



**TAX EXECUTIVES INSTITUTE, INC.**

## **CHAPTER MEMBERSHIP GUIDE**

**Strategies for Enhancing Chapter Recruitment and  
Retention, Membership Value, and Member Participation**

**SECOND EDITION  
INCLUDES 2010 CHAPTER MEMBERSHIP SURVEY**



# TEI CHAPTER MEMBERSHIP GUIDE

## Strategies for Enhancing Chapter Recruitment and Retention, Membership Value, and Member Participation

### Introduction

To be successful, organizations such as the Tax Executives Institute must continually recruit new members, and persuade existing members both to renew and to increase their participation. While TEI's international leaders and staff can facilitate recruitment and retention efforts, the role of the chapters is paramount. Indeed, chapters are undeniably the lifeblood of TEI. Not surprisingly, networking at the chapter level has been identified as the primary benefit of TEI membership, and not far behind are the educational benefits the chapters provide.

Accordingly, the key to successful recruitment and retention efforts lies with the chapters: first, by serving the local needs of members through valuable networking and educational events; and second, by identifying sources of new members and effectively communicating the enduring value of membership to current and potential members.

This membership guide focuses on this second area. Culled from existing chapter practices and best practices from the broader association community, it identifies strategies, tactics, and suggestions to help your chapter:

- Strengthen member recruitment efforts.
- Increase member retention by enhancing (and better promoting) the value of membership through networking.
- Encourage member participation in chapter-level committees and leadership activities, thereby facilitating greater member retention.

*We welcome additional suggestions to be included in future versions of this Guide. Send your ideas and best practices to TEI Membership Director Coleman Kane, [ckane@tei.org](mailto:ckane@tei.org), 202.464.8357.*

## TEI CHAPTER MEMBERSHIP GUIDE

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### First Steps

To increase your membership and maintain an effective, productive, and successful chapter, we recommend the following:

1. Make membership recruitment an ongoing priority for your chapter. (Under TEI Chapter Regulations, each chapter must establish a membership committee.) It may be appropriate to assign an officer/ Board member the responsibility for working with the committee's chair. Target chief tax officers for membership; involve members in recruiting their CTO.
2. Review/update your Membership Committee charter to ensure that it documents the responsibilities and activities necessary to ensure a vibrant, strong, and growing membership. A (non-exclusive) list of responsibilities might include:
  - Serving as an information resource/point of contact for member prospects
  - Serving as the point of contact for members, program speakers, and others who refer member prospects
  - Developing and managing the chapter's member prospect list
  - Following up with member prospects after they attend a meeting
  - Serving as on-site membership contact at meetings and events
  - Arranging mentors for new members
  - Coordinating the chapter's membership activities with TEI's Membership Department.
  - Reporting on membership activities at member meetings
3. Adopt a formal goal of expanding member involvement. Appoint a Board member to evaluate ways to encourage member involvement on an ongoing basis across all chapter activities (committees, leadership positions, meetings, etc.). Look for ways to make programs and participation more attractive to CTOs, who will in turn encourage their staff to join and participate.

### Member Recruiting

1. **Member prospects list** — Maintain a current list of member prospects; contact and monitor prospects; develop and maintain a follow-up plan.
2. **Speaker mining** — Ask meeting speakers to invite clients (potential members) to the meeting. (Some speakers may opt to give you their clients' information and ask you to contact them directly.) Make sure to follow up with the guests after the meeting. Ask speakers to promote the value of membership to non-member clients. (Asking speakers to promote the meeting may encourage inactive members to attend.)
3. **Local network contacts** — Establish and maintain local contacts with accounting firms, law firms, Thomson Reuters, BNA and other vendors. Ask firms to promote the value of TEI membership to membership-eligible clients. (Some firms may opt to give you their clients' information and ask you to contact them directly.) Similarly, consider contacting Institute-level sponsors (e.g., software vendors or professional service firms) to help identify potential members.
4. **Individual promotions** — Follow up on local announcements (e.g., new hires, promotions) to identify potential new members.
5. **Company relocations** — Scan local newspapers and trade journals to identify companies that are relocating or expanding. Assign a chapter leader/Board member to reach out to the chief tax officer and make the business case for TEI membership.
6. **Fortune 1000 representation** — Identify area companies that are not represented in the chapter membership. Add to prospects list.

