

Membership Retention Program

Introduction

Membership retention is the practice of keeping the members a chapter already recruited until the members leave school. Better retention in a chapter results in more members. By retaining more members, chapters become healthier, provide more service, and offer more opportunities to develop leadership skills and make more friends.

The more active members a chapter has, the easier it becomes to recruit new members, which gives the chapter an opportunity to grow exponentially. Retaining active members has the same effect on chapter size as a large pledge class. By retaining more members, chapters will have the breadth of knowledge that comes with experience. The longer a brother is active, the more experience and knowledge they accrue and give back to the Fraternity.

With a better retention rate, chapters will have a larger membership from which to draw ideas, share the responsibility of the chapter, and develop leadership opportunities. Retention helps members grow and learn from each other. Older members have a chance to teach younger members how to run the chapter and how to transfer those same skills to the workforce. As chapter members grow and are recognized for the service they provide, the chapter is able to do the same. The chapter can build a better reputation for its members and be recognized for all the service and hard work they do.

Retention creates opportunities for more members to learn and practice their leadership development skills, to meet new members and provide more service. By helping each other grow, the members experience the strong bonds of brotherhood and create lifelong friends.

In an ideal world, chapters would retain all members. However, problems occur when chapters are competing for members' time and focus. Each member has many other things that take up their time such as jobs, family, other organizations, schoolwork, etc. In order for members to choose to spend their time with Alpha Phi Omega, chapters need to know why members chose to spend their time with APO when they pledged, and use the information to foster that connection. Brotherhood can be created by knowing what the members want and reinforcing that value to them. In creating membership retention plans, chapters should use a five-part process: assess, diagnose, plan, implement, and evaluate.

How to Calculate Retention

$$\frac{\text{\# of Returning Actives (AAMD)}}{(\text{Last Year's AAMDs} + \text{Last Year's Initiates}) - \text{Seniors}}$$

For Example...

A chapter would like to calculate their retention rate. They have **42** active brothers this year, **35** AAMDs last year, initiated **24** new brothers last year, and had **10** brothers graduate.

$$\frac{42 \text{ Returning Actives}}{(35 \text{ Last Year} + 24 \text{ Initiates}) - 10 \text{ Seniors}}$$

= 85% retention rate

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Instructions

This document outlines a step-by-step process for each chapter to assess its membership retention, diagnose its problems, plan activities to combat those problems, implement plans, and evaluate activities.

As each chapter's membership is different, so will each chapter's retention plan be different. Some steps may take longer than others. It is important to complete each section in order; Assess, Diagnose, Plan, Implement, and Evaluate. A chapter can choose to break the Assess, Diagnose, and Plan section into separate meetings, or plan a longer meeting or a chapter retreat and complete these all at once. As the semester progresses, the chapter will Implement the plans and activities, and Evaluate them as needed.

During this process, brothers will offer many different points of view. It is important to be open to all opinions. It is useful to ask for an advisor's help in managing the flow of communication during this session. It is ultimately up to the chapter to come to a consensus and agree how to fix problems. Prior to the start of this session, ask for an advisor's help to review how to respectfully give constructive criticism and solve problems.

How to create a retention plan, step – by – step:

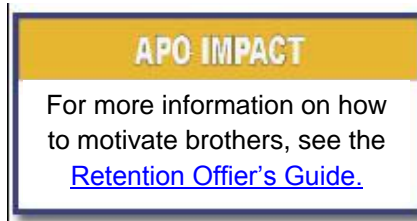
Assess

1. **Identify why members joined APO.** Members joined APO because the chapter meets one of their needs, or they find something of value by being a member. Find out what those needs and values are.
2. **Identify why members have continued to be involved with APO.** Ask why members stay involved. Do they stay because the chapter meets the same need as when they joined? Is there a different need that the chapter meets instead? As members grow and develop, how are their needs changing? What has to change within the chapter to meet those changing needs? Steps 1 & 2 can be completed by doing a general survey of the chapter, or through discussion at a chapter meeting. These steps can also be completed as part of your Chapter Assessment and Planning Session ([CAPS](#)).
3. **Identify the activities that the chapter is doing to support membership retention.** Examine the chapter's current retention plan. Write down and identify what retention activities the chapter is doing. Do they work? If they are not working, it's time to revise them or scrap them and start over. If there is not a plan, it is time to create one!
4. **Identify the needs of the members in the chapter.**
 - i. Use the Basic Needs Assessment worksheet in Appendix A. The Basic Needs Assessment (Appendix A) worksheet breaks down the chapter's retention situation. The worksheet helps look at brothers at four different points in membership: new brothers,



