

MEMBERSHIP RETENTION

Revised June 2009

I. OBJECTIVES AND RESPONSIBILITIES

Conserve the membership within the Chapter.

II. ORGANIZATION

A manager appointed by the Vice President of Membership will head the Membership Retention Committee. The committee manager reports directly to the vice president.

III. GUIDELINES

- Meet with the former manager to obtain records and discuss duties and responsibilities.
- Appoint additional committee members as necessary. (Attachment A)
- Prepare the objectives, goals and budget for the year. (Attachment B)
- Manage the functions of the committee.
- Submit status reports and recommendations to the vice president for reporting to the Board of Directors if unable to attend meeting. (Attachments C & D)
- Attend the monthly Board of Directors meetings as necessary.
- Read and become familiar with the Constitution and Bylaws.

IV. PROCEDURES

- Maintain liaison with members to see that they are properly oriented to chapter activities, are active in programs, and that membership conservation is achieved.

- Distribute "New Member Packets" to each new member at the orientation meeting, which are held at every dinner meeting. The packets may include a cover letter, newsletter, list of officers and committee managers, programs and workshops schedules, and other chapter information. (Attachments H, I, &J).
- Conduct New Member Orientation Meetings at the lunch meetings as needed throughout the year. Assist the new members in becoming involved in chapter functions. (Attachments F & G)
- Order membership and officer pins as necessary. Obtain check from Treasurer. (Attachment E)
- Mail membership certificate and pin when received from headquarters with a welcome cover letter. (Attachment L)
- Maintain communication with ARMA International regarding chapter membership lists. Match International list with membership lists, to obtain list of persons that have not renewed membership.
- Send a re-minder letter or make a personal phone call to members that have not renewed. (Attachment K)
- Keep good communication with Membership Growth Committee and Resource Directory Committee Managers, assisting where needed.

V. FINANCIAL

All funds received from an ARMA Houston Chapter-sponsored event or project should be turned in to the ARMA Houston Chapter Treasurer for handling. Under no circumstances are ARMA Houston Chapter VP's, Committee Managers, or Committee Members authorized to split, disburse, or retain monies for expenses incurred out of the funds collected from an ARMA Houston Chapter-sponsored event or project. The ARMA Houston Chapter Treasurer, upon the presentation of a completed check request form and receipt, should pay all expenses from an ARMA Houston

Chapter-sponsored event or project.

VI. ATTACHMENTS (not included on web site)

- A. Suggested Committee Member Assignments
- B. Budget
- C. Quarterly Report
- D. Monthly Report
- E. Check Request
- F. New Member Orientation Meeting Procedures
- G. Sample letter of invitation for New Member Orientations
- H. Sample letter to re-designations
- I. Sample letter to new members from President
- J. Sample letter to new members
- K. Sample letter to expiring members
- L. Sample Chapter Welcome Letter