### Membership Marketing

7. **Membership information table** — Set up a membership table at larger meetings (especially when the event is open to non-members); designate chapter leaders (perhaps on a rotating basis) to take responsibility for recruitment efforts at meetings. Request a supply of membership materials from the TEI Membership Department. Follow-up with non-members after they attend meetings.
8. **Piggyback marketing** — When the TEI Annual Conference or an Institute seminar is held in the chapter's locale, build a membership recruiting effort around the program (e.g., pointing out the member/non-member price differential).
9. **Targeted free look** — Adopt a policy of allowing non-members to attend a limited number of meetings at no cost. Follow up with them after each meeting.
10. **Bring-a-friend** — Encourage members to bring a member-eligible friend or colleague as a guest to one meeting. Target one meeting a year as a special "bring a friend for free" event, and include a pitch for TEI membership. Follow-up with each host/guest.
11. **Institute-level support** — Utilize TEI membership staff for assistance, to provide membership materials, or follow up with member prospects. For larger meetings (especially those where a significant number of non-members may attend), invite an Institute-level leader or staff member to give a presentation on the value of TEI membership.

## TEI CHAPTER MEMBERSHIP GUIDE

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### Member Retention

12. **Member satisfaction** — Conduct periodic member satisfaction surveys. Ask members what they like, what they would change, and what might prompt them to enhance/increase their participation. Ask about the preferred time of day for meetings (commuters often prefer breakfast meetings.) Assign chapter officers/Board members to call each member and invite them to meetings, join a committee, discuss chapter activities, etc.
13. **Members in transition** — Encourage temporarily unemployed members (TUMs) to continue their membership and stay active while seeking a new position. (TUMs may maintain their memberships for up to three years.) Encourage them to use the TEI job bank. Consider organizing informal meetings for TUMs on resume writing, job hunting techniques, etc. (Consider reaching out to executive search firms for assistance.)
14. **Non-renewal debrief** — When a member does not renew, conduct an “exit” interview. Identify the specific reason(s) for non-renewal. Also, what did they value; what can we do to bring them back? Share findings with TEI staff, and consider as a chapter leadership discussion/action item as appropriate.

### Member Assimilation/ Participation

15. **New member welcome** — Assign a chapter leader/member to welcome each new member by phone, and then by letter/email as appropriate. Thank them for joining TEI; invite them to the next chapter meeting; affirm the value of TEI membership. (Note: staff regularly provides new member names.) Follow-up in advance of next chapter meeting.
16. **Engage new members** — At each meeting, introduce new members even if they attended prior meetings as a non-member. (Introduce guests as well.)
17. **Mentor program** — Establish a mentoring program for new members. Assist in identifying areas of interest, participation.
18. **Assess your chapter’s culture** — Does it encourage and motivate members to get involved and to consider leadership roles? Are there opportunities for newer members to expand their involvement and grow into leadership positions? (Do current/former leaders inadvertently “block” or impede member involvement?)
19. **Committee co-chairs** — Establish a co-chair position for each committee. Recruit members to serve as co-chairs (“no heavy lifting required”). It can be an effective way to ease them into future chair/leadership positions.
20. **Involve new members** — Assign them tasks at meetings (greeter, meeting MC, etc.)
21. **Transparency** — Ensure your chapter nomination process is transparent. Continually urge members to get involved. In evaluating potential officers, the Nominating Committee should give due regard to industry, race, and gender, as well as regular participation in chapter activities. Recruit and nominate individuals who will take (and share) responsibility, and who through personality/commitment will encourage others to get involved.
22. **Professional development** — Encourage members to view volunteering as a professional development experience; a resume-building opportunity for volunteer efforts.
23. **Measurable chapter goals** — When setting chapter goals for the year, establish a clear action plan with measurable, achievable objectives.
24. **Cultivate future leaders** — Ask Board members to chat with at least one person they don’t know (or don’t know very well) at every event. Find out more about the person’s interests and strengths, share information about TEI activities, and gauge how that person might contribute in the future.

25. **Recognize good work** — Volunteer recognition and encouragement should be frequent, ongoing, and personalized whenever possible. Consider public recognition at well. Make good use of the Institute's Chapter Meritorious Service Award to single out the efforts of one member each year.
26. **Promote TEI involvement** — Send an announcement of new officers to the local business press, and to each officer's internal communications department. Promote your chapter's community volunteer efforts in local business press.

