

A DEVELOPING  
HONOR SOCIETY'S GUIDE TO

# Successful Retention



Sigma Theta Tau International  
Honor Society of Nursing®

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This is a companion piece to A Developing Honor Society's Guide to Successful Recruitment. It is recommended that you download and read the recruitment guide before reading the retention guide.

Both guides and their accompanying resources can be downloaded from the developing honor society's Additional Resources page.

# Table of Contents

|  |           |
|--|-----------|
| <b>Getting Started</b> .....   | <b>2</b>  |
| Membership Life Cycle .....  | 3         |
| Preparing Your Team.....   | 5         |
| <b>PHASE 5: Member Involvement</b> .....                                     | <b>7</b>  |
| Which Types of Members Do You Have?.....                                     | 8         |
| Creating Meaningful Relationships Through Involvement ....                   | 9         |
| Implementing an Annual Member Satisfaction Survey .....                      | 10        |
| Importance of Engaging Volunteers and Creating Volunteer Opportunities ..... | 15        |
| Orienting Volunteers to Their Position .....                                 | 16        |
| Adding Opportunities to Your Developing Honor Society Website .....          | 17        |
| Recognizing Volunteers .....   | 18        |
| Communication Is KEY! .....  | 19        |
| Shortening Attention Span .....  | 19        |
| You CAN Conquer These Obstacles .....  | 20        |
| Mix and Match Communication Methods.....                                     | 20        |
| Why Not Just Send Everything via Mass Email? .....                           | 21        |
| Thinking Ahead to Chapterhood: A Preview of Sigma Resources .....            | 22        |
| How Can You Achieve All of This? .....                                       | 26        |
| <b>Phase 6: Renewal</b> .....  | <b>28</b> |
| What Is the Developing Honor Society Renewal Process? ...                    | 29        |
| What Can Your Developing Honor Society Do? .....                             | 30        |
| Next Steps.....  | 32        |



# Getting Started

*This is your guide to successfully engaging and retaining members in your developing honor society.*

## ***Thank you for serving as a volunteer for your developing honor society!***

Use this text to engage the rest of your developing honor society's board in conversation, and then draft a plan to increase your developing honor society's member-retention activities.

The ideas shared here are meant to have longevity, but there will be future periodic updates to the content as well as to the supplemental materials. The developing honor society should ensure that all leaders' contact information is up-to-date and listed in the board roster so that updates can be shared with appropriate leaders as they become available.

➔ The board roster is located in the online chapter development portal, Board of Directors Orientation section.

Look for the following icon that indicates where you can find samples and additional resources:



Displayed when the mentioned item can be found on the Additional Resources webpages. Links to this webpage can be found in the online chapter development portal.

As you employ the tactics contained in this piece and discover your own best practices, share your successes and lessons learned with staff and in the "additional comments for reviewers" in the online portal.

# Membership Life Cycle

Developing honor societies need to continually generate awareness to recruit, invite, and induct eligible candidates, yet it is important for them to engage established members in a specific way to ensure that they renew their membership each year. These components need to be in constant motion for your developing honor society to create a truly successful and long-lasting membership experience for its members.

*A Developing Honor Society's Guide to Successful Recruitment* lists the first four phases of the Membership Life Cycle:



## PHASE 1

### PHASE 1. MAKING AN INTRODUCTION

The purpose of an introduction is to familiarize the community with your developing honor society's values and initiatives. This area of the Membership Life Cycle asks your developing honor society to develop a value proposition statement, create awareness of your developing honor society, and build your name and reputation in the community.

## PHASE 2

### PHASE 2. RECRUITING NEW MEMBERS

Recruitment is the process of attracting, selecting, and orienting qualified candidates to your developing honor society's experience. This section of the guide provides suggestions for how your developing honor society can build relationships with potential members by creating a welcoming environment and hosting recruitment events.

