

Alumnae Chapter Recruitment and Retention Annual Plan

Chapter:

Calendar Year:

Completed By:

Position: Membership Chairwoman Vice President Other: _____

Date Completed by Officer:

Executive Council Review and Approval Date:

Purpose

This plan serves as the chapter's annual strategy for recruiting new members, engaging existing members and fostering long-term chapter participation. The membership chairwoman (or vice president, if the position is vacant) should complete this plan at the beginning of each calendar year and present it to the executive council for review and approval.

Part 1: Current Membership Assessment

Membership Snapshot

Number of current chapter members: _____

Number of new members recruited and retained last calendar year: _____

Number of members who became inactive or disengaged last calendar year: _____

Average number of members in attendance at each event last year: _____

Membership Strengths

What is currently working well in your chapter's recruitment and retention efforts?

What aspects of the chapter experience appear to be most meaningful or appealing to members?

Which recruitment activities have been most successful during the past year?

Membership Challenges

What membership-related challenges does your chapter currently face?

- | | |
|--|---|
| <input type="checkbox"/> Recruiting new members
<input type="checkbox"/> Engaging younger alumnae
<input type="checkbox"/> Retaining existing members
<input type="checkbox"/> Event attendance | <input type="checkbox"/> Volunteer participation
<input type="checkbox"/> Leadership succession planning and execution
<input type="checkbox"/> Member communication
<input type="checkbox"/> Geographic dispersion
<input type="checkbox"/> Other: _____ |
|--|---|

Additional Comments:

Part 2: Annual Membership Goals

Identify two to four membership goals for the year.

Goal	Success Measure
<i>Example: Utilizing strategic recruitment practices, recruit 10 new chapter members.</i>	<i>Example: 10 new chapter members join by end of calendar year and are added to the member roster.</i>
1.	
2.	
3.	
4.	



Part 3: Recruitment Strategy

How does the chapter plan to recruit and welcome new members this year?

Recruitment Activities

- | | |
|--|---|
| <input type="checkbox"/> Personal invitations from current members | <input type="checkbox"/> Social media promotion |
| <input type="checkbox"/> New alumnae outreach | <input type="checkbox"/> Collaboration with local collegiate chapter(s) |
| <input type="checkbox"/> Chapter open houses | <input type="checkbox"/> Outreach to recent graduates |
| <input type="checkbox"/> Founders Day guest invitations | <input type="checkbox"/> Outreach to relocated alumnae |
| <input type="checkbox"/> Social events for prospective members | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Community service events | |

Priority Recruitment Actions Specific to Activities

List the three most important recruitment actions your chapter will complete this year keeping in mind your annual membership goals and activities selected above.

Examples: Personally invite via text and call at least 20 local alumnae to attend fall kick-off event; host one prospective member coffee social in the spring; contact all recent graduates on the area report by October 1.

1.

2.

3.

Event Follow-Up Plan

How will the chapter conduct follow up with members following events to thank them for attending and provide opportunities for future connection?



Part 4: Retention and Engagement Strategy

How will the chapter create meaningful experiences that encourage members to remain active and involved?

Engagement Priorities *Select all priorities for the calendar year:*

- | | |
|---|---|
| <input type="checkbox"/> Increasing event attendance | <input type="checkbox"/> Supporting new members |
| <input type="checkbox"/> Improving member communications | <input type="checkbox"/> Offering diverse programming |
| <input type="checkbox"/> Creating welcoming chapter culture | <input type="checkbox"/> Recognizing member contributions |
| <input type="checkbox"/> Developing future leaders | <input type="checkbox"/> Strengthening member relationships |
| <input type="checkbox"/> Increasing volunteer involvement | <input type="checkbox"/> Other: _____ |

Retention Actions

List the three most important retention actions your chapter will complete this year.

1.
2.
3.

Re-Engagement Plan

How will the chapter reconnect with members who stop attending events or become disengaged?

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Part 5: Accountability and Review

Note:

The Appendix section of this plan provides a detailed quarterly checkpoint process to guide the executive council's conversation and review of plan progress.

Quarterly Checkpoints

The executive council will review progress toward membership goals during the following meeting dates:

- March Meeting Date:
- June Meeting Date:
- September Meeting Date:
- December Meeting Date:

Success Indicators:

At year-end, our chapter will consider this plan successful if:

Executive Council Approval

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President:	Date:
Vice President:	Date:
Treasurer:	Date:
Membership Chairwoman (<i>if applicable</i>):	Date:

Appendix A: Quarterly Membership Plan Checklist Process

The executive council should review progress toward the chapter's Recruitment and Retention Annual Plan during its quarterly checkpoints (March, June, September and December). Use the below process to guide quarterly checkpoints regarding recruitment and retention efforts.

Step 1: Review Membership Goals (three to five minutes)

The membership chairwoman (or vice president) provides a brief update on each annual membership goal, including:

- Progress made since the previous checkpoint
- Current status toward achieving the goal
- Any challenges or barriers encountered

For each goal, indicate:

- On track
- Needs attention
- Off track

Step 2: Review Recruitment Activities (two to three minutes)

Discuss:

- Recruitment actions completed since the previous checkpoint
- Number of prospective members contacted or engaged
- Number of new members recruited
- Upcoming recruitment opportunities

Questions to consider:

- Are recruitment efforts producing results?
- Are additional recruitment activities needed?

Step 3: Review Retention and Engagement Efforts (two to three minutes)

Discuss:

- Event attendance trends
- Follow-up completed with attendees
- Re-engagement efforts with inactive members
- Feedback received from members

Questions to consider:

- Are members returning to events?
- Are new members becoming engaged after joining?
- Are there members who may benefit from personal outreach?

Step 4: Identify Adjustments (two to three minutes)

Determine whether any changes are needed to remain on track for annual goals.

Examples:

- Add a recruitment event
- Increase personal invitations
- Adjust communication strategies
- Assign outreach responsibilities to executive council members
- Provide additional support to the membership chairwoman

Document any agreed-upon action items and responsible individuals.

Step 5: Record Progress (one minute)

The secretary records:

- Overall membership plan status
- Key accomplishments
- Action items
- Responsible individuals
- Timeline for completion

Year-End Review (December Checkpoint)

During the fourth-quarter review, the executive council should also:

- Evaluate achievement of annual membership goals
- Identify successful recruitment and retention practices
- Document lessons learned
- Recommend priorities for the following year's Recruitment and Retention Annual Plan