

MEMBERSHIP STRATEGY

A guide to understanding, and building upon our existing membership base.

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Introduction

Our membership do fantastic work recruiting and retaining members. And we want to give you the help you need to do more.

That's why we've produced this guide.

Our task is not impossible. Even getting in touch with strong supporters, explaining the benefits of membership, will make a difference!

Many supporters simply haven't joined as a member because they were not aware that it was an option or simply - that they hadn't been asked.

Some people join because they want to vote in Party elections.

Some people join because they like the social side of membership — attending events and dinners.

But many people join because they want to help us win elections. So we need to make sure we're clear: member subscriptions fund our campaigns. By paying a subscription and doing nothing else, they're helping us win elections and put in place the policies they believe in.

We rely on our Voluntary Party. We couldn't function without your hard work. That's why we want to share what we've learned with you.

Whether you're a seasoned pro and just want some tips on retaining members, or whether you're entirely new to the process. We think you'll find this guide useful.

And remember: the Membership team are here to help you. So if you've got any questions, or want to raise any issues, please get in touch: vic@nationals.org.au

Thank you for all your hard work!

Matthew Harris

State Director

The Membership Cycle

Recruiting new members is great - but it's just the first step.

Membership is a cyclical process. So its not just about joining and renewing - it's also about what we do in between.

The way to retain members is to remind them how important they are. That means keeping in touch with them.

It's often the small gestures that show members we value them. Like welcoming them when they join, reminding them of their importance - and letting them know what their subscription is helping to achieve.

Head Office are now administering renewal communications and there's a new monthly newsletter by email for all members. But if you're not already engaging your members locally, now's the time to start.

We can only increase our membership if we work together - with Branches and District Councils recruiting and retaining members, and Head Office supporting your hard work.

Membership Cycle

STAYING INFORMED

- Notice of DC and Branch AGM
- Report from State Council
- Event Calendar
- HO managed monthly email newsletter

STAYING INVOLVED

- local regular newsletter
- Invite to campaign locally
- Invite to Party Conference
- Take part in Policy Forums

WELCOME MEMBERS

- Member welcome letter/ email
- Welcome call from MP
- Events Calendar
- Welcome call from DC/ Branch President

RENEWING MEMBERS

- HO Managed renewal letter/ email
- Lapsed member campaign

RECRUIT MEMBERS

- Target Your Audience
- Recruitment Campaign

How to Run a Membership Recruitment Campaign

The success of The Party depends heavily on having an active and varied membership. We should recruit new Members throughout the year, avoiding large one-off membership drives, which are often expensive, time-consuming and difficult to administer.

Recruiting members should be done on a regular basis and become a normal part of your District Council activities. **Many Nationals supporters would consider joining the Party, but have never been asked.** No DC has too many members and even the best organisation can do more to attract and retain them.

In drawing up this advice we have gathered best practice from National Party Branches and DCs across the state.

As with every other aspect of campaigning, you will need to undertake an honest review of your present situation before you can draw up a recruitment plan for the coming months.

Before deciding where to start it is important to look at the strengths and weaknesses of your current membership. There is little point in just looking to increase the overall membership; instead you will need to target your efforts on those areas that are weak and need building up.

You will also need to prioritise your programme based on the resources and information available to you.

Planning your Membership Recruitment Campaign

As part of your planning process, you will need to review the number of:

- **Active branches**
- **Electors in each branch**
- **Electors Identified as voting National at the most recent election**
- **Strong National Party Voters identified by canvassing and recorded in Voter.ID**
- **Current Members, including breakdown by branch**
- **Former/Expired Members and break this down by when their membership expired**
- **Registered Supporters of the Party**
- **Helpers who are not Members**
- **Donors who are not Members**

This will give you an idea of your strengths and weaknesses and will help you to plan your campaign.

Setting Targets

Before you start you must first identify who will be responsible for recruiting and retaining Members both within the DC and the branches.

Using the information already compiled you will be able to decide which areas to target. You may decide to target those areas that are weakest, or stronger areas where you should have a higher membership.

Whatever approach you use it should be based on what will bring the greatest benefits to your DC.

