

### Executive Forward

This plan documents INCOSE-LA chapter 2017 membership goals, resources, implementation approach, and procedures. The goals are:

* Maintain a stable membership level increase
* Reduce the amount of 1 year memberships
* Support INCOSE International membership goals
* Maintain chapter award membership points
* Increase individual, local CAB, and student member participation in chapter activities

This document, when properly submitted as part of INCOSE Chapter Awards, fulfills the requirement for chapter membership recruiting and retention plan. The procedures documented herein provide for continuity-of-operations by new volunteers.

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# Planning Background

The INCOSE-LA chapter plans strategy, annually from mid-January through mid-April. This includes updating and approving the chapter membership plan. The intent is to establish SMA RT goals (Specific, Measurable, Attainable, Realistic and Timely) and track their attainment.

This document, when properly submitted as part of INCOSE Chapter Awards, fulfills the requirement for membership recruiting and retention plan. The procedures documented herein provide for continuity-of-operations by new volunteers.

INCOSE-LA strategic planning and execution continues throughout the year. To maintain alignment with related chapter strategic plans, the chapter may occasionally update the membership plan.

* 1. 2016 Achievements

The 2016 Membership Plan objectives were to improve membership recruiting, retention, and renewal rates. The plan sketched approaches for each sub-objective.

INCOSE-LA maintained current membership levels as 2015 with the following rough numbers for each month of 2016:

* + - New member acquisition was maintained
		- Larger number of members were not retained
		- Achievement – 111 new members
		- Reach 434 members



Figure 1. 2016 INCOSE-LA Membership Statistics

* 1. 2017 Goals

INCOSE-LA 2017 membership goals, in priority order, are:

I. Membership retention and growth

* + 1. Increase renewal rate to 50% or more
		2. Continue to add new members at 20% increase
		3. Recruit new members at each event
		4. Understand massive membership expirations – follow up letters
		5. Re-engage with CAB companies and ambassadors
		6. Develop a campaign to reacquire expired members
		7. Create campaigns to generate new members on historically slow months
		8. Generate more “member retention” programs
			- Groups w/in the chapter (ex. Hi tech, continued educations, motorcycle enthusiasts, etc). Focus – offer more to our members, generate more internal leaders
			- Quarterly Socials w/ a vendor presenting
			- Self-promotion – area where members can promote time they have to donate, special skills, etc. for other members to utilize…hence benefitting members to be involved
1. Establish INCOSE presence in work areas
	1. Cultivate Ambassadors at companies and universities
	2. Cultivate Ambassadors at professional organizations
		* COE, SW Univ, Mentor U
	3. Provide tools and promotions for the Ambassadors (signage, business cards, handouts, buttons)
	4. Emphasis on *individuals,* not just the organization in general
2. LA & CAB Companies work actively together
	1. Deliver new Ambassador training in H2 2017
3. Reinvigorate student divisions (USC, LMU, UC)
4. Add 2 new student divisions
	1. Focus on a CA state and specialty
5. Monthly, e-mail and/or call members to remind those members whose membership is due for renewal. Follow-up with those that do not renew to learn why and what can be done to keep or increase their interest or involvement.
	1. Develop a survey monkey for non-renewals
6. Specifically, contact members with 10+ years or more membership who have allowed their membership to lapse and invite to return. Learn why they have lapsed.
7. Focus more on Social media to promote events, groups, etc. to create buzz and move INCOSE events to the front of member’s calendars.
	1. Chapter Activity Award Points

The development and publication of a Membership Plan for INCOSE-LA that includes recruitment, retention, survey & analysis of non-renewals will result in recognition points being awarded. Additional points for membership activities are listed in Table 1. Chapter Award Points.

Additionally, I plan on developing a rewards program for non-board member contribution to CAP. To have members more involved they need to be involved. Currently, all award points are essentially captured by work of the board. Firstly, this is not fair to have this burden on the board and more importantly it doesn’t involve the chapter.

