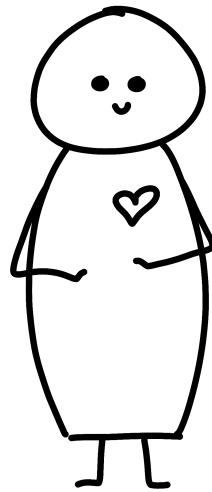


Charitable Gift Planners Councils Member Engagement Handbook

Created June 14 by the participants of the
2022 Virtual Council Leadership Summit

And Amanda Lea Kaiser at SmoothThePath.net



Engagement feels GREAT!


 worth value energized important  MAKE diff In sync  Accepted motivating 
 Trust Heard renew Life Giving Valued Belong Success Fulfilling passion Energizing Rewarding
 Fun! Fun Exciting
 Welcomed  New Quality Fun Renewed  happy

Not being engaged doesn't

Lonely outside chance opportunity alone alone uncomfortable alone
 I want to go home   Lonely Fine awkward  ?...!!! Anxious ?
 Excite odd  Awkward opportunity

Engagement is good for members because

1. Engagement feels great
2. Engaged members use the benefits of their membership
3. Professionals are lonely, and the feelings of belonging that come with engagement tamp down the loneliness

Engagement is good for associations because engaged members:

Volunteer, give input, participate, step up when you need them, ask questions, raise their hand, attend events, contribute ideas, attend sessions, attend meetings, participate in programs, help others, bring others, are responsive, lead, give, help, have a sense of humor and a genuine personality, show up, share ideas, say yes, connect and follow up, suggest programs, create, innovate, advocate, find sponsors.

More Member Engagement Resources

- [Host Your Own Meaningful Networking Events](#) - *report pdf* (or how to engage via Zoom)
- [The New Member Engagement Study](#) (new report will publish this Fall)
- Elevating Engagement: Uncommon Strategies for Creating Thriving Member Communities (publishes Valentine's Day 2023 - email book@elevatingengagement.com to get notified.)

Engaging Technology

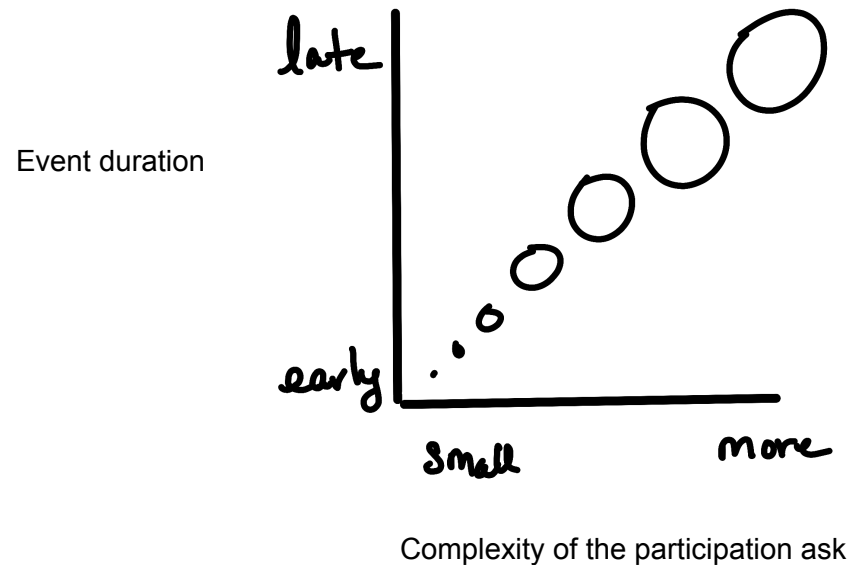
- [Piccles](#)
- [Jamboard](#)

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#1: Prime Members to Participate

Start with little asks first and work up to more substantial participation



Eliminate the participation gap by

- Skipping the long intros and get people participating right away
- Start with little asks for participation first - one-word answers, a nod, a raised hand, a doodle
- Ask questions that have no wrong answers, i.e., Would you like to have a dragon or be a dragon and why?
- Give people many ways to participate how they feel most comfortable. Some people are okay with hopping off of mute and speaking in front of a big group, and others would rather contribute in the chat box.

These are some of your favorite icebreaker questions.



#2: Provide Great First Impressions

First impressions are essential to get right because

1. Members form first impressions in just 3.5 seconds.
2. First impressions color members' subsequent interactions with your association.

What are the not-so-great first impressions that happen in communities?

- Members were snobby
- No one reached out
- Too many buzzwords
- Cliques experience
- Not welcoming
- Everyone seemed to know each other already
- Insular
- I didn't feel welcomed or valued
- Demanding I get involved
- Too cliques
- Clubhouse feel
- Silos
- Not noticed or greeted
- No one else seemed engaged either

What are all the contact points when members have first impressions of an association?