### Enhance Value of Membership/Networking

27. **Multiple meeting discount** — Consider offering a discount to multiple meeting attendees from one company, and waiving or reducing fees for temporarily unemployed members.
28. **Member benefit** — Consider establishing a differential in event fees for members and non-members (give non-members a financial incentive to join TEI).
29. **Events calendar** — Use local business calendars as a resource to promote and coordinate your meetings. Email your chapter's events calendar to members (and member prospects.)
30. **Employment opportunities** — Promote the Institute's online job bank; share information on job openings with members.
31. **National TEI update** — Keep everyone connected by announcing upcoming Institute-level events and briefing members on key TEI initiatives.
32. **Personal invitations** — Recruit Board members to call members and ask if they are coming to an event.
33. **Minimize costs** — Reassess meeting locations to reduce costs; where possible, hold meetings at a member's facilities or perhaps at speakers' offices. Consider meeting in conjunction with another organization (subject to Institute-level clearance), or with a neighboring chapter as a way to minimize costs and expand opportunities to network.
34. **Keep meetings fresh** — **Formats:** experiment (e.g., informal roundtable, talking heads with member moderator, member speaker/moderator.) **Speakers:** When considering speakers from law and accounting firms, rotate/ alternate firms from time to time to ensure a variety of perspectives (and equal time!), and give due consideration to Institute-level sponsors. Consult with TEI staff regarding timely topics and speakers. **Locations:** Consider rotating meeting sites, especially if your chapter covers a wide geographic area (but gauge the potential effect on attendance).
35. **Ice breaker** — Schedule time for an ice-breaker (preferably before a meeting is called to order) for personal networking and introductions.
36. **Attendee feedback** — Survey attendees at chapter meetings and events; solicit recommendations for future topics, speakers, locations, and meeting times.
37. **Senior management involvement** — Encourage chief tax officers to participate in chapter activities. They can help recruit (and attract) speakers and have a positive effect on attendance. Consider hosting a CTO-level event.
38. **Academic networking** — Develop and sustain relationships with local academics, e.g., tax/accounting/ law professors at area colleges and universities. Invite them to attend chapter events. Offer a chapter officer or other member to speak at local college/ law school career days, especially if the school has an accounting/tax/ business program.

## APPENDIX

# 2010 TEI CHAPTER MEMBERSHIP SURVEY

### Introduction

One of TEI's Membership Goals for 2009-2010 was to "Support chapter efforts to expand membership and enhance opportunities to participate." Executive Committee members Kelly Nall (Dallas Chapter) and Mike Bernard (Seattle Chapter) were given responsibility for this goal.

In support of this goal, an online "best practices" survey was sent to all chapter presidents in the spring of 2010. 26 chapters completed the survey.

The TEI Manual of Organization and Operation (MOP) also contains ideas and practices that can assist chapters in their efforts to increase membership and member participation. The MOP can be found on the About Us page at [www.tei.org](http://www.tei.org).

### Summary of Findings

In the area of member recruitment, inviting prospects to chapter meetings is an approach utilized by almost all respondents. Personal, one-on-one contact with prospective members is also reported as effective. Managing these efforts in a more structured way might prove to be even more productive. (Only one-third of responding chapters maintain an active member prospect list or conduct an ongoing recruitment program.)

To increase member participation, more than 50 percent of respondents reported that they introduce and engage new members at meetings; set term limits for directors and committee chairs; and regularly survey member preferences for meeting times, formats and topics.

### Membership Recruitment

Is your chapter's Membership Committee currently chaired by a chapter officer or director?

Yes	61.5% (16)
No	38.5% (10)

Does your chapter Board set annual goals for membership growth?

Yes	11.5% (3)
No	88.5% (23)

How often does your chapter leadership discuss ways to increase membership?

At least once a year	88.5% (23)
Infrequently	11.5% (3)

Does your chapter actively maintain a list of member prospects?