**Table 1: Chapter Award Points**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Activity Description | Points per Activity | Max Pts | Required Documentation for Verification |
| E1 | Hold Membership Drive Events | 500 points per event, maximum of two events can be claimed per year | 1000 | To achieve full points the chapter must hold an event or social event specifically intended to be a recruiting opportunity.  |
| E2 | Increase the Chapter Membership | 100 pts for every 2% increase in membership | 500 | To achieve full points the chapter must provide a list of new members and join dates. Calculated on the calendar year using the membership at the start of the year as the basis. |
| E3 | Track and maintain retention levels | 300 points for maintaining a retention rate of 75% or above200 points for maintaining a retention rate of 65 – 74%100 points for maintaining a retention rate of 50 – 64% | 300 | To achieve full points the Chapter must provide a worksheet showing how they calculated their retention. |
| E4 | Publish new member name and brief introductory information such as company of each new member in the Chapter newsletter or on the chapter website. | 25 points max per newsletter, or on website in a calendar month-10 pts for just the name-25 pts for name and other info | 300 | To achieve full points the chapter must provide1. Acknowledgement of new members by publishing as a minimum their name, some info, and
2. A copy of the newsletter with section related to the new member information identified or link to info on website
 |
| E5 | Start of support a Student Division at a University | 1. 100 points for each student division
2. 50 points for each student division website
3. 100 points for each IUSE campaign
4. 25 points for each student attending INCOSE IS
5. 50 points for each Systems Engineering Product
6. 10 points for each active student
 | 1000 | To achieve full points the chapter must provide:1) Approved Student Division Constitution2) Site current and linked from the Chapter Website3) Photos, articles of sponsors, evidence of participation by members of all stakeholders4) Names5) Products can be posters, papers, or physical products published in journals, symposia proceedings, or presented at SE sponsored meetings6) Photographs or activity, meeting roster or presentation made to student groups,  |
|  | Summary Allowed for Membership |  | 2500 |  |

# Implementation Approach

This implementation approach involves maintaining and growing the membership through individual contact and broader industry and professional activities. Key to this approach is maintaining a stable membership, maintaining the chapter award membership points and increasing active membership participation.

* 1. Maintain Stable Membership

Maintain stable chapter size by retaining current members and recruiting new members. Both aspects share a two-pronged approach: identify value of membership and communicate that value.

Communicate & deliver value:

1. Ensure our members are aware of our value
2. Introduce "first time" event attendees to active members (especially Board-of-Directors and volunteers), recognize them during announcements (prior to presentation)
3. Send a notice to new members about upcoming events
4. Offer free Chapter Reflector e-mail subscriptions to al l (demonstrate value)
	1. Invite new members to subscribe
	2. Publish offer in Newsletter, on web site, other venues (conferences, etc.)
	3. Consider RSS feed, Post Chapter-Sponsored Event on Linkedln
	4. Maintain Chapter Award Membership Points

Chapter award points provide a reasonable gauge of chapter vitality.

Quarterly update of chapter award efforts to minimize missed opportunities and reduce end of year scramble.

Augment chapter awards membership factors:

1. Annually, Membership Director (MD) updates recruiting package. Review current package, update as needed. Assemble in a folder with cover. Distribute at events. Display recruiting materials at Chapter meetings and conferences.
2. Monthly, MD performs renewal procedure, including sending renewal reminders, contacted lapsed members, and obtaining lapsed member feedback.
3. Annually, MD surveys member demographics, including conducting survey, publishing results, and analyzing results.
4. Monthly, MD surveys member satisfaction, including conducting survey, publishing results, and analyzing results.
5. In monthly newsletter. Editor prints new recruit names and brief biographic sketch.
6. MD investigates prospects of recruiting new CAB members.
	1. Document successful planning and activities with local CAB members. Each CAB representative to provide evidence to MD and awards representative. Includes planning and activity to obtain CAB sponsorship of chapter in general, particular events, for member activities and for recruiting new members.
	2. MD investigates prospects for recruiting new local CAB member.
	3. Document successful planning and activities with local student divisions. Each student division representative to provide evidence to MD and awards representative. (The Student Ambassador is responsible for this.)
	4. Increase Active Participation