- | | |
|---|--|
| • Website | • Response to registration |
| • Joining, attending an event | • Joint event with another association |
| • LinkedIn comment or DM | • Introduction at meeting |
| • Welcome email message from membership chair | • Email |
| • Registration for lunch meeting | • In-person program |
| • Finding the meeting location | • Communication clarity, |
| • Email invitation to events | • Sign-up |
| • Leaving a voicemail | • Survey |

- Meeting a board member in the community
- Welcome phone call
- How other people are interacting with each other

#3: Prioritize Experiences

Formula for member engagement

$$\text{Value} + \text{Experience} = \text{Engagement!}$$

For example, these are the values and experiences from shopping at your favorite store.

Value	Experience
Tangible, Good product at a fair price, always found what I want, great products, great/reasonable price, quality, great selection, reliable,	<i>Intangible, someone greets me by name, feeling welcome, wide-open spaces, other people are there enjoying the experience too, bright and sunny, smells good, clean, browsing experience, comfort, like the music selection and vibe, surprised every time, staff was happy which showed the culture was good, friendly, staff remembered me, personally appreciated, warmth, made me feel like I was on an adventure, good music, smell of coffee, the smell of books, sense of personal discovery, feeling welcome and comfortable, I can explore on my own, smiles, friendly faces, feeling at ease, attentive staff but no overbearing, comfortable chairs</i>

There's a race to the bottom for value. Value you can buy online. Value you can always get for cheaper. But great experiences are rare and important.

Experiences drive emotions, and emotions drive decisions.

Experiences → Emotions → Decisions

The decisions to...

- Join
- Renew
- Participate
- Contribute
- Collaborate
- Volunteer
- Attend
- Buy

How Charitable Gift Planners Councils Can Engage Members

Your Name	Concept Working Name	Description	“Yes and...” (Your Name)
Steve Herlich	Warm follow-up	Friendly phone call (or email) to first-timer after the event thanking for attending and asking for impressions	
Sam Sanker	Warm welcome	Divide the total numbers of board members out amongst the board and have each member send personalized welcome messages to each new council member	Carrie Ogami: Great idea and ask them what they hope to get from being on the council Jessica Bursi: Yes and ... sometimes I'm wary of calls from people I don't know who seem aggressively friendly. BUT if they were someone I knew of and/or in my sector (e.g., higher ed, arts, etc.), that would feel more welcoming.
Ann Kolakowski	Follow-up phone call	Call after first interaction to follow up - personal outreach, give cell phone and email of member (not general office)	Melissa Pence - Yes and personally invite to your next event.
Mike Bell	Assign Mentor	Assign a Council member or Board Member to follow up with the guest/new member. Call and invite to future programs, etc.	Steve Herlich: Yes, anything we can do to make things one-to-one! Lauren Michel: I like this, and it could be industry-specific (e.g., a gift planner partnered with a gift planner, etc.)
Darcy Weaver	Acquiring New members	Personal invitation from current member Greeting new attendee at meeting Answering questions Introducing new attendee to others Call after meeting	
Melissa	New Member	New Member Spotlight in council	Joe Martellaro: Love this; easy to do if you have

Pence	Welcome	communication, enewsletter	a newsletter. Ann Kolakowski: Maybe a shoutout on your Council LinkedIn page if you don't have a newsletter?
Anne Calder	Warm welcome	Personal visit with new members by a board member; introduction of new members to the group; regular communications about benefits; creative connections between members; mentor relationships; survey members for their ideas/wishes for content/experiences	
Lisa Chmiola	Personal invitation	Members personally invite a guest to attend an event with them, sharing the value of membership with them	Ann Kolakowski: Yes and incentivize by giving members a "discount" coupon to invite one new person per program year. Maybe people who bring new folks in could be entered into a drawing (one chance for each new guest) for a fun prize at the end of the year Melissa Pence: Yes, and if there's a program fee for non-members, provide a discount or fee entry for potential members.
Carrie Ogami	Personal welcome	Call new members to welcome them to council and ask them what they hope to get out of their membership	Love this
Karen Kemble	Invite participation in small breakout rooms of virtual sessions	Early participation in a small group so not as daunting and overwhelming as with the entire group	Melissa Pence: Yes and designate a board member for each breakout that can start icebreaker conversations.
Clare Grotting	Warm and individualized welcome	Call first, and email second, welcome first-time attendees or new members to the group and explain what sdpgp is about and all of the	Melissa Pence's idea: New Member Spotlight in council communication, email

