b. Submit Lodge Annual Report.
7. **Trip to next Grand Lodge Convention**
 - a. Qualify for GER Pin, Elks watch or clock, or ER+1 Program. Two trips awarded from GER Pin recipients; 1 from Elks watch/clock recipients and 1 from ER +1 Lodges.
 - b. Submission of GER Pin or Elks watch/clock request or Lodge has a membership gain as shown on Lodge Annual Report.

8. GER Class Certificates
 - a. Initiate New Members during September and October 2011.
 - b. Send class information to CHEA Membership Chairman and complete line 21 on Nov.1, Grand Lodge Membership Report.
9. Lapsation Program
 - a. Lodges with 2% or less Lapsation receive a Citation of Achievement from the GER.
 - b. Submit Lodge Annual Report
10. Percent membership gain
 - a. Lodges: First, Second and Third highest percent of the membership in each of the six GL Areas are awarded plaques. State Associations: Three States with highest membership gain are awarded plaques. First Place: State Chairperson awarded airfare to Grand Lodge.
 - b. Submit Lodge Annual report.

***Section 14.025 of the Laws of the Order was added at the 2011-2012 Grand Lodge Session. A Lodge may provide in its bylaws for a reward to a Member who recruits a new Member if that new Member remains a Member in good standing for at least one Lodge year following Initiation.**

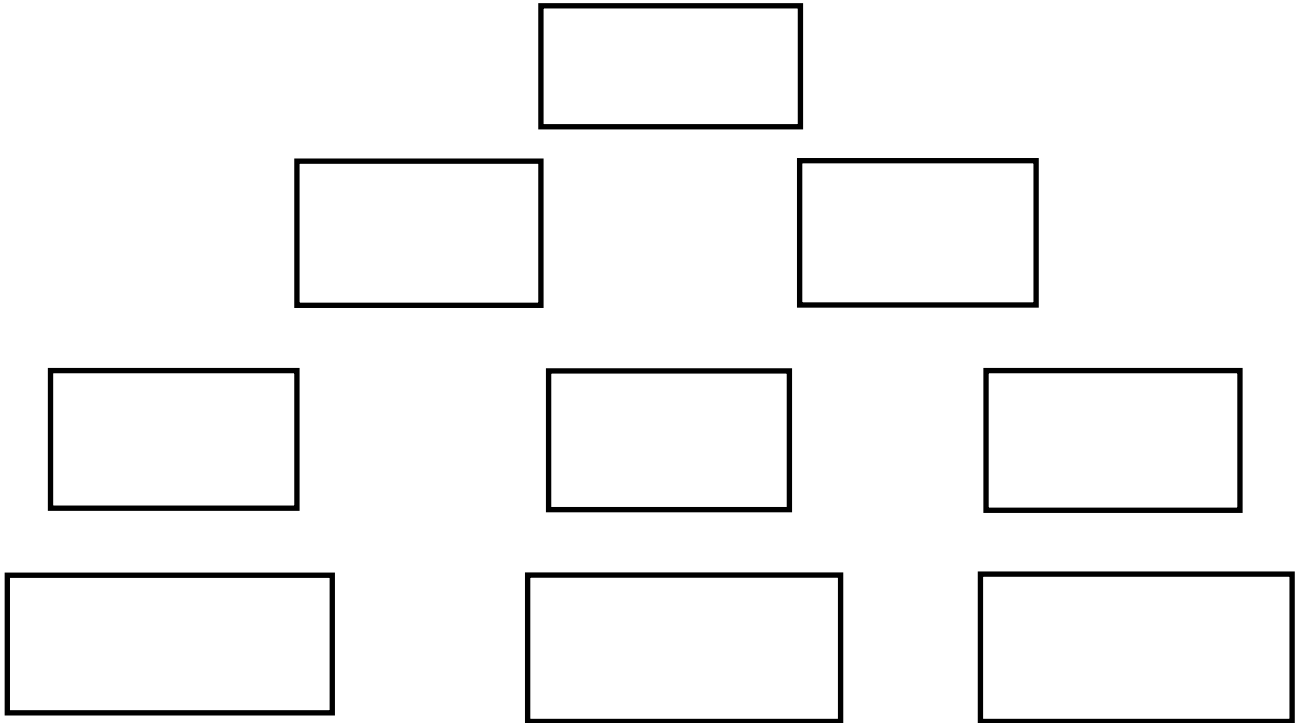
SUMMARY:

This Manual should be used to assist in the accomplishment of attaining the goals set forth in the California-Hawaii Elks Association President's Program for 2013-2014.

This Program Manual was prepared as a guide and a tool to assist the District Membership Chairman and Lodge Chairmen, and to encourage Local Lodges to set up a well-planned Membership program that will result in an overall increase in Membership.

The following Organizational Chart is a guide for Local Lodges and can be changed to fit any size lodge:

**MEMBERSHIP MANAGEMENT TEAM
ORGANIZATIONAL CHART**



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