The first step should be to set a target such as:

- **5% of the National Party vote at the last local election**
- **10% of Strong National Party supporters canvassed in a certain time frame**
- **A percentage increase above the current Membership**
- **A numeric increase in the current Membership**

For example: 10% of Strong National Party supporters canvassed within a period of 6 months reviewed on a monthly basis.

Remember to set realistic and attainable targets and that one formula may not suit all your branches.

When setting your targets remember the following:

- **Clearly identify the tasks and gain acceptance from all those involved.**
- **Ensure that everyone is aware of the campaign and the targets and that they understand what is happening and why.**
- **Maintain Interest with regular progress reports.**
- **Regularly review progress and amend your plan accordingly.**
- **Recognise success and learn from your failures.**
- **Consider encouraging branches and wards to 'compete' with each other for the most improvement.**

Key pointers for success

Always start in an area where you are likely to have a good response. This will help sell your idea to your DC and get you off to a positive start. It will also motivate the members helping you to keep going - or to help again when you ask.

Run small but regular campaigns. Large campaigns are expensive and take a great deal of organisation. If you run a regular campaign of a few hundred pledges each month with a reminder the following month, then this not only keeps down the costs but also becomes a part of the routine.

Make a plan. Always plan your campaign and ensure that you send out a high quality product with a positive message.

Emphasise the benefits of joining the National Party as a Member:

- **Help us win elections** - Your subscription goes towards our campaigns
- **Get the latest from inside the Party** - with regular member updates
- **Choose the candidates who'll stand in elections, and vote in leadership elections** - so you can choose the people you want to represent you
- **Influence Party policy** - take part in motion debate at Annual Conference
- **Take part in our campaign groups** - like the subcommittee into tactics or the Young Nats.
- **Connect with local Nats** - Meet like-minded people and make a difference to our country
- **Come to Conference** -join our MPs, councillors and activists in the biggest event of the calendar
- **Stand for election** - members have the opportunity to stand for election for the National Party. So if you decide that you want to take part in our democracy, you can!

Choosing your methods

Once the above steps have been completed it is time to start recruiting new members and you will need to decide upon the best method to use.

There are five basic methods of recruitment:

1. **Direct Mail**
2. **Doorstep**
3. **Telephone**
4. **Leaflets**
5. **Online**

You may decide that a combination of these approaches will work best for you as not everyone will respond to a single request to join.

Whatever approach you take, you should use Voter.ID to plan and record your recruitment campaign. Voter.ID automatically tracks the contact you have with electors in your constituency. This makes it easy for instance to write to certain people, and then follow-up with a phone call to those who have not joined following the initial mailing.

Direct Mail

This is the most popular method of recruiting. Instead of mailing everyone, why not use Voter.ID to target different groups?

For example, you could target Strong National Party supporters who vote in most elections, or you could target people based on demographics and lifestyle.

Its up to you! But the more targeted your message is, the more successful it'll be. And the lower your costs will be, too.

You should consider the following points when planning your mailings:

- **Letters and accompanying literature should always look professional.** Think about the direct mail you receive at home, for instance from charities. That is what you are competing against when you are asking for financial support
- **Write letters on your Association letterhead and use printed membership application forms** - these are both items available to purchase on BluePrint.
- **Provide a named contact for people** to call or email to find out more.
- **Personalise the letter and application form by mail merging the recipient's name and address.** Avoid generic letters addressed "Dear Resident" • these always get a poor response.
- **Include recent literature** - updates from the local councillor, local campaign team or Member of Parliament to show what the Conservatives are doing in the local area. It demonstrates what campaigns their subscription will support.
- **Enclose a reply paid envelope for convenience.** The costs are outweighed by the increase in responses.
- **The letter should be positive, get to the point and not be more than one page.** The Voter Communication guide 'Writing to Win' has lots of useful tips about effective communication. Apply these tips to your membership recruitment direct mail. You can download the guide from the 'Assets' section on BluePrint.
- **Explain in the first paragraph that you are asking them to get involved with the Party,** and clearly present the ways they can do so.
- Although you may want to be critical of our political opponents, for instance an unpopular local council. ensure that this is balanced with a **positive Conservative message.**
- **Emphasise the benefits** of Joining the Conservative Party.
- **Emphasise the cost benefits to the Party of joining online and paying by Direct Debit.** This is particularly useful for a former member mailing - you can suggest they sign up for a direct debit so they do not unintentionally lapse in future.
- **Give them a guide as to how much you would like them to pay,** including details of monthly Direct Debit options.
- **Always Include a PS to emphasise the main point of your letter** as people often read this first.