Increase active participation by members in chapter activities:

1. Advertise slogan: "The more you put in, the more you get out".
2. Develop mentoring/buddy system to increase member participation.
3. Develop “Groups” to create more “active” members/ leaders.
4. Develop "Bring-A-Friend" to free meetings approach for members to actively recruit new members.
5. "Ask not what your chapter can do for you; ask what you can do for your chapter." - a former chapter president
6. Member recruiting challenge w/ awards (would like to discuss at the next SPM)
7. Increase in Social Media use for events, especially social events to promote and gauge potential participation.
8. Create a new reflector invite in HTML.
9. Provide rewards for non-board members to contribute to points.

# Procedures

The procedures documented herein provide for continuity-of-operations.

* 1. Renewal

Remind members that renewal is coming due:

**Table 1. Renewal Procedure**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| STEP | WHEN | WHO | WHAT | NOTES |
| 1 | Annually – 30 days before  | Webmaster | Email notification | Auto-gen by HQ |
| 2 | 45 days after lapse | Webmaster | Email notification | Auto-gen by HQ |
| 4 | 30 days after lapse | Dir of Mem | Email notification asking reasons why member hasn’t renewed | Identify reasons for non-renewal |

* + 1. Remind lapsed members that renewal is overdue:
			1. Remind members organizational dues may be covered by their employers!
			2. Quarterly, membership director reports metrics on membership lapses and reasons provided.
		2. Survey lapsed members to identify reason(s) for non-renewal
			1. Membership director mails survey requesting reason for lapse (moved out of region, no longer in SE, inconvenient, no value, etc),
	1. Retention
		1. Retention Approach (the key is personal value)
			1. Improve value of Chapter to the members
			2. Improve the relevance of Chapter meetings
			3. Ask members to attend a few of the SPM meetings
			4. Solicit feedback from meeting attendees (brief meeting evaluation form)
			5. Improve the relevance of tutorials
	2. Solicit feedback from professional development tutorial attendees (brief tutorial evaluation form)
		+ 1. Publish new members’ names in Newsletter with affiliation
1. Introduces new members to active Chapter members
2. Ask new members if they would like their BIO posted in the newsletter
3. Ask new members if they would like their email included in the posting
4. Encourages active members to greet and welcome new members
	* + 1. New members contacted to become active volunteers in Chapter activities
	1. Send welcome message to new members
	2. On-line meeting reservation offers opportunity to volunteer
	3. Greet & announce names of new members attending Chapter meetings.
	4. Offer small well-defined tasks to encourage volunteer participation.
		* 1. Before each event, review meeting registration list(s) for indications of willingness to volunteer, contact these people during check-in, and personally introduce them to members needing help with Chapter activities.
	5. Strive for consistency in mailing addresses to improve the quality of contact information and simplify Chapter Newsletter mailings.
	6. Participate in upgrades & testing of enhancements in INCOSE membership records system.
	7. update membership materials:
		* 1. Annually, MD audits the existence and on-line existence and accessibility of membership records
			2. Annually, MD updates membership records for accuracy (such a list of chapter officers)

9)

Obtain member feedback:

* + 1. Manage renewal workload by predicting number of lapsing members each month.
		2. Enhance accuracy and quality of member information in the INCOSE membership records system (critical to member Renewal process)
1. Detect errors in mailing addresses, both USPS and e-mail. Identify needed corrections; provide updates via Excel spreadsheet to HQ.

