

Talking Points: Understanding the Role of the Membership Committee

Date: 9/7/23 Time: 8:30 a.m. Location: Zoom

Objective: To provide new members with an overview of the Membership Committee's role, responsibilities, and functions within the organization.

Talking Points:

1. Importance of Membership within Organization

- *A brief overview of the organization's mission, goals, and structure.*

ARTICLE II Sec. 1. The principal purpose of the Association is for the maintenance of to maintain an organization composed of leading business and professional persons in the greater San Francisco, California bay area counties, each represented by one of its executives--Primary members, for the mutual benefit of all, solely and directly to benefit the business of its members, with industry experience and knowledge, ideally, 5+ years of experience.

- *Explanation of how the Membership Committee fits into the larger organizational framework.*

The Membership Committee is central to the organization-- the gatekeeper of the organization that screens prospective members and recommends approval of prospects to the Board.



2. Introduction to the Membership Committee

- *Definition of the Membership Committee's role and purpose within the organization.*

ARTICLE XVI Sec. 2 (2). MEMBERSHIP COMMITTEE – This committee shall investigate and promote membership in the Association, explore all applications for membership, pass upon protests and membership classifications, investigate objections affecting membership, and report its findings and make its recommendations to the Board of Directors.

- *Explanation of why the committee is essential for the organization's growth and sustainability.*

Membership is core to the organization's growth and sustainability by assuring recruiting qualified, quality members willing to actively contribute and engage with the organization; identifying and recommending corrective action to issues that might impede recruitment of members or relationships and supportive environment among current members.



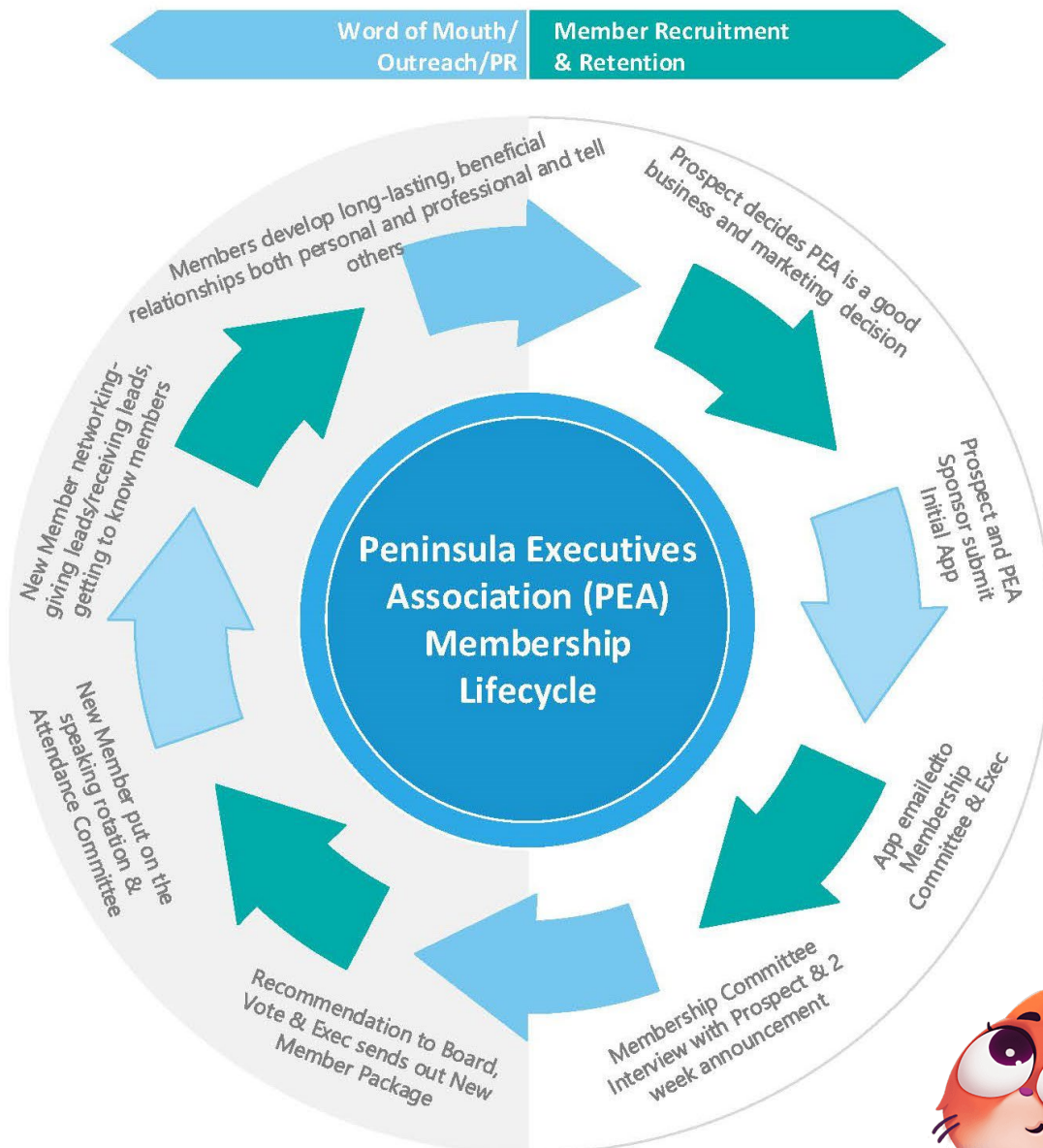
3. Key Responsibilities of the Membership Committee

