

CALIFORNIA ASSOCIATION OF HEALTH UNDERWRITERS

POLICY & PROCEDURES

ARCHIVE

POLICY TITLE: Membership Retention & Renewal

CLASSIFICATION: Membership

POLICY NUMBER: 4001

COORDINATOR: VP of Membership

MOTION:

SECONDED:

DATE SUBMITTED (INITIAL):

DATE APPROVED:

APPROVED BY:

AMENDED:

REVIEW: 2012

PURPOSE: Establish policies and procedures by which CAHU's Membership will be maintained and managed.

POLICY: CAHU will employ the use of a contracted Membership Administrator to assist the VP of Membership and Membership Retention Chair in tracking and maintaining CAHU's Membership.

The VP of Membership will establish annually the membership recruitment, retention, and performance goals to be achieved over the course of each fiscal year.

CAHU will provide ongoing support to its local chapters in the form of tools, resources, best practices guide, training, workshops, monthly teleconferences, events, contests and blitzes.

PROCEDURE(S):

CAHU Membership Administrator will:

- Work with the CAHU Vice President of Membership to develop and administer membership contests and promotions; track and communicate contest results to the chapter Membership Chairs; insure that promotions are implemented as publicized
- When requested by CAHU Vice President of Membership, assist with development of new tools designed to recruit and/or retain members
- When requested by the CAHU Vice President of Membership, research affinity programs and other types of membership benefits that can be offered to CAHU members only; promote existing affinity programs to increase member usage and generate additional revenues
- Schedule and provide staff support for monthly conference calls; develop agendas that attract participation; provide training on CAHU's online Membership Database during scheduled conference calls.
- Personally contact non-members who attend CAHU and local chapter events and encourage them to join
- In conjunction with the CAHU Vice President of Membership, obtain lists of prospective members; develop and send mailings targeting these prospects; continue to work the lists and report the results to the CAHU Vice President of Membership
- As requested by local chapters and with approval of the CAHU Vice President of Membership, plan and coordinate organizational meetings with the goal of forming new chapters in areas targeted by CAHU; obtain lists of brokers in target areas and develop relationships with brokers in those areas to stimulate interest in forming new chapters
- As requested by local chapters, organize membership phone banks; obtain prospect lists, arrange for the phone bank location, and obtain commitments from local chapter leaders to work the phone banks; pick up membership applications from new members recruited during phone banks on the same day
- Depending on available time, the willingness of local chapters to share in the costs, and approval from the CAHU Vice President of Membership, plan and coordinate satellite meetings for the local chapters to enhance the services and benefits that local chapter membership provides

Membership Retention:

CAHU Membership Administrator or Membership Chair (if appointed) will:

- Contact individuals whose memberships have lapsed and encourage them to renew; report the results of these contacts to the local chapter Membership Chairs and CAHU's Vice President of Membership
- Organize membership forums and special membership training sessions at the annual CAHU Sales Conference; market and promote attendance at these forums
- Assist local chapter leaders with getting new members involved and engaged in local chapter activities to increase the likelihood of retention

FINANCIAL IMPACT:

Contracted expense of Membership Administrator and related direct expenses such as supplies, travel, postage, phone, etc. to conduct these activities as stated above.