Membership application forms are available from Head Office

Doorstep

There are two types of doorstep recruitment a straightforward recruitment campaign and a follow-up to direct mail or a telephone call. Whichever method you use you must ensure that you are well prepared and your recruitment teams are fully briefed:

- Plan ahead which streets you are going to visit.
- Decide upon the best time to call, when most people will be at home.
- Always work as a team. don't send individuals out on their own.
- Let the team know who they are targeting - e.g. Strong National Party voters identified from election canvassing. people who responded to direct mail. blanket coverage etc.

The teams will need:

- A Voter.ID report of the electors to be contacted during the campaign
- Maps highlighting the areas to be covered
- Relevant and up-to-date literature
- Membership forms
- A smartphone/tablet
- Briefing notes and a script. Make sure everyone is aware of what contact you have had previously with the electors you are calling on today
- Pens and pencils

On the doorstep:

- Don't have two recruiters on the same or adjacent doorsteps.
- Be friendly and act naturally.
- Be positive. don't make excuses or apologise for calling in.
- Address the resident by name and confirm your records are correct. Remember, the electoral register does not include gender or title information, so check you are talking to Mrs Jones, rather than Dr Jones, Ms Jones or Miss Jones. Make sure any changes are recorded in Voter.ID.
- Introduce yourself and tell the resident you are from the local National Party and explain why you are calling.
- Follow the script.
- Don't argue - refer problems to the relevant MP.
- Tell them about the benefits of Joining the National Party.
- Be specific about the annual membership subscription. A minimum \$90 for standard membership, \$10 for Youth membership (under 35)
- Ask them to Join online using your smartphone or tablet at vic.nationals.org.au This way you don't have to take money on the doorstep, the new member gets the payment confirmation directly to their email address.
- If you are following up a direct mail campaign and are handed an envelope containing a membership subscription don't open the envelope in front of the resident. Thank them for their subscription and explain that they will receive their membership documents shortly.

Telephone

This can also be used in two ways: either as a direct approach for membership or as a prelude or follow-up to a letter or leaflet drop.

It is more Likely that this approach will be used in conjunction with a survey canvass. The main drawback of using the telephone is that unless you have credit card facilities you will not be able to collect the subscription.

However, the benefits of using the telephone are that you can:

- Make a greater number of personal contacts on the phone than going door to-door.
- Contact people at all times - wet or dry, light or dark.
- Follow up responses to surveys or feedback from leaflets. to assess how keen to join the person is.
- Reach people by phone who would otherwise be inaccessible.
- Set up appointments to sign up members.

Recruiting by telephone is most successful when calls are followed up by a letter or personal call.

A growing number of electors are now registered with the Telephone Preference Service (TPS). You should not call someone who is TPS registered unless they have given the Party their telephone number themselves, or members or recently lapsed members'. or there is a potential fine of up to E5.000 per call. It does not matter if the person is listed in the local

telephone directory - you must always check if a number is TPS registered before calling. For advice on ensuring your data has up to date TPS information contact the Support Services team at helpdesk@conservatives.com. When you produce a leaflet or form to send to potential new members, remember to include discreetly the following wording: "If you are registered for the Telephone Preference Service, by giving us your number you are giving us permission to occasionally call you."

When an elector supplies their telephone number, this should be recorded in VoteSource: if their number is on the TPS register it will be updated as such within one week. To overwrite the TPS you will need to delete and re-enter the number.

- For members we do not need consent as such, as a 'contract' exists between us and we therefore have a 'legitimate interest' to communicate with them. It is reasonable to include recently lapsed members, such as those who lapsed within the last 6 months.

Leaflets

Never miss an opportunity to recruit new Members. All of your campaign leaflets should include some mechanism to join the Party, depending on the type of leaflet and the space available.

The easiest option is to put a web address e.g. www.conservatives.com/Join or direct them to your Association website - as long as there is a mechanism to pay online.