- *Explanation of the primary responsibilities of the Membership Committee, including:*

- Member recruitment and outreach strategies.
- Reviewing and approving membership applications.
- Membership engagement and retention efforts.
- Developing strategies to enhance member experiences with feedback from current members and past members (exit interviews)

4. Understanding the Membership Lifecycle

- ***Walkthrough of the membership lifecycle: from the point of application to engagement***



- ***How the committee supports members at different stages of their involvement.***



The Membership Committee's job is not only to screen prospective members but also to find ways to find tools and approaches for current members to recruit possible prospects, address issues in addition to identifying ways that the organization can be more supportive to each member's business success.

5. Collaboration and Communication

- ***The Membership Committee collaborates with other committees in various ways:***

Finance – to make sure that when interviewing prospective members, we have the right current dues and what can be expected down the road; PR – sound bites and stories that keep current members informed and engaged while attracting possible new members; boosters – member recruitment opportunities for prospects; mentor – creating a seamless hand-off when a new member has been approved by the Board so that they get further information and guidance to be able to readily get involved.



- ***The importance of effective communication and with the broader membership.***

From a survey we implemented last year, we identified key industries PEA members wish to cultivate to become members.

6. Key Achievements

- The Membership Committee has recommended over 15 members in the last two years expanding the variety of industries represented in PEA and increasing the number of businesses that are expanding.
- Recently, we reformatted the Interview Questionnaire to be a bit more intuitive and added questions encouraging new members to think about including an Associate to represent the company when the primary member is absent from meetings.



7. Q&A's

8. Call to Action and Next Steps

- We ask all members to let us know when there are improvements to be made as well as offer suggestions to make recruitment and retention even better!

9. Networking Opportunities

- Upcoming in-person meetings
 - ✚ Café Wisteria
 - September 21st, October 12, November 16, December 14
- Events
 - ✚ Member Picnic, September 17th
 - ✚ Holiday Party, December
- Open House at your premises or other venue
- Host a lunch or coffee with PEA members and colleagues who may be interested.
- Collaborate with another PEA member to host an informal gathering.
- Think of people you know who are in these industries or others:
 - ✚ Vet
 - ✚ Pet store
 - ✚ Restaurant
 - ✚ Therapist
 - ✚ Electrician
 - ✚ Grocery store
 - ✚ Florist
 - ✚ Book store
 - ✚ Printer
 - ✚ Auto detailer
 - ✚ Dermatologist
 - ✚ Dry cleaner
 - ✚ Exercise/Fitness professional
 - ✚ Nutritionist
 - ✚ Hair Salon
 - ✚ Massage therapist