		benefits of membership. Ask questions about what they are interested in and looking to learn about. We have a membership chair and can assign an at-large member to help with this task if needed.	Ann Kolakowski - I also like the idea of opening your Zoom room early to chat and get to know each other. Easy, free, and effective!
Kathy Jordan	Introduce to another member, help make connections	Follow up and ask what member is looking for, then introduce them to someone who can help	Mike Bell: Yes, and have the “connector” continue to touch base with the member from time to time.
Lauren Michel	Personal welcome	Have the membership chair personally welcome new members by email or phone. Explain the usual course of the year and the value that the organization can add. Ask them to participate more fully as a speaker or board member (if appropriate)	Heather Chester: Yes, then President of council also welcomes new members in same way. Works great.
Anne Monell	Effective Signage	Clear signage for people to find their way to the meeting	Anne Calder: Yes! And ensuring meetings are always accessible to all. Ann Kolakowski: Agree on all points here!
Jessica Bursi	Annual Conference - Interactivity	Kick off annual conference with interactive and easy to access session that welcomes guests and allows them to engage in a low-stakes way – and Mr. Miyagi them :) into being more comfortable to participate throughout the conference - and ultimately become more engaged with both the conference and our organization.	
Carrie Ogami	Assign a buddy	Ask an old timer to be a “guide” to the new member initially to answer questions, find out more about their organization and their past experiences. It’s scary to be the new kid at	Melissa Pence: Yes and have the mentor check-in before next prog

		school!	
Simon Williams	Personal Welcome	Building off our new member welcome message (letter or email), invite new members to join a small group casual gathering with the board and select longer-term members. Consider also doing a personal shout out to any new members at our scheduled socials for all members and invited guests.	Darcy Weaver; Involving new members to a small group is an interesting idea. Would love to hear if anyone has tried it.
Steve Herlich	New member shout-out	In board meeting during membership report: phone call or text new member with group welcome	
Ed Cadogan	Welcome	New member introduction at council meetings	We do this! But sometimes new members aren't there. So we should probably call new members to tell them we will introduce them, so hopefully they will show up!
Heather Chester	Intro/welcome at entrance	Greet new attendees at the door at their first meeting; thank them for attending at completion	Katie Pooser: Yes and the phrase, "I'm glad you're here." means so much!
Steve Herlich	Program dedication	"Dedicate" a program to a member(s) who mentioned the topic in a survey. Provides recognition and encourages survey participation.	
Ann Kolakowski	Have Zoom room open early	Open zoom room before official start and offer one of the Jamboard icebreakers	Lisa Chmiola: Love this! Can it carry over when in person? Maybe large post-its around the room? Steve Herlich: Love it. Easy engagement, less formality. Carrie Ogami: Yes, love this! Post-it on white board when all together is another great idea

Joe Martellaro	Intro at meeting start and re-intro at end	Intro new/prospective members at start and then at close, re-introduce and thank for joining	
Carrie Ogami	Food	If we weren't virtual, we would definitely feed them	Joe Martellaro: our meetings are in the AM, so when in person – coffee and bagels are a must for us! Ann Kolakowski: ALWAYS food!!
Alicia Anthony	Highlighting Members and Sharing Values	New Member spotlights on LinkedIn to share member name, organization, why they joined our organization. Makes new members feel welcomed, lets other members know who is joining the organization (networking benefits!), reminds current members of our shared values. Encourage board members and members to comment and interact on LinkedIn in a more informal setting and between our scheduled meetings.	Heather Chester: Agree. Great idea. Stealing it. Sam Sanker: Great idea, Alicia! Do you mean in a LinkedIn Group? Not sure we would post publicly. But I like the idea in a LinkedIn group. We are just starting to use this. –Yes, in our organization's group only (AA) Ann: Yes! Canva is a great tool for this. Katie Pooser: yes and @ people to further engage their networks. <i>Katie, this is Sam Sanker commenting. I +1 this idea as well!</i> – <i>Definitely @ them! (AA)</i>
Bob Ferrell	Learning about our member base	Survey members to learn what THEY want to learn and not what we assume they are interested in	Joe Martellaro: Yes! We send an e-mail survey asking that very question after every meeting. Kathy Jordan: Love this idea!
Heather Chester	Follow-up	Follow-up with any prospective members or new members to gauge their impression after first meeting	Katie Pooser: Yes and have pointed questions that speak to the value their answers as someone with a fresh impression can give. Show them you're not just checking a box by connecting after the meeting.