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- elected officers, seniors or older brothers, and advisors. Identify the needs and wants of brothers at each of these points.
- ii. To find the needed information, survey current chapter members and past chapter members and conduct exit interviews with members who do not want to return. Online tools such as Survey Monkey and Zoomerang are useful in gathering this information.
 - iii. A common problem with many chapters is “apathy.” It seems that no one in the chapter cares what happens. This is often a sign of something deeper than just not caring. Really look at why each individual feels the way they do and why. Get back to the basics of why members joined APO, and why they stay involved. Use this information to motivate the chapter to break the cycle of “apathy.” Many older members may seem to have a bad attitude, or the “been there, done that” mentality. In order to break this mentality, the chapter needs to plan and utilize the knowledge gained from older members’ experiences. Use the knowledge members gained while “there” so that the chapter does not do “that” again. Appeal to these members’ sense of purpose. Make it their purpose in the chapter to teach others what they know. Make it a fun atmosphere so that everyone feels the camaraderie. And finally talk about how these experiences have helped older members grow personally and professionally. Older members can discuss how they used the experiences they gained in the chapter to search for a professional job. More ideas on how to utilize the vast experiences of older members are detailed under Step 9.



5. **Identify why members leave the chapter (aside from graduation).** Contact past members to ask why they left the chapter to see what needs were no longer being met.
 - i. This can be done by surveying past chapter members and conducting exit interviews with members who do not want to return. Ask for an advisor’s help if necessary.



Members tend to stay involved with APO for three general reasons: personal growth, camaraderie, and a sense of purpose. These three reasons are analogous to our cardinal principles of Leadership, Friendship, and Service. Look at the reasons members are leaving and staying in light of each of these areas. Use the worksheet in Appendix B to assist in this process. If a lot of members are leaving for one reason, a retention plan might include strengthening programming in that specific area. For instance, if members are leaving because they are not completing their service hours, look at how many projects are being

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provided to the membership. Are there enough projects to support everyone in their efforts to complete all of their hours? Is the amount of hours too high in relation to your chapter's service schedule?

6. **Assess the pledge program.** The pledge program is where each person learns how to be an active member. Are pledges being taught to be the type of active members desired? How does the pledge program compare to the active program? If there is a difference, when pledges become active members they could become disappointed in the Fraternity. Utilize time during your [CAPS](#) to take a look at your pledge program. Write a list of what pledges do and a list of what actives do. Compare the two lists, and assess if what the pledges are learning is preparing them for active membership.

Diagnose

Diagnose the problems found in the assessment of the chapter's needs.

7. **Examine the activities from Step 3** (Identify the activities that the chapter is currently doing to support members.) **Are these activities meeting the needs of the members in Step 4** (Identify the needs of the members in the chapter)?
 - i. Be able to answer for each activity the chapter completes: What is the purpose behind this event? Does it reach the intended audience? Is it working toward our chapter's goals? Utilize event evaluation sheets to answer these questions.
8. **List the problems the chapter had with the activities.** Identify why activities from Step 3 were not successful. Put the problems into groups so that the chapter can identify the overarching themes. Example: Problems with communication, problems with type of activities, problems with dates and times, etc.
9. **Examine the members who are actively involved in the chapter.** What could be done to actively involve other members of the chapter? Every member wants to feel they are of value and they have something to contribute to the chapter. Look and see if all voices are being heard. Make sure the members feel valuable and that they are contributing. Make a list of who is responsible for different activities in the chapter. Is the work of the chapter distributed evenly?

Plan

Tackle the problems the chapter is facing and plan activities that will help the chapter get to where it wants to go.

