SAME Membership Cycle & Understanding Reports

Jill Murphy & Ann McLeod
June 14, 2021
Housekeeping

- Please mute your computer audio or phone during the presentation.
- If you have a question please ask it in the chat box.
- This program is being recorded and slides will be available in the Post Resources Center.

Thank you for joining us today!
National Office Membership & Post Ops Team

• Ann McLeod, Director – amcleod@same.org
• Jill Murphy, Senior Manager – jmurphy@same.org
• Maggie Helmus, Post Ops Coordinator – mhelmus@same.org
• Katja Watts, Membership Specialist – kwatts@same.org
• Natasha Rocheleau, Assoc. Director, Operations – nroch@same.org
Membership Types

SAME has two types of memberships:

• Individual – this membership belongs to an individual
• Company/Agency/Organization – this membership belongs to the company, agency, or organization
  – Not all employees are included on a company membership. They must contact the National POC for the company to be added.
New Member Onboarding - National Office Activities

• Review new member records to ensure they have a Post
• Send individual new members welcome email message in the first 24 hours
• Send companies a welcome letter (sent to their official POC)
• Send a series of onboarding emails over the first year including: Post Engagement, COI’s, Events, Professional Development, member record maintenance
New Member Onboarding – What Posts Should Do!

- Review new member report every two weeks
- Send a welcome email ASAP!
- Host a webinar about what the Post offers members
- Invite them to the next meeting
- Welcome members at meetings & in newsletters
- Encourage them to get involved in an event or activity

Retention starts the day someone joins!
Dues Rule #1

- SAME National Office collects ALL dues
- If your Post receives a check for dues forward it immediately to: SAME

NEW ADDRESS ➤ 1420 King St, #100
Alexandria, VA 22314

- Until the dues is received the membership will be considered unpaid and becomes inactive and then drops!
Membership Renewal Cycle

- All members renew on an anniversary cycle
- 60 days prior to renewal date: membership invoice is sent via email and mail
- 30 days prior to renewal date: email reminder sent
- On Renewal Date: invoice emailed again
Membership Renewal Cycle

• 30 Days past renewal date: email and past due invoice
  Member becomes inactive if payment is not made

• 60 Days past renewal date: Final email
  Membership drops if payment is not made
  “Reps” contacted to join as individuals if company drops

• 120 Days past renewal date: Win back via phone and email
  Member Rejoins 😊 or  Member Declines 😞
What else does the National Office do?

- Reach out to all non-members attending National Events
- Reach back via phone and email to dropped company & agency members 120 days after they lapse
- Annually contact all UNIF and CIVG dropped members and ask them to rejoin (80% of dropped members don’t know their membership expired!)
- Annual “Spring Clean Up” sent to all members to verify their information.
Monthly Membership Numbers

- Monthly membership numbers are a snapshot in time based on the last day of the month after QC
  - Monthly Streamer reports are found on the Post Resource Center
- Post Membership Reports are real-time and adjust when members join/drop in the database
  - Post Membership Reports are found on your Post Leader Dashboard
Monthly “Streamer” Numbers

Monthly Streamer Numbers are...

• Based on the end of month membership statistics
• Stats are run after monthly quality control has been completed
• Streamer numbers are not the total of individuals in your Post!! Refer to your Post Membership Reports
Post Membership Reports

Membership Reports are...
• REAL TIME! They change constantly
• Never going to be the same as the Streamer number
• Updated so they only show two years of dropped

Use your reports to:
✓ Welcome new members!
✓ Review regularly for renewals & thank members!
✓ Remind “inactive” members to renew before they drop
✓ Do succession planning!
DEMO TIME
Additional Resources!

• Visit the Post Resource Center Document Exchange for ideas, templates and resources: https://www.same.org/Document-Exchange

• Login to your member account and access Post Rosters and information in the Post Leader Dashboard: https://www.same.org/Member-Account
We are here for you! Contact us at

Posts@same.org