Katie Pooser	Begin meetings with networking	We're still in a virtual format, so give members a chance to speak with no agenda.	Anne Calder: YES TO THIS. In virtual age networking is even more important. Maybe give experienced members assigned new folks they are to check in with. Lisa Chmiola: the New Orleans AFP chapter held some of these sessions early in the pandemic separate from the seminars and they were well attended to simply network.
Katie Pooser	Market to Major/Principal Gift Officers	Encourage members to bring their colleagues to specific programs (i.e., digital marketing—annual fund, CFO for estate admin or trusts overview)	Lisa Chmiola: we had great luck with this when I was in the Houston council.
Melissa Pence	Member Invitations	Invitation to serve on a council sub-committee	
Ann Kolakowski	Nametag callout	Subtle way to mark nametag with first-time visitors so board (and everyone) can engage	Steve Herlich: Yes and be sure to communicate that expectation to the board!
Ann Kolakowski	Swag	Offer first-time participant council branded item with FAQs inside	Lisa Chmiola: years ago, Houston council had tote bags, paper, pen at first meeting Anne Calder: Moleskines go over great. Ann Kolakowski: I want a Moleskine! :D
Ann Kolakowski	Intro first-time folks	Have first-time visitors introduce themselves (I'm actually not sure about this one - we do it but it really puts folks on the spot in a crowded room of strangers)	
Joe Martellaro	Welcome e-mail/call	Have one or more Board members call/e-mail new members to welcome	
Katie Pooser	Have a member	Before jumping into the specific topic at hand for	Lauren Michel: this is a great idea!

	share a donor/gift story with the group	the seminar, have a member share a recent donor engagement story. I think we'll see lots of nods and light bulbs. People will relate to the work, what brings us together en masse.	Karen Kemble – cool idea. I like this, celebrating a “win.” Kathy Jordan - Stories always help get people engaged - good idea!
Ann Kolakowski	Greeting committee	Station folks at the door to say hello to everyone as they enter after registration so they can engage with new folks	Kathy Jordan - we do this and it works!
Ann Kolakowski	Seating	Have board members sit at different tables so they don't fall into cliques and can engage with new folks	Anne Monell: totally agree! Steve Herlich: Yes and remind board of their responsibility to be ambassadors, introduce people Karen Kemble – like this idea
Katie Pooser	Show how we use surveys	We collect survey results after all programs, share with the membership how we are using their responses. I think this will encourage thoughtful participation and help new attendees see that we do value input and new ideas.	Anne Monell: I would love to see a meaningful survey, ours doesn't feel actionable Heather Chester: Yes, just implemented this this year.
Ann Kolakowski	Door prize	Have a door prize or two at each meeting/event - make it fun!	Joe Martellaro: Love this, Ann. Each board member can contribute swag from their org. OR, allow the meeting sponsor to do a giveaway.
Anne Monell	Quick orientation	after/before a meeting give new members a quick orientation of resources, people, ways to get involved	
Anne Monell	Contact person	At a meeting each new members has one person who is their “go-to” for questions, or just to say hello!	
Heather Chester	Relax	We try to keep our meeting a little less formal so that all participants feel like they can participate, ask questions, comment, etc. during Q&A time	

Katie Pooser	Help the speaker with engagement ideas	Work with the speaker prior to their presentation to help them create little participation opportunities.	
Lisa Chmiola	Speaker host	Invite members to introduce speakers at event, assist with their hospitality, etc.	Anne Calder: Love this idea. Spreads out participation at each meeting.
Ann Kolakowski	Buddies	HAVE registration indicate whether or not this is their first event; if so, assign them to a “buddy” to look out for them and make sure they feel welcome	
Mike Young	Speed meeting	2 to 3 minutes with each member - set a timer so that each person needs to chat with a new member. Prime the members with 2 or 3 questions that are icebreakers - then each member shares their 3 favorites, and each favorite needs to be from a different person.	

Member Engagement Recipes

Warm Follow-Up

Names of all the contributors: Carrie Ogami, Kristi Gallup, Jessica Bursi

Brief explanation: Friendly phone call (or email) to first-timer after the event thanking for attending and asking for impressions

What are the steps to implement this idea?:

1. Track new (and lapsed) attendees at event, etc.
2. Assign who is going to call or email - be it membership committee, rotation of board members, by industry segment. Helpful if the caller attended the same event.
3. Develop a script based on attendance, member history, their organization history - be prepared for an actual call or to leave a voicemail.
 - a. "Glad to have you with us at the event."
 - b. "If you'd like to get more involved, we'd love to have you."
 - c. "We'd love to get you more involved."
 - d. "How did you find out about us?"
 - e. "What did you think of the event?"