10. **Identify how members can help to improve the chapter.** Here are a few ideas:
 - Past officer advisory committee- Past officers who are no longer on the executive board will gather once a month with the current executive board and help solve problems and/or offer suggestions.
 - Lead a signature pledge class project- Utilize one member from each pledge class to support their pledge class service project. This can run over the course of several semesters or years depending on when members graduate.

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- Senior class project- Have the chapter's seniors lead a special project. It could relate back to their pledge class or be something meaningful they have experienced while in the chapter.
- Strengthen committees and committee structure- Experienced members have leadership skills that are valuable to committees. Having older members as part of a committee is a way to pass along leadership skills to younger members, as well as enhance the structure of the committee.
- Reduce service hours based on year in school- If experienced members are having trouble staying involved with the chapter because of their course loads and other commitments; reduce the number of service hours members with X number of semesters of active involvement need to complete.
- Senior sendoffs/Senior Wills- A fun activity for seniors to is to give away their APO "memories" and/or memorabilia. These seniors can "will" these things to younger members. The chapter can also do a send-off, an accumulation of the senior's accomplishments in the organization.
- Enhanced end-of-year programs to entice members to stay active throughout the semester- Hold events that the entire chapter likes and is excited for at the end of the semester. Requirement for entry or being able to participate is to be an active member of the chapter for the entire semester/year.
- New active member education session/refresher courses for all members- Hold one or two sessions each semester that are geared toward the new active members of the chapter. Have this time to review things that may be confusing in the chapter. Being an active member is now different from being a pledge, and just because one is an active member does not mean they remember and know everything. Give new actives a chance to learn from the older and wiser actives.
- Provide education to all members in the chapter- Hold education sessions about the chapter and Fraternity traditions. These sessions are helpful for pledges, new active members, and members who are looking to change things or do things differently. These sessions are a great way to make sure everyone in the chapter is on the same page about a topic. Example topics are: chapter offices and how to run/apply for them; chapter rules and how to change them; chapter meetings and what/why are they structured the way they are; and Fraternity programs such as [CAPS](#), [National Service Week](#), [APO LEADS](#) and [National Convention](#).
- Provide non-APO related education- Have more experienced members assist other members with writing resumes and job hunting skills. These individuals can also run a workshop at the sectional conference or for the chapter. They can teach etiquette lessons they have learned while looking for a professional job, help younger members learn how to manage their finances, take part in campus leadership opportunities, or organize fellowship such as a book club or day trip to a local/regional historical site.

11. **Plan activities for the chapter to combat the problems identified.** Planning activities that address needs of members that are not being met, identified in Appendix A, is the most

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important step. Use a four-step approach (Appendix B): Learn, Develop, Incorporate and Sustain, to help decide which activities assist the chapter in meeting the members' needs. The four-step approach is used to address the three reasons members remain involved with APO--personal growth, camaraderie, and a sense of purpose. A strong retention program will address all three areas. The attached rubric (Appendix B, Sample) will assist you in finding out how the chapter implements each step in relation to the reasons members remain involved with APO. Utilize the blank worksheet to identify what the chapter is already doing in each of these areas then identify steps that can be taken to improve.