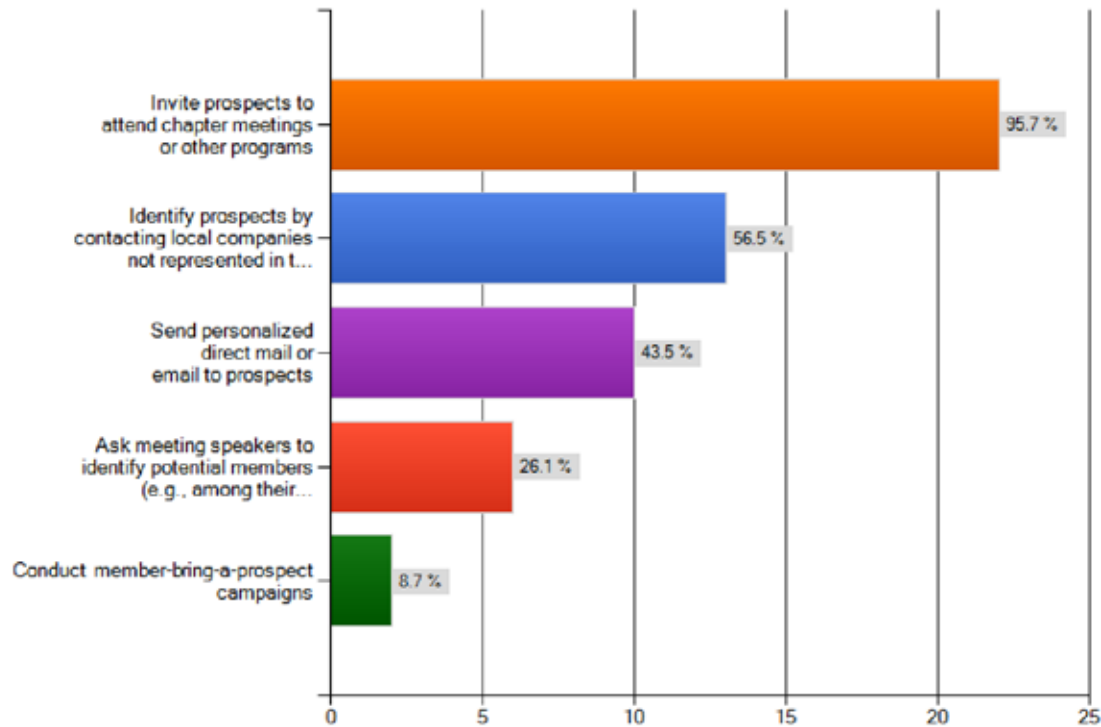
Yes	30.8% (8)
No	69.2% (18)

Does your chapter have an ongoing member recruitment program?

Yes	34.6% (9)
No	65.4% (17)



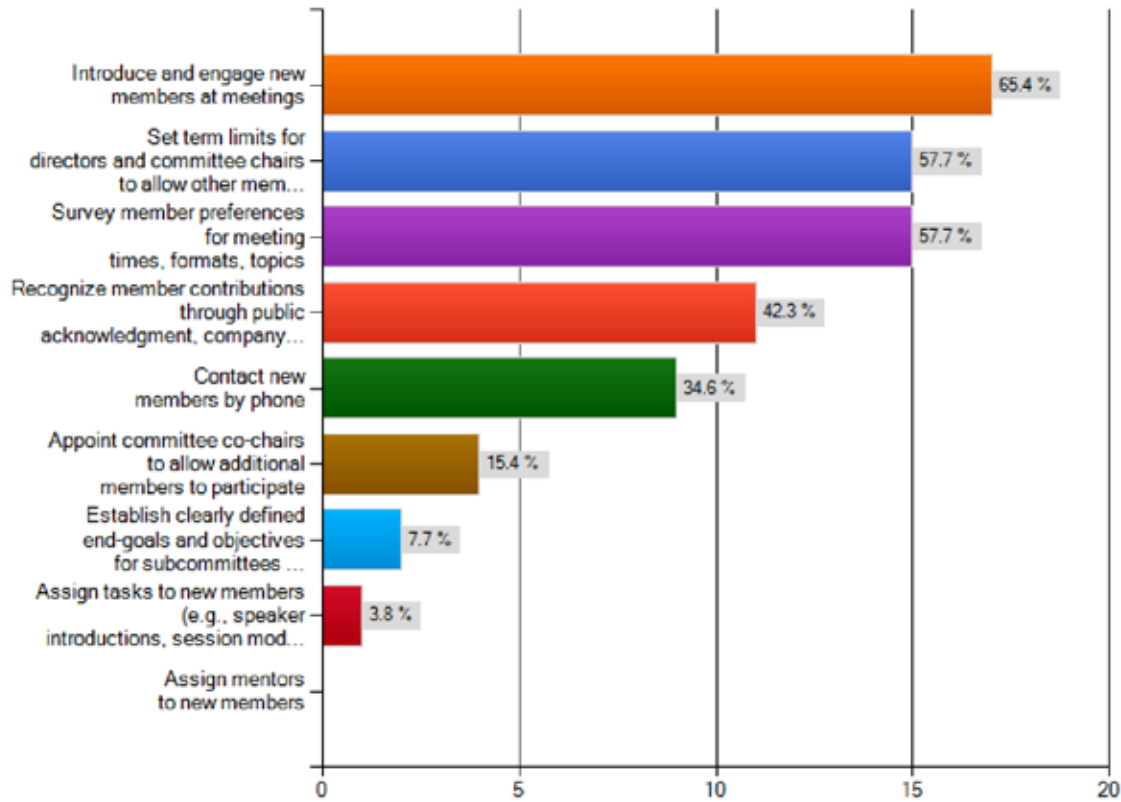
**Which of the following initiatives has your chapter implemented (currently or in the past)?**