Is there a segment of membership this recipe works best for? (*i.e., new members, first-time attendees, students, long-time members, etc.*)

- *New Members;*
- *First-time attendees;*
- *Attendees who haven't joined as members;*
- *Lapsed members*

When would this concept be used? (*i.e., during virtual meetings, at the annual, when a member renews, on our website, etc.*)

- Following an in-person or virtual event

How would you adapt this concept to virtual if it is an in-person idea? Or adjust it to in-person if it is a virtual idea?

- Easy to adapt for virtual or in-person

Is this concept best for small, medium, or large councils?

- This is scalable; you may need more callers for a larger council. This is a good problem to have :)!

Implementation considerations

- Who is responsible for implementing this idea?
- Will it cost money? How much?
- Is time a consideration?
- Will there need to be training?
- Is additional technology needed? (would you have to buy something new, and what kind of technology would it be?)

What are the outcomes of engaging members in this way?

- This provides a warm welcome, generate positive feeling towards organization; eventually have these folks become welcome committee members themselves.

Why do you love this idea?

- It creates a warm & welcoming experience that itself is valuable

New Member Welcome

Names of all the contributors: Simon Williams, Ann Monell, Alan Paberzs, Kathy Jordan

Brief explanation:

New Member Spotlight in council communication, e-newsletter

If you don't have a newsletter, promote new members via LinkedIn Group (if one is created)

Promote new members in the newsletter, shout outs for new members at events/programs, Board members reach out to new members to introduce/welcome themselves.

What are the steps to implement this idea?:

1. Get a list of new members — know who they are
2. Gain permission to spotlight new members

3. Identify a brief list of questions to ask of new members to gather content for the new member spotlight. Fun fact, something interesting about themselves.

Is there a segment of membership this recipe works best for? (*i.e., new members, first-time attendees, students, long-time members, etc.*)
New members.

When would this concept be used? (*i.e., during virtual meetings, at the annual, when a member renews, on our website, etc.*)
Follow new member enrollment.

How would you adapt this concept to virtual if it is an in-person idea? Or adjust it to in-person if it is a virtual idea?
Take time during in-person programming/socials to introduce new members.

Is this concept best for small, medium, or large councils?
Any size council

Note: we could offer swag for new members; raffle prize (free program for new members; free scholarship, Starbucks gift card)

Implementation considerations

- Who is responsible for implementing this idea? Membership Committee? Communications Committee? Administrator? Monthly, quarterly frequency?
- Will it cost money? How much? Administrator facilitates sending —
- Is time a consideration? — yes! Programs, National Conference, Highlight sponsors, social media accounts.
- Will there need to be training? — Depends on technology used.
- Is additional technology needed? (would you have to buy something new, and what kind of technology would it be?) MailChimp, Constant Contact

What are the outcomes of engaging members in this way?

Why do you love this idea?

Warm Welcome

Names of all the contributors: Lisa M. Chmiola, CFRE; Lauren Michel; Sam Sanker; and Stacey Winkelbauer

Brief explanation: Welcoming/hospitality committee: welcome new members, solicit questions, and introduce them to fellow members. The goal is for new members and guests to feel welcomed and included in the community.

What are the steps to implement this idea?:

1. Determine logistics (Who will do what? Separate committee? Full board? Subset of board members?)
2. Assign roles to committee members/ask new members to join committee
3. Provide branded welcome gift, introduce members at meeting, and provide ongoing resource to new members

Is there a segment of membership this recipe works best for? (*i.e.*, *new members*, *first-time attendees*, *students*, *long-time members*, *etc.*) First-time attendees/new members; Engage long-time members as those welcoming first-time attendees/new members.

When would this concept be used? (*i.e.*, during virtual meetings, at the annual, when a member renews, on our website, *etc.*) On a rolling basis, dependent on how often councils convene (monthly; quarterly; annually)

How would you adapt this concept to virtual if it is an in-person idea? Or adjust it to in-person if it is a virtual idea?

- Virtual version: Public welcome at beginning of program; private message in chat; social media call-outs
- In-person: Public welcome at beginning of program; introduce to one other person at meeting; Same-table lunch seating

Is this concept best for small, medium, or large councils? Any size council, adapted accordingly to reflect the size of the council (NOTE: Good engagement opportunity for Past Presidents)

Implementation considerations

- Who is responsible for implementing this idea? Membership Chair
- Will it cost money? How much? For “swag”/welcome item and/or meeting discounts
- Is time a consideration? Always, but also ideally minimal
- Will there need to be training? Minimal; small number of talking points
- Is additional technology needed? (would you have to buy something new and what kind of technology would it be?) None

What are the outcomes of engaging members in this way?

- Members who are more likely to continue to attend council meetings
- Deeper engagement with a desire to engage others
- More likely to renew membership
- Inspired to join council committee/board/CGP
- Empower more individuals to be internal advocates for planned giving within their organizations and their broader communities

Why do you love this idea?