- i. **Learn:** First, members need to learn about the Cardinal Principles. Much of this education takes place during the pledge program. This education should cover what leadership is, what it means to be a good leader, what it means to be a good friend, what qualities good friends have, effective communication, appreciation for diversity, our ideals in APO and how they provide the sense of purpose that drives our actions. The dedication brothers have to service and the Fraternity is for life. Examine the pledge program to see how it incorporates education about the cardinal principles, and make revisions as necessary.
- ii. **Develop:** Members must also develop the skills necessary to live by the Cardinal Principles. Utilize leadership development programs within the Fraternity and on campus. Many schools have a leadership office or staff members in the student organizations office that can present leadership development workshops or prepare customized presentations for student organizations. Provide opportunities for all brothers to build friendships with all pledge, active, associate and advisor brothers, and when possible, with honorary and alumni brothers. Utilize the service program as a means of building friendships and developing leadership skills. Additionally, doing service helps develop and reinforce a sense of purpose.
- iii. **Incorporate:** Be sure the chapter is practicing what is preached. Keep decision-making open and transparent by including the entire chapter in the process. Check that brothers are maintaining their academic obligations. Provide opportunities for brothers to develop friendships with brothers from other chapters. Create a time for brothers to share the ideas, thoughts, and meaning they found in serving others that keeps them motivated. Sharing these experiences will help motivate others.
- iv. **Sustain:** In addition to building up new members in understanding of the Cardinal Principles and helping them find reasons to stay involved with APO, older members who already carry this knowledge must continue to be challenged or they will leave. Since each person has her or his own individual needs for growth, provide ways for each individual to meet their goals. Recognize them when they meet those goals. Make an effort to reach out to brothers who are still on campus that have fallen away from the chapter. Use rituals and celebrations to reaffirm the purpose of APO in our lives. Practice appropriate brotherly behaviors and wear the Fraternity insignia as appropriate.

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12. **Identify the goal of each activity planned.** What should be accomplished by planning and doing this activity? Why is this activity being held? For example: Having an end-of-the-year banquet. The purpose behind having an end-of-the-year-banquet is to appreciate the hard work and leadership the chapter has developed over the past year. Utilizing a committee to help plan this function will help retain members by getting them involved in the planning of the chapter. The event is being held to increase the chapter retention.
13. **Identify resources needed to plan the chapter's events.** Using the right resources can make the job that much easier on the chapter. Someone once said, "There are tools for the job... you don't use a chainsaw to cut a birthday cake. It'll do the job but if you look around you at all of the cake-covered people, you might have found that you could have done a better job with a cake knife." Think about what will be the most effective use of your resources. Do not forget the human resources needed such as brothers, advisors, sectional and regional staff, chapter alumni, and/or university staff.
14. **Create a timeline or schedule for implementation.** For example, you can utilize a Gantt chart as taught in the APO LEADS Course Serve.
15. **What to do after plan is complete:** After the plan is complete, fill out the last page of this document evaluating this program. In order to make this program the best it can be, the Fraternity needs your feedback. Send the last page to the National Office at:
Alpha Phi Omega
Attn: Director of Educational Programs
14901 E. 42nd St
Independence, MO 64055

Implement

It's time to put the plan into action!

16. **Communicate the activities the chapter has planned.** Delegate the roles and tasks to be completed for each activity. Utilize the entire chapter. As you implement the plan make sure you utilize all the resources that are available. Utilize big brothers, or a type of mentoring program within the chapter to assist with motivating chapter members to participate in plans.
17. **Keep the chapter informed and involved in the planning and organization of the activities.** Utilize a backup plan if necessary. Be flexible to change. Communicate the plans to each chapter member, and make sure they understand what their parts in the plans are. Make the plans a part of the chapter so that by participating in these activities, it is not taking away time for members to complete their other chapter responsibilities.

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Evaluate

18. **Evaluate your activities:** Were the goals of each activity met? Do not wait until the end of the year to evaluate an activity. Evaluate the process mid-way through, and decide if you are accomplishing your goal. Determine specific times for evaluation. Choose times that are appropriate for different aspects of the retention program. For example, it is reasonable to evaluate specific events after they occur. However, some programs, like leadership development, will have longer-lasting effects. Touching base with participants a semester or a year later to see how the program affected them is appropriate.
19. **What can be done differently next time to make the activity better?** Some programs are ongoing and can be evaluated throughout their implementation; still others may require lots of planning and evaluation of the program *prior to* its implementation. It is important to evaluate what you are doing, and revise plans if necessary.

Just as each chapter should evaluate and revise their programs, the National Fraternity does much the same thing and each chapter's feedback is critical. Do not forget to complete step #15 so this process can be revised as necessary.

Utilize the Chapter Assessment and Planning Session ([CAPS](#)), but do not wait until CAPS when more frequent evaluations are appropriate. Then, revise and improve the plan as necessary.

Remember: just because it has "always" been, done one way does not mean that it must continue to be done that way. If it is not working, fix it!