## Other Responses

1. Collect business cards at seminars and conferences and follow up on prospects.
2. Invite members (and guests) to invite others to our meetings; discuss TEI's role in introductory remarks.
3. Tax Research product sales reps have been a source of referrals for our chapter.
4. When we receive an inquiry, our Membership Committee Chair sends out information for our last or upcoming meeting, along with our last Chapter newsletter, membership information and a link to the TEI membership application.
5. TEI membership information is regularly made available at Chapter events, and attending guests are encouraged to join.
6. Subsidize 1st year membership fee for new members.
7. In the past we held a membership drive and offered current members free attendance at two chapter events in exchange for referring membership candidates.
8. We have a space on our post-event survey form for non-member attendees to provide their contact information if they are interested in becoming a member. We follow up on every prospect with an e-mail or phone call and application instructions.
9. We encourage member companies to allow multiple TEI members in their organizations.
10. Call or email a prospect and invite them to attend a meeting free for the experience. Especially encourage this for our social outings so they get to know members.

### How does your chapter encourage member participation?



1. We try to provide good, relevant meetings and get the word out to as many as possible and allow networking and socializing time before and after meetings.
2. Choose meeting locations that are conveniently located.
3. Rotation through the officer ranks or regional roles.

### In your chapter's experience, what has been the single most effective initiative in recruiting new members? (unranked responses)

1. Inviting prospects to attend chapter meetings.
2. Using the network of contacts, especially by members of the Board.
3. Direct discussion with potential members regarding the benefits of attending activities.
4. Hosting seminars and conferences relevant to the needs of the in-house tax community in Asia, co-sponsoring events and providing substantial discounts for members.
5. Because our chapter is small and the number of companies that have tax people on staff is limited, we've found that our most effective initiative is using current members to invite prospective members to chapter meetings.
6. Workshops targeted at staff serve to inspire younger tax management to ask for TEI membership.
7. Providing quality education opportunities and promoting membership at the events.
8. Contact from the chapter president or Membership Committee Chair.

9. If we can get people to come to a meeting free of charge to see the quality of our CPE and networking opportunities, that makes a lot of difference.
10. Direct, personal approach. Ask members with an existing relationship to encourage the recruit to join TEI.
11. Most membership growth is generally from within companies with preexisting TEI members. Our chapter programs are widely advertised within these companies. Many attendees of chapter programs attend as guests of members, and then become members themselves as they learn more about TEI.
12. Personal contact of the prospect by one of our members with an invitation to attend our meetings during the current fiscal year for no charge.

## **Member Participation**

13. How often does your chapter leadership discuss ways to encourage and increase member participation?

Several times a year	50.0% (13)
At least once a year	34.6% (9)
At every meeting	11.5% (3)

## **Other Responses/Elaborations**

1. Newsletter promotion of programs; repeated Newsflash Email program invitations; emphasizing CPE/CLE value relative to cost.
2. While we do not have formal “term limits” for committee assignments, our chapter frequently rotates committee assignments as leaders move up the ranks through officer positions. We continually encourage new members to engage in leadership roles.
3. Recruit members to help organize a technical program.

## **In your chapter’s experience, what has been the single most effective initiative to increase member participation? (unranked responses)**

1. One-on-one encouragement. Sell the benefits of taking a leadership role.
2. Roundtable lunches and small gatherings to promote participation.
3. Setting term limits for directors forces new leadership to emerge.
4. Follow up on those who express an interest in getting involved or helping out.
5. For the first time in many years, we are in the process of soliciting members from non-member companies.
6. Our chapter’s most effective initiative has been using current members to invite prospective members they know to chapter meetings.
7. Relying on an officer/director, who has a relationship with the member, to discuss participation has been most effective for us.
8. Simply ask people who are not involved if they would like to be involved on a committee or the Board.



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