Opportunity to model ideal professional behavior and engage in community building within the planned giving community itself (Self-care for councils and chapters!)

Introduce to another member – starting with phone calls

Names of all the contributors: Anne Calder, Grant Whitney, Jennifer Milburn

Brief explanation:

Intentional connections between members to increase engagement and commitment level to organization and profession.

What are the steps to implement this idea?:

1. Consider different ways to provide levels of welcome based upon member preferences for personal interaction, including Covid vaccination status.
2. Start with a phone call to a new or other member--helps take “temperature” for the other person’s desire for connection.
3. End with “Look for me at the next event!”

Is there a segment of membership this recipe works best for? (*i.e., new members, first-time attendees, students, long-time members, etc.*) Newer members needing connection to professional networks.

When would this concept be used? (*i.e., during virtual meetings, at the annual, when a member renews, on our website, etc.*) New members called first; drive calls prior to annual conference or events

How would you adapt this concept to virtual if it is an in-person idea? Or adjust it to in-person if it is a virtual idea?

Is this concept best for small, medium, or large councils? Any size council.

Implementation considerations

- Who is responsible for implementing this idea? Board members and general membership
- Will it cost money? How much? No
- Is time a consideration? Time constraints of volunteer callers
- Will there need to be training? Light bullet points for conversations and then method to convey information back to council if needed--Google doc would work great
- Is additional technology needed? (would you have to buy something new and what kind of technology would it be?) Phone

What are the outcomes of engaging members in this way? Membership retention, increased pool of future volunteers

Why do you love this idea? Cheap and easy!

Annual Conference - Interactivity

Names of all the contributors: Mike Young/Reno, NV; Joe Martellaro/Susquehanna Valley, PA; Alex Castaneda/San Antonio

Brief explanation: Concept for less-comfortable attendees to ease into participating in program throughout the conference. We are assuming this is an in-person event at the local council level for purposes of this exercise.

What are the steps to implement this idea?:

1. Identifier on back of nametag to help people understand the concept – 3 questions to break ice (what animal would you be? Favorite hobby?) MC asks all guests to write down the answers to the three questions for themselves; refer back to them throughout the event.
2. Seed the breakout sessions with board members at each; begin each breakout with asking various guests to answer one of the 3 questions.
3. Also assign board members to various tables at full sessions, meal events, etc. for same purpose.

Is there a segment of membership this recipe works best for? (*i.e., new members, first-time attendees, students, long-time members, etc.*)

Works well for new/prospective members, those who are a bit more shy in groups (regardless of their member status)

When would this concept be used? (*i.e., during virtual meetings, at the annual, when a member renews, on our website, etc.*) Designed to be used at large, annual conference, but could be adapted for monthly educational meetings (especially for large councils that get larger attendance)

How would you adapt this concept to virtual if it is an in-person idea? Or adjust it to in-person if it is a virtual idea? Could do breakout rooms (as we are now).

Is this concept best for small, medium, or large councils? Can be adapted for any size.

Implementation considerations

- Who is responsible for implementing this idea? Board/conference planning committee
- Will it cost money? How much? Shouldn't cost anything.
- Is time a consideration? Need to monitor this so it doesn't get away from you.
- Will there need to be training? Shouldn't be necessary with right moderator/MC.
- Is additional technology needed? (would you have to buy something new and what kind of technology would it be?) Only if done virtually; even still, Zoom and other platforms have breakout capability.

What are the outcomes of engaging members in this way? Stronger engagement in both the program and with the council, because they participated and felt welcome.

Why do you love this idea? Because participants come away with a better and more involved experience. It engages people on a personal level, not simply a professional level. Helps people and the council grow networks.

New Member Shout Out

Names of all the contributors: Steve Herlich, Karen Kemble, Melissa Pence

Brief explanation:

In board meeting during membership report: phone call or text new member with group welcome

What are the steps to implement this idea?:

1. Membership chair provide info, contact info
2. Draft suggested text or call remarks, including testimonial

Is there a segment of membership this recipe works best for? (*i.e., new members, first-time attendees, students, long-time members, etc.*) New and renewing members

When would this concept be used? (*i.e., during virtual meetings, at the annual, when a member renews, on our website, etc.*) Monthly or during board meeting

How would you adapt this concept to virtual if it is an in-person idea? Or adjust it to in-person if it is a virtual idea? Texting works either way

Is this concept best for small, medium, or large councils? Works for all sizes

Implementation considerations

- Who is responsible for implementing this idea? Membership chair takes the lead but all board members would need to help
- Will it cost money? How much? No
- Is time a consideration? Yes, but could break up the new members among the board members
- Will there need to be training? No, especially if script developed in advance
- Is additional technology needed? (would you have to buy something new and what kind of technology would it be?) No

What are the outcomes of engaging members in this way? Making them feel welcomed and part of the group; what their areas of expertise are so could know how to engage them; help board members know who is new so they can reach out at other events;

making new members feel welcome to the field of planned giving if they are new to the role

Why do you love this idea? See above outcomes and easy to implement– not costly or technologically difficult

Have Zoom Room Open Early

Names of all the contributors: Danny Schenker, Brad Harris, Heather Chester

Brief explanation: Open the Zoom room early to allow participants an opportunity to network and talk amongst themselves, similar to how people would network in a room in an in-person setting

What are the steps to implement this idea?:

1. Appoint an individual to facilitate conversation and keep time
2. Have an ice breaker w/ introductions
3. Dedicating time in the agenda to network
4. Break out groups (Zoom) tables (Remo)

Is there a segment of membership this recipe works best for? (*i.e., new members, first-time attendees, students, long-time members, etc.*)

- Everybody, especially those new to the group and allied professionals

When would this concept be used? (*i.e., during virtual meetings, at the annual, when a member renews, on our website, etc.*)

- During virtual meetings

How would you adapt this concept to virtual if it is an in-person idea? Or adjust it to in-person if it is a virtual idea?

- Having dedicated network time at in-person meetings

Is this concept best for small, medium, or large councils?

- Better for medium/large councils

Implementation considerations

- Who is responsible for implementing this idea?
 - Council leadership
- Will it cost money? How much?
 - No
- Is time a consideration?
 - Yes. Extra 10-15 minutes at the beginning of virtual meetings
- Will there need to be training?
 - Potential software usage training
- Is additional technology needed? (would you have to buy something new and what kind of technology would it be?)
 - No. Virtual meeting software is sufficient.

What are the outcomes of engaging members in this way?

- More interaction (member to member) (member to speaker)

Why do you love this idea?

- Yes, making the best of a virtual setting and humanizing technology

Greeting Committee

Names of all the contributors: Dahlia Latif, Kathryn Sides, and Mike Bell

Brief explanation: Station folks at the door to say hello to everyone as they enter after registration so they can engage with new folks.

What are the steps to implement this idea?:

1. Have members sign up for dates to serve as Greeter.
2. Give Board members a heads up that you may have new comers sit with them.
3. Greet visitors at registration and help them to find a seat, introducing them to a few people at that table.

Is there a segment of membership this recipe works best for? (*i.e., new members, first-time attendees, students, long-time members, etc.*) *New members and first-time attendees.*

When would this concept be used? (*i.e., during virtual meetings, at the annual, when a member renews, on our website, etc.*) *In-person meetings; member renews;*

How would you adapt this concept to virtual if it is an in-person idea? Or adjust it to in-person if it is a virtual idea? if virtual, the greeter could direct chat the individual.

Is this concept best for small, medium, or large councils? Councils of all sizes.

Implementation considerations

- Who is responsible for implementing this idea? Membership Chair
- Will it cost money? How much? No
- Is time a consideration? Very little
- Will there need to be training? Perhaps a short position description or check list of what to do or give the guest
- Is additional technology needed? (would you have to buy something new and what kind of technology would it be?) No tech, unless virtual meeting; Owl (video robot camera, about \$1,000) or Zoom

What are the outcomes of engaging members in this way? Engages the greeter with a defined role and way to contribute - and not long term commitment! New member or visitor immediately knows a few individuals.

Why do you love this idea? Creates opportunity for the greeter to also follow up with a call and offer to make connections, answer questions, etc.

Quick Orientation

Names of all the contributors: Lori Dunaway, Pat Swanson

Brief explanation: (after/before a meeting give new members a quick orientation of resources, people, ways to get involved)

What are the steps to implement this idea?:

1. Notification of a new member (or membership renewal) shared with the individual who will be performing the quick orientation.
2. Coordinate when the orientation will take place and how - Zoom, email, coffee, etc.
3. Written orientation materials for new members to take home - quick reference (hard copy) including membership benefits, committee chairs, contact info for officers, calendar, membership details that are particular to each council.

Is there a segment of membership this recipe works best for? (*i.e., new members, first-time attendees, students, long-time members, etc.*) *New members and first-time attendees*

When would this concept be used? (*i.e., during virtual meetings, at the annual, when a member renews, on our website, etc.*) When member joins and renews - throughout the year

How would you adapt this concept to virtual if it is an in-person idea? Or adjust it to in-person if it is a virtual idea? Regardless of online or live activity, all new member welcome/orientation materials should be available in hard copy and video. This works for those councils that do not have a website/facebook presence so this would be something you could just send via email.

Is this concept best for small, medium, or large councils? All sizes

Implementation considerations

- Who is responsible for implementing this idea? Membership Chair who utilizes other talent/resources within the membership.
- Will it cost money? How much? Using a smartphone to video would be a low cost option. Quick reference guide could just be printed on regular paper so also - a low cost option.
- Is time a consideration? Of course, for an all-volunteer council - working with their calendar would have to be considered.
- Will there need to be training? Not for the low-tech options
- Is additional technology needed? (would you have to buy something new and what kind of technology would it be?) Only if the council wants to go high-tech, they may need to invest in upgrades.

What are the outcomes of engaging members in this way? Easy access to important information - feeling included and having the ability to go back to review information

Why do you love this idea? Easy, inexpensive

Contact Person - Ambassador

Names of all the contributors: Ann Kolakowski, Ed Cadogan, and Katie Pooser

Brief explanation: At a meeting each new members or attendees has one person who is their “go to” for questions, or just to say hello! The “go-to” person will be called an Ambassador. The Ambassador will be sure the guest has the meeting registration for the following meeting.

What are the steps to implement this idea?:

1. Volunteer to coordinate members to volunteer to be ambassadors.
2. Registration asks: Is this your first event with us? Possible answers: Yes, It's been a while, welcome me back., No
3. Email from association to ambassador and new person to connect them.
4. In-person–introductions
 - a. virtual : private chats to say welcome
5. Follow up with: how was it? Forward registration for next event when it comes out.

Is there a segment of membership this recipe works best for? (*i.e., new members, first-time attendees, students, long-time members, etc.*)

New-members, first-time attendees, and long-time members who are lapsed

When would this concept be used? (*i.e., during virtual meetings, at the annual, when a member renews, on our website, etc.*)

Events and meetings–in-person ideally but virtual can work

How would you adapt this concept to virtual if it is an in-person idea? Or adjust it to in-person if it is a virtual idea?

See above.

Is this concept best for small, medium, or large councils?

all

Implementation considerations

- Who is responsible for implementing this idea? Membership committee
- Will it cost money? How much? \$0
- Is time a consideration? Initial set up will take time. Coordination before the event.
- Will there need to be training? A 15-minute conversation or short email will suffice.

- Is additional technology needed? (would you have to buy something new and what kind of technology would it be?) No

What are the outcomes of engaging members in this way?

- connections for the volunteers and new members/new attendees.
- potentially committee members and board members
- new attendees will remember the feeling of being seen and connected at the event

Why do you love this idea?

- it's easy and free and could have a big pay off
- accelerates the inclusion that will happen organically
- it's intentional and doesn't leave connection to chance

Assign Mentor

Names of all the contributors: Robert Ferrell, Clare Grotting, Darcy Weaver

Brief explanation: Pair each board with a new/er member. So that board member is assigned to pair up with the new person, introduce them to people, and generally buddy up at meetings etc.

What are the steps to implement this idea?:

- 1.
- 2.
- 3.

Is there a segment of membership this recipe works best for? (*i.e., new members, first-time attendees, students, long-time members, etc.*)

When would this concept be used? (*i.e., during virtual meetings, at the annual, when a member renews, on our website, etc.*)

How would you adapt this concept to virtual if it is an in-person idea? Or adjust it to in-person if it is a virtual idea?

Is this concept best for small, medium, or large councils?

Implementation considerations

- Who is responsible for implementing this idea?
- Will it cost money? How much?
- Is time a consideration?
- Will there need to be training?
- Is additional technology needed? (would you have to buy something new and what kind of technology would it be?)

What are the outcomes of engaging members in this way?

Why do you love this idea?

Quick Ideas You Would Like to Try Right Away

1. Jamboard
2. Start small and early with participation
3. LinkedIn new member spotlights
4. Personal phone call from Exec Committee member to welcome new members
5. Piccles
6. OWL sounds fascinating to help with hybrid meetings!
7. Icebreaker at every meeting
8. Using Jamboard and Piccles in board and committee meetings and even regular programming
9. Success stories at each meeting
10. Membership committee
11. Piccles and highlight new members on LinkedIn
12. New member mentorship
13. New member ambassador
14. Early sign on with an icebreakers
15. We use OWL, just used it at a board of trustees meeting. Worked well
16. Kahoot is great for games and quizzes
17. Begin each meeting with dedicated networking time
18. Focus on creating experiences for members that make them want to return
19. Making meetings FUN!
20. Love the idea of introducing a new attendee to a member to “shepherd” them for their first meeting.