Finally, give recognition to those who have helped along the way. Public recognition for a job well done is a rewarding experience. Utilize Fraternity awards such as Distinguished Service Key, sectional and regional awards, and certificates of appreciation, as well as chapter awards to recognize brothers who have gone above and beyond

Acknowledgements

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- National Membership and Extension Committee

Membership Retention Program

Evaluation of Membership Retention Program

At the conclusion of planning your Membership Retention Program, please fill out the following evaluation to provide feedback on your experience. This information will be used to revise and update the program in the future.

Chapter _____ College _____

Total # of active members _____ Total # present during planning _____

Total # of advisors _____ Total # present during planning _____

Total # of others _____ Total # present during planning _____
(pledges, associates, etc.)

The following played a leadership role in planning the Membership Retention Program (facilitator, small group leader, speaker, etc.). Indicate how many and list names of specific people. (please attach additional sheets if necessary.)

Chapter Officers _____ Chapter Advisors _____

Sectional Leaders _____ Other (explain) _____

Additional areas the chapter suggests should be added to the session are:

Part(s) of the session the chapter suggests should be removed from the session is:

Part(s) of the session that was most valuable to our chapter:

Part(s) of the session that was least valuable to our chapter:

Other comments: (please attach additional sheets if necessary. If individuals want to comment, please submit these but be sure to indicate that these are individual views.)

Send this page and comments to the National Office:

Alpha Phi Omega

Attn: Director of Educational Programs

14901 E. 42nd St

Independence, MO 64055

Appendix A: Retention ~ Basic Needs Assessment Worksheet

	Basic Needs	How to give it to them	What to do if they don't get it	Wants
New Brother				
Elected Brother				
Senior/Older Brother				
Advisors				

Appendix B: The Four Step Approach

Why Member Stay? <i>Sample</i>	Growth (Leadership)	Camaraderie (Friendship)	Purpose (Service)
	Use the questions in the boxes below to assist in identifying how the chapter provides experiences to the members.		
Learn (Pledge/New Brother)	How does the chapter provide opportunities for brothers to develop their leadership skills and knowledge from an educational standpoint?	How does the chapter provide opportunities for brothers to learn about brotherhood and friendship, including appreciating diversity; how to be a friend; how to communicate and listen effectively?	How does the chapter remind brothers of the ideals of Alpha Phi Omega and how they provide the sense of purpose that drives actions?
Develop (Active Member)	How does the chapter provide opportunities for utilizing, practicing, and further developing leadership skills through participation in the chapter? In the Fraternity?	How does the chapter provide opportunities for each brother to befriend and build a brotherly relationship with active, pledge, associate, advisory and, when possible, honorary and alumni members?	Doing service together builds common bonds, fosters brotherhood, provides leadership opportunities, and reinforces sense of purpose. How does the chapter do this?
Incorporate (Elected Brother)	How does the chapter provide opportunities for each brother to participate in and/or observe the decision making and administration of the chapter? How does the chapter check that brothers are meeting their academic obligations?	How does the chapter provide opportunities for brothers to visit and develop friendships with brothers at other chapters?	How does the chapter provide opportunities for brothers to exchange ideas, thoughts, and stories about the meaning they found in serving others to keep each other motivated?
Sustain (Senior/Older Brother)	How does the chapter provide opportunities to help each individual meet their growth goals, according to their individual needs? Both in APO and outside of APO, preparing themselves to get a job after graduation.	How does the chapter make efforts to reach out to brothers still on campus who have fallen away from the chapter? Possibly reconnect with their pledge class. And does the chapter have celebrations/rituals to reaffirm the purpose of Alpha Phi Omega in lives?	Does the older members in the chapter practice appropriate brotherly behaviors and wear fraternity insignia? Does the chapter utilize the experiences of older members in training on any number of different subjects?

Appendix B: The Four Step Approach

Why Member Stay? <i>For the Chapter</i>	Growth (Leadership)	Camaraderie (Friendship)	Purpose (Service)
Learn (Pledge/New Brother)			
Develop (Active Member)			
Incorporate (Elected Brother)			
Sustain (Senior/Older Brother)			