Online

National Party Website

The website is often the first impression people get of the Party- The website has an events page which is regularly updated to keep our members informed on Party events in their local area, a policy page which promotes the issues which our MPs are addressing and a membership page, allowing people to join as a member.

Email

Sending emails is a cost effective way of communicating with prospective or lapsed Members. Any email list larger than 100 people should be emailed via a specialist email service provider. This allows you to include images and design elements, making your communications look more professional, and ensures your emails are not marked as spam.

Most email providers charge for this service but when compared to the cost of communicating to the same volume of people via post is cost effective. There are a number of providers on the market, but we recommend MailChimp as an easy-to-use and inexpensive provider - it is free for mailing lists up to 2000 addresses and cheap thereafter.

Social Media

If budgets allow, you may want to consider a paid social media campaign, aligning targeting where possible to that selected for a direct mail campaign.

Online campaigning works best in conjunction with an offline effort. Make sure that your message is the same online and offline.

Ensure you collect and record supporters' email addresses and mobile numbers for careful and selected use in addition to everything else you do for your campaign.

Be sure to always include a note of the end of each email saying that they can stop receiving emails whenever they wish. It should be easy for them to do this.

Follow it up

If you've put in the hard work to identify potential members, then don't let it go to waste! Follow up immediately by sending a membership application form (with reply-paid envelope), together with details of how to join the National Party online.

ALL Letters and membership forms should look professional and be personally signed.

You can track everyone who has requested information on joining the Party on Voter.ID. If an individual has not joined after you have sent them a form or emailed them the link to join, follow up with a phone call to find out why.

Welcoming new Members

New members are an important group. The first year of their membership is the best opportunity to show the value of their membership and get them involved. Their experience in the first few months could determine whether or not they renew at the end of the year.

When you join a club or organisation and pay to do so you would expect to receive some acknowledgement of joining. The National Party should be no different.

New and renewing members will receive their membership cards from HO. HO will also email basic 'what do next' information to members encouraging local participation.

Membership welcome packs are an excellent way of thanking new members for joining and providing further information about the activities of the DC. It is also an opportunity for you to find out a bit more about your members, if they have any particular skills and whether they are able to help the Party in any other way.

A Membership Welcome Pack should include:

- A welcome letter from the MP
- A diary of future fundraising and social events
- Contact details of key DC and branch officers, councillors and MP
- A diary of political events
- Further details on how to get involved

This can even be something you send by email with links to the relevant pages on your website. if they are kept up-to-date.

A personal welcome will encourage them to get involved and show that you value their membership. This could be a call from a Branch Officer or a Member of Parliament.

Membership Renewal and Retention

It is often much easier to get a Member to renew than to recruit a new Member from scratch.

As mentioned in the Membership Cycle section we retain members by keeping in touch with them. Ideally once a month. HO produces a state wide e-newsletter for members sent out once a month, and it includes news, surveys, and topics of interest,

Valid email addresses are vital for low cost, frequent communications. Take every opportunity to validate emails for your members and where missing, and pass on to HO.

HO will administer a series of emails and letters at time of renewal and, if not renewed by time of expiry. during the three month grace period. Following this grace period you should engage in a campaign of win-back for lapsed members.

When looking at newly lapsed members, ask yourself why they haven't renewed:

- **How long have they been paid-up Members?**
- **Has someone asked them why they have not renewed?**
- **Have they moved or died?** Only when you are sure that they are not going to renew their membership should their membership be terminated in Voter.ID

It is important to find out why lapsed Members decide to leave and use this information to improve the way you involve people in your DC. Don't just assume that because they haven't renewed they are no longer interested in being a Member.

Call them and find out why they have failed to renew. This information could prove invaluable in improving the relationship you have with your membership and stabilise levels of retention.

If someone makes it clear that they aren't prepared to renew their membership, make sure this is recorded in Voter.ID, including the reason for ending the membership.

Make it fun!

A rolling programme of membership recruitment activities is one of the core tasks of a local DC activity.

There is a lot of hard work involved but it is important to make sure that recruiting members is also fun and that we recognise and reward achievement.

It is important to encourage friendly competition between branches to see who can recruit the most new members or who can achieve the greatest increase in membership.

Publicise your results and your winners in your members' newsletters and e-communications.