10)

Membership Products To Be Developed in 2017

* 1. Member recognition certificate and letter for long-time members
	2. HTML based invites for all meetings, socials, etc. that are external BOD items
	3. Lapsed Member Scripts & Surveys
	4. Reporting
1. Maintain tracker spreadsheet:
	1. Annually, MD updates plan data in tracker tool.
	2. As needed (about monthly), MD updates actual data in tracker tools
2. Report membership plan progress to chapter members:
	1. At monthly speaker meetings, MD reports membership plan progress.
	2. Provide chart data and trends. See Figure 2 and Figure 3 for example charts.
3. Report membership plan progress to chapter board:
	1. At weekly board planning meetings, MD reports membership plan progress.
	2. Provide verbal or textual data and trends
	3. Monthly, BOD call will dedicate time to the membership plan and needed actions.
4. Report membership plan progress to INCOSE
	1. As available, MD provides chapter awards coordinator evidence of membership factor attainment.
	2. Annually, chapter awards coordinator submits chapter award claim, including membership factors.
	3. Recruiting Approach

3.4.1 Work with webmaster to keep the Chapter web site http://www.incose.org/los-angeles keep it current to attract repeat visits

l) Ex plain value and benefits of INCOS E membership

2) Highlight Chapter meetings, conferences and seminars

3.4.2Offer free Chapter Reflector e-mail subscriptions to all

 1) Demonstrate value

* 1. Invite new members to subscribe
	2. Publish offer in Newsletter, on web site, other venues (conferences, etc.) 3.4.3 Host Chapter meetings at multiple corporate sites
		+ 1. Encourage members to invite colleagues to meetings at local sites
			2. Advertise meetings on the INCOSE LA website
		1. Display INCOSE-LA Banner at Chapter meetings and conferences 3 .4.6 Display recruiting materials at Chapter meetings and conferences
			1. INCOSE pamphlets & sample publications (free from Hq)
			2. Past and Upcoming Chapter meeting flyers
			3. Past and/or Upcoming Conference flyers and proceedings
			4. Present non-member event attendees with membership packet to encourage joining INCOSE
			5. Provide promotional items (bookmarks, pens, flyers, post-it pads, stress-relievers)
			6. Develop and print Chapter Business Cards (for free Reflector subscription) 3.4.6 Introduce "first time" event attendees to active members

1) Especially BOD and volunteers

2) recognize new members during announcements prior to presentation

* + 1. Continue use of Social Networking Sites (Facebook, Twitter, Linked ln, etc.) to present INCOSE-LA to local emerging professionals
			1. Encourage members to join INCOSE-LA on Facebook; accepts fans but is otherwise idle
			2. INCOSE-LA is active on Linkedln, post events when Reservations are available
			3. Ask members to recommend free chapter e-mail reflector subscriptions
		2. Continue to work with technical organizations to create new type of CAB members
		3. Develop methodology to approach local companies for support and to solicit new members.

# Glossary

Table 3 lists acronyms used in this plan.

**Table 3. Acronyms**

|  |  |
| --- | --- |
| BOD | Board of Directors |
| CAB | Corporate Advisory Board |
| INCOSE | International Council on Systems Engineering |
| LA | Los Angeles |
| MD | Membership Director |
| SASE | Self Addressed Stamped Envelope |
| SE | Systems Engineer, Systems Engineering |
| SMART | Specific, Measurable, Achievable, Relevant, Time-bound |

# INCOSE-LA Membership Identity Privacy Policy

Aside from the publication of the names and companies in the Newsletter, INCOSE­ LA chapter does not disclose membership identification information, except for INCOSE-LA chapter and INCOSE headquarters administration, unless a member signs a form or sends an email message authorizing disclosure.

Names and email addresses of attendees at INCOSE-LA events, such as conferences, are only passed on to sponsors if the attendee has indicated their acceptance by opting-in to receiving contact.

# Active Membership Tracking

The Membership of the INCOSE-LA will be exported from the INCOSE membership list monthly and retained on the chapter connect website for tracking membership numbers. Active members that are nearing a renewal date will be contact and encouraged to renew. Member participation at speaker meetings from the speaker location and the remote locations are maintained.