## PHASE 3

### PHASE 3. INDUCTING ELIGIBLE MEMBERS

After potential new members have been identified and recruited, your developing honor society can issue invitations to those who are eligible. This is a special time for the candidates, because your group is embracing these individuals who have dedicated their time and energy to obtaining invitations. This is also a special time for the developing honor society, because new members bring fresh enthusiasm and energy into the group. Do not forget to utilize the exception clauses to induct as many individuals as possible!



## PHASE 4. ORIENTING NEW MEMBERS

It is important to orient new members so that they become actively involved and form personal, long-lasting relationships with fellow members. This phase sets a positive tone for moving on to the “Involvement” section of the membership life cycle. New developing honor society members fit into one of three classifications:

1. Those who have been recently inducted
2. Those who have recently joined the developing honor society, and also belong to Sigma (through another chapter)
3. Those whose membership has been reinstated after a period of inactivity

After the orientation phase, some leaders focus on starting the process over with making an introduction, while others work to move the new members into the next phases of the Membership Life Cycle.

*This guide focuses on the last two phases of the Membership Life Cycle: Involvement and Renewal. These stages require developing honor society leaders to focus on retention, which is the act of maintaining happy, active members.*



## PHASE 5. INVOLVEMENT

It is important to involve members as early and as often as possible. Members who are involved with the developing honor society are happier and more likely to renew.



## PHASE 6. RENEWAL

Your developing honor society depends on renewing members, not only to offer financial support but to help continue the Membership Life Cycle by introducing you to potential members.

Developing honor societies must have at least 50 active members and have completed one or more renewal cycles in order to submit the Chapter Charter Application.

Renewing members is an important component in reaching the minimum 50 active members and the renewal rate is considered in the reviewer’s evaluation of the application.

# Preparing Your Team

To effectively retain members, your developing honor society needs to rely heavily on volunteers who have the time and skills to form relationships with potential members. When selecting those who will help with member engagement, your developing honor society's Leadership Succession Committee should strive to find individuals who possess the necessary skills. The following volunteers and committees are optional and not required for the Chapter Charter Application. If the developing honor society cannot implement them at this time, consider adding them as future goals.

## THE MEMBERSHIP INVOLVEMENT COMMITTEE

Works to create the ideal membership experience. Those who serve on this committee are also an asset in the recruitment process, because they know which active members will be good advocates for the developing honor society.

*What qualities should people have to serve on this committee?*

- They are social and can easily build relationships.
- They can clearly articulate and communicate the value of your developing honor society to members and potential candidates.
- They can solicit and analyze feedback in a constructive manner.

## THE PROGRAM PLANNING COMMITTEE

Helps plan at least two programs or events each year that meet member needs and support the purposes and goals of Sigma.

*What qualities should people have to serve on this committee?*

- They are familiar with the community, willing to explore new venues for developing honor society events, and comfortable talking with potential sponsors.
- They are organized and comfortable analyzing data, such information that comes from your member-needs survey.
- They are aware of nursing trends and comfortable proposing event topics that members would be interested in attending.

These committees could also appoint task forces to complete specific aspects of their work in a shorter time frame, such as developing member-needs surveys, locating program venues, and much more.

## MEMBERSHIP AMBASSADORS

Serve as liaisons between newly inducted members and the developing honor society.

*What qualities should people have to serve in this position?*

- They are within their first year of membership so that they can relate to and interact with the intended audience.
- They are willing to learn how to use new technological platforms, such as Twitter, Facebook, or the developing honor society website.



## LEADERSHIP INTERNS

Are new members who are interested in getting more involved by becoming “leaders in training” to help current developing honor society leaders complete their goals.

*What qualities should people have to serve in this position?*

- They are good listeners who are willing to be mentored by current developing honor society leaders.
- They are interested in developing their leadership skills.

## WEBMASTERS

Regularly update their developing honor society’s websites or social media accounts with content for both members and nonmembers.

