

Brandeis

BRANDEIS NATIONAL
COMMITTEE

Handbook for Membership Leaders

Revised March 2025

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Mission Statement

Brandeis National Committee is dedicated to providing philanthropic support to Brandeis University, a distinguished liberal arts and research university founded in 1948 by the American Jewish community. Its membership is connected to the University through fundraising and through activities that reflect the values on which the University was founded: academic excellence, social justice, non-sectarianism and service to the community.

Understanding the Membership Leader Role

Membership leaders have a vital role in the success of the chapter and BNC as a whole. Leaders spearhead recruitment and retention events, new member communications, new member orientations, and life member stewardship. They also collaborate with the chapter board to achieve organizational goals. Leaders of membership set the tone for new member experiences by creating a welcoming and safe space for members to get to know the chapter and their new friends.

Their efforts take place during the membership life cycle, which is made up of four parts:

- 1. Recruitment**

Create and execute strategies to attract new members.

- 2. Engagement**

Engage members throughout the life of their membership by serving as the primary contact for membership-related inquiries and fostering community. Membership leaders are ambassadors of the chapter.

- 3. Retention**

Keep members engaged, satisfied, and in the know.

- 4. Renewal**

Develop communications for the renewal process. Keep track of important dates such as the end of the membership year and the dates of the membership mailings from National. Your goal is a renewal rate of 85-90%.

Responsibilities: General and Member Management

The primary responsibility of Membership leaders is increasing membership for the continuing growth and productivity of your chapter. It is important to work closely with programming chairs, finance chairs, and other members of the chapter board on renewal communications, retention strategies, and orientation.

General Responsibilities

- Develop strategies to recruit new members.
- Enroll members.
- Review weekly membership reports.
- Plan a calendar of year-round membership drives, activities, and initiatives to promote membership growth and retention.
- Monitor the progress and status of membership throughout the year.
- Report membership progress, planned events, and membership campaigns at all board meetings.
- Maintain contact with other board members/committees about how their activities can benefit membership.
- Send completed membership forms and payments to your finance VP/treasurer or to National. Submit payments as soon as possible. It's important not to hold payments longer than a few days. This can severely delay the processing of membership payments and subsequent participation.

Member Management

- Answer all emails and phone calls from current, new, and prospective members.
- Send a welcome communication (via email, mail, or by phone) to new members.
- Refer all new members to study group vice presidents who can place them where they are most interested.
- Maintain member information tracking and updating the current contact information of your members (email, phone, address).
- Prepare for new member and renewal drives 2-3 months in advance to give yourself time to execute your strategies. Create a yearly membership calendar of prospective member events, orientations, renewals, and other important dates.

Types of Membership

BNC has two types of membership: Annual Membership and Life Membership.

Annual Membership

Annual memberships are the bread and butter of BNC. Annual members are defined as current members who have made a payment within the membership year. Annual membership is the number-one driver of your chapter's fundraising. It is directly linked to the success of your chapter's overall fundraising goals.

Life Membership

Although we are not offering new life memberships, your chapter has a cohort of life members who are ready to be engaged. Life members represent the spirit of BNC and have committed to supporting BNC's mission and goal for life. Remember to include them in your events. Hold a special program to bring them back into your

chapter. Many life members have a wealth of knowledge and experience that can be leveraged to bring in new members and help retain existing members.

Recruiting

Attracting new members is essential to the growth of your chapter and of BNC. Recruiting is a year-round activity.

Develop strategies to identify your target audience (retired, working, men, parents of Brandeis students, etc.), This will keep you focused as well help you track progress of initiatives. Create a clear value proposition. You can pull from the Benefits of Membership one-pager. Here are a few tried and true strategies:

- Obtain prospect lists from the previous chair and create a new list. Contact them and offer insight into the benefits of a BNC membership. Note any feedback that you receive, good or bad.
- Post promotional ads on social media, local newspapers (online or print), and places like your local library, recreation center, and any other location offering free or low-cost advertising.
- Set up a prospective member table at chapter events with materials such as brochures, benefits of membership, list of your top programs and events, membership form, and, if possible, a tablet/laptop to register new members on the spot.
- Host a tea for prospective members and announce it on your chapter's website and social media, and in bulletins.
- Leverage your networks (email list, other volunteer communities, family and friends, etc.).
- Keep attendance records at major chapter events and invite guests to become members.

Strategies to Employ

- Create a range of ads for different audiences
- Encourage gift of membership in memory of or in honor of a loved one
- Create “invite a friend” events
- Leverage peer-to-peer networking
- Launch membership challenges throughout the year with prizes for members who bring in the most new members and or a certain number of new members. See examples in the Resources section.

Orientations

New Member Orientation

The purpose of new member orientations is to welcome new members and make them feel valued. Strengthen the relationship to BNC by making sure that the members know the Brandeis story as well as the purpose and objectives of the BNC. Encourage involvement in chapter activities. The personal touch makes a difference between a lifelong member and a member for one year.

Orientation recommendations

- Hold orientations monthly or align them with your membership drives.

- Provide a membership pack (if one was not sent upon the members' enrollment) and review the content so that members understand the importance of the material). See examples in the Resources section.
- Give an overview of Brandeis and BNC's history; include missions and goals.
- Have a board member as well as active members in attendance. Introducing new members to chapter leaders and members establishes a connection that can grow into an organic peer-to-peer mentorship.
- Encourage involvement in chapter committees and activities.
- Emphasize the importance of participation and connect BNC's mission and goal to the philanthropic initiatives your chapter is pursuing.
- Review major events and programs offerings and go over registration timelines and enrollment caps.
- Help members register for events and programs, or refer them to the events and programming leadership.
- Membership Survey: Getting to Know You form. This is the beginning of a Ladder of Leadership (a term coined by former National President Barb Sander to inspire members to take leadership roles).
- Invite members to follow BNC National on Facebook and Instagram as well as your chapter's social media, if applicable.

Add other items that you feel will be effective. Be sure to collect Getting to Know You forms and use the names for a prize drawing, or have members send them in if there is no time to do so at the meeting. It is important that you know about the members' interests in order to involve them in chapter activities.

New Membership Leader (VP, Chair, Volunteer etc.) Orientation

- Arrange a workshop for your new membership leaders to orient them with BNC and Brandeis, assign responsibilities to individual volunteers if applicable, and make sure that everyone knows who they can turn to for help if needed.
- Orient incoming chair/s and transfer all pertinent materials.
- Discuss with volunteers ways to determine new members' special interests or talents, ways to encourage active participation, and procedures used to advise respective chapter chairs of new members' interests.

Member Retention

Keeping members is equally as important as recruiting new members. Your goal is a renewal rate of 85-90%.

Regular communication and personal engagement make members feel valued. If a member is moving out of your community, it's important to connect them with a local chapter close to their new home. If there are no local chapters in their area, refer them to the online chapter. Remember: we are one BNC, so connecting them with another chapter is a win for us all.

Renewals

Send renewal reminders to members who do not renew within three weeks of receiving National's direct mailer. Hold a membership phoneathon to remind them to renew. A personal invitation shows members they are valued.

- Pay special attention to renewals at the beginning of the membership year. Remember that an unpaid member is potentially a lost member.
- Post renewal reminders in bulletins, newsletters, and on social media.

- Send out reminders in advance of the new membership year. Give clear instructions on how to renew membership. Make it easy by providing multiple options for their convenience.
- Help members renew their membership at events.
- One month before the new membership cycle, call members who have not yet renewed their membership.

Mailings from National

- National mails renewal forms (“bills”) to members twice a year: mid-spring and in late summer.
- National emails members two reminders approximately a month before the membership form is mailed.

Reporting

Reporting is an essential function of your responsibilities. It keeps all of us organized and the data current. National provides a weekly email report of your chapter’s annual membership roster. You are responsible for notifying National of all changes of address, transfers to other communities, resignations, and deaths. This information will be updated in the University database. Send updates to bnc@brandeis.edu.

Financial Reporting

- Send all membership checks to National as soon as you receive them from current or renewing members.
- Report receipt of all checks to your chapter’s treasurer and provide the appropriate documentation required by your chapter.
- Any membership payment received should be reported to the registrar, so members can begin enjoying their membership immediately. It takes time for checks to be received by the university, processed, and entered into the database. This is why it is important to send payments to National promptly.
- You don’t have to wait until a member shows up on the weekly report to allow members to register for an event. Your receipt of the payment is proof.

Reporting to National

- Updated member contact information
- Enrollment of new members
- Membership promotions that can be shared on social media
- Deceased members (this is important so that we don’t send renewal reminders and other correspondence to their home)
- Feedback from members
- Any issues that you cannot resolve

Reporting to Your Chapter’s Board

- Prepare a report on your activities to present at board meetings. This includes membership plans and progress.
- Keep the board informed of any membership issues.
- Report feedback from members.

Collaboration

It's vital to the success of your chapter to work closely with other members of the board. Each role on the board requires some level of collaborative work with various leaders to fulfill their responsibilities. You should:

- Implement procedures so that all relevant leaders are aware of all new members as they are enrolled.
- Discuss with the board or relevant Chairs or VPs ways to determine new members' special interests or talents, ways to encourage active participation, and procedures used to advise chapter chairs of new members' interests.
- Work closely with the Finance VP/Treasurer and Program and Events VP/Chair to develop programs and ads to attract new members.
- Work with the Communication Chair to prepare bulletin announcements on the importance of continuing membership, shouting out volunteer members, and welcoming new members.

Resources

Recruitment and Retention Ideas

Peer-to-peer challenge

- ★ Every member who gets two or more people to join in a fiscal year gets a free Study Group/Program of their choice or of a limited value (dollar amount).
- ★ Every member who gets five or more people to join in a fiscal year gets free admission to an event. It can be of a certain value or admission to an event that your chapter does annually, such as Book and Author or University on Wheels.

Invite a friend challenge

Every member who successfully invites five people to a prospective member tea or an event receives an event discount, free program, or their name listed in an upcoming bulletin as a “Membership Rock Star.”

Prize drawings

Choose a program or event at which to hold a prize drawing. Members can receive an entry for their participation in various activities, events, or volunteerism with the chapter.

Welcome Packet Ideas

- Welcome letter from chapter president
- Getting to Know You questionnaire
- Schedule of events and programs
- Copy of the most recent newsletter or bulletin
- Brandeis pen, bookmark, and/or sticky notes
- Information about philanthropic giving

Video to show at new member orientation, embed in email, etc:

[Brandeis students, faculty, and BNC members are featured in this 2024 video about the impact of BNC](#)

Collateral

- Benefits of Membership
- FAQs

Online Resources

[Supply Orders](#)

[Membership Renewal](#)

[Gift of Membership - Individual](#)

[Gift of Membership - Joint](#)

[BNC Facebook](#)

[BNC Instagram](#)

Other Resources

Sample Membership Questionnaire - Image on page 12 (Actual document available online under Password-Protected Documents)

Sample Getting to Know You - Image on page 13 (Actual document available online under Password-Protected Documents)

CHAPTER LOGO HERE

(sample questionnaire)

To Our Valued Members,

We want to build strong relationships and provide service to our valued annual and life members. Please take a few minutes and answer these questions.

When was the last time you attended a meeting? _____

What Study or Special Interest groups do you regularly attend?

Do you have any suggestions for particular Study or Special Interest groups, events?

Do you have preferences as to day/time for Study or Special Interest groups?

What days _____

What hours _____

Would you like to participate in day to day functions of the chapter? _____

Do you have any special talents/expertise that might be helpful to the chapter?

We welcome your comments.

Please respond. If you fill in your name/address, we will be in touch.

Name _____

Address _____

Mail to: (Enter mailing address of chapter contact here)

Getting to Know You

Name _____

How did you hear about BNC and your chapter? _____

BNC communicates with its members in many ways. Which of these do you use:
Check all that apply.

- ☐ email
- ☐ Text
- ☐ Phone
- ☐ Mail
- ☐ Facebook posts

How would you prefer to receive communications about events and programs?

Have you ever been a member of a fundraising organization before?

What are you hoping to gain through membership in BNC? (Check all that apply)

- ☐ New community
- ☐ Participate in study groups
- ☐ Lifelong learning

What events or programs are you looking forward to participating in?

Is there a specific role you'd be interested in taking on within your chapter?

HANDBOOK RECEIPT

I acknowledge that I have received the updated Brandeis National Committee Membership Leader's handbook. I understand that it contains important information regarding the responsibilities of the BNC membership leaders' position, and I agree to familiarize myself with it.

BNC National reserves the right to amend, modify, alter, change, delete, revoke, or add to all or any part of these policies, practices, and procedures at any time and without prior notice.

I agree that I have received and acknowledged the 2025 Membership Leaders' handbook.

Name _____

Chapter _____

Date _____

Email _____