*What qualities should people have to serve in this position?*

- They can analyze developing honor society content and determine a virtual location.
- They are interested in learning new web platforms.
- They can have nontraditional work hours, because web editing can be done at any time of the day.

## NEWSLETTER EDITORS

Help publicize developing honor society events and programs and convey news to members through developing honor society newsletters.

*What qualities should people have to serve in this position?*

- They are skilled writers who can solicit important developing honor society news and information from developing honor society leaders and volunteers.
- They are interested in finding and adapting newsletter templates for developing honor society-specific information.
- They are willing to learn and adhere to the brand guidelines set by the developing honor society.

If people are currently filling these roles but are not listed in your developing honor society’s board roster, contact Sigma chapter development staff so that they can be added.





## PHASE 5: Member Involvement

It is important to involve members as early and as often as possible. Members who are involved with the developing honor society are happier and more likely to renew.

This section will tell you how to develop meaningful relationships with your members by creating and communicating programs and services that meet your members' needs. You'll also discover how to create a realistic action plan to achieve your goals related to membership engagement.

# Which Types of Members Do You Have?

The chart below lists the types of members commonly found in such membership associations as Sigma. Which column do you find most of your members?

| <i>Checkbook Member</i>   | <i>Sporadic Member</i>  | <i>Advocate</i>   | <i>Brand Ambassador</i>  |
|---|---|---|--|
| <ul style="list-style-type: none"> <li>• Writes dues check but does not actively participate in developing honor society events.</li> <li>• Renewal is not guaranteed.</li> </ul> | <ul style="list-style-type: none"> <li>• Occasionally attends meetings or participates online.</li> <li>• Renewal is not guaranteed.</li> </ul> | <ul style="list-style-type: none"> <li>• Gets involved in events, volunteers for committees, and appreciates the value of membership.</li> <li>• Renewal is highly likely.</li> </ul> | <ul style="list-style-type: none"> <li>• Champions the organization's mission.</li> <li>• Renewal is automatic.</li> </ul> |

It is better for developing honor societies to have more members who are in the far-right columns; however, your developing honor society leaders may believe that most of your members are in the far-left categories. You need to convert the checkbook and sporadic members into engaged members, who then become loyal advocates and brand ambassadors.

# Creating Meaningful Relationships Through Involvement

A large part of member involvement should focus on each member's relationship with the developing honor society. It is important to know who your members are and what is important to them so that the developing honor society can work to fulfill their needs. This emphasis helps you create a meaningful relationship.

To get started in developing and maintaining a strong relationship, focus on developing programs, services, and benefits that will benefit your members and engage them frequently.

A **program** is a planned, professional event, series, educational opportunity, or an activity (or set of activities) with a specific goal or outcome that is designed for the benefit of **your members**.

Examples include:

- Leadership development webinar
- Service project
- Plenary or panel discussion on a nursing topic

A **service** is a valuable action, deed, or effort performed to satisfy a need or to fulfill a demand. For your developing honor society, this might include:

- Writing a letter of recommendation or recognizing members in front of their employers and peers
- Offering scholarships or grants
- Volunteering
- Mentoring opportunities

The **benefits** are what your members gain by belonging to your developing honor society.

*This guide walks you through the steps needed to ensure you have the appropriate programs, services, and benefits for your members so that you can create and maintain lasting relationships with them.*

# Implementing an Annual Member Satisfaction Survey

*Understanding your members and their needs is a large part of the planning process.*

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“The key to retaining your members — and attracting new ones — is knowing what they need and value, how you can fill those needs, and what they think of your organization. Once you have some data to paint a good picture, you can begin adapting your strategies so that you’re relevant and providing better value. That’s ultimately the deciding factor in whether your members stay or go.”

–123Signup, a Member Solutions Company

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## STEP 1: USE AN ONLINE SURVEY PLATFORM.

Use a program built specifically for survey delivery to achieve the best results. These programs allow you to input questions, send the questions via email, and measure the results so that you can further your developing honor society goals. Many programs are free (or allow free use up to a certain number of surveys) and offer tutorials for use. Examples include:

- **Google Forms** – [www.google.com/forms/about](http://www.google.com/forms/about)

Google Forms is a free online survey tool that provides skip logic (i.e., If someone selects “yes,” the survey taker sees this secondary question), which makes it a nice option for groups with limited budgets.

It also allows you to set up an unlimited number of questions for an unlimited number of respondents. Survey answers and data are automatically collected in Google Spreadsheets for easy analyzing. Many themes are available, and custom logos and images can be added.

- **Typeform** – [www.typeform.com](http://www.typeform.com)

The free version allows you to set up an unlimited number of questions for an unlimited number of respondents; it also provides data exporting, custom branding, and basic reporting.

There is not skip logic in the free version. You can pay US \$25 a month for the pro version to get that capability.

- **Survey Monkey** – [www.surveymonkey.com](http://www.surveymonkey.com)

The free version allows you to provide up to 10 simple questions, which you can send to 100 respondents. This option might work out well if you are a smaller developing honor society.

Paid plans provide additional features. The annual plan, which is approximately US \$25 a month, offers an unlimited number of questions, and for an unlimited number of respondents. It also allows for skip logic and custom logos.

A tool may be available through your school of nursing or health system. Your developing honor society board should select the tool that works best for your developing honor society’s needs and discuss any applicable costs before moving forward. Additionally, it is important to familiarize yourself with provider terms of use before committing to a platform.

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“The secret to increasing retention rates for first-year members is simple: create at least one meaningful interaction during the first 90 days of their membership. It is during this time frame that most decisions are made regarding the perceived value of the membership and the decision to renew.”

–Sheri Jacobs in “The Art of Membership: How to Attract, Retain, and Cement Member Loyalty”

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## STEP 2: DEVELOP APPROPRIATE QUESTIONS.

Build questions that will be useful to plan your developing honor society’s programs, services, and benefits. Consider creating a second version of the survey specifically for your first-year members, who renew at a lower rate and tend to have a unique set of challenges.

Sample questions for your survey could include:

- Which developing honor society event(s) would you be interested in attending?
- What are the top three professional challenges you are facing right now?
- How would you prefer that the developing honor society celebrate your career achievements with your peers and employer?
- How likely are you to renew your membership? Why?
- Which volunteer opportunities would you be interested in?
- If the Chapter Charter Application is approved, how likely are you to join the new Sigma chapter at the Chapter Chartering Ceremony?



Sample survey questions for both membership segments can be downloaded from the Additional Resources webpage.

## STEP 3: DELIVER THE SURVEY!

Develop a plan to inform your members of where, how, and why the survey should be completed and when responses must be submitted. Be sure to include a strong call to action, such as “How can we improve your membership experience?” Additional communication tips are shared later in this guide.

To deliver your survey, use the membership roster being maintained by the developing honor society. This report allows you to see how many members have email addresses on file so you can deliver the survey electronically. If members do not have email addresses on file, call them to ask for this information, or send postcards in the mail to let them know that you would like to connect with them.

In addition to delivering the survey to members via email, post the link on the developing honor society website and social networking site(s); make sure it is clear that the survey is for members only.

If possible, include an incentive for members who complete the survey, such as:

- A chance to have membership dues paid for the next year
- Drawings for gift cards to local restaurants
- A Visa gift card

Survey members annually to account for the feelings of new members and those who might have changed career paths and to allow new board members to learn more about the current membership. You can also conduct post-event surveys to get feedback on specific programs that you host throughout the year. Find additional tips and information on page 14.

*Did you know? Less than half of your first-year members will renew into a second year. Ask questions to determine the information your developing honor society needs to create programs, services, and benefits that might entice them to renew!*

## ALTERNATIVE TYPES OF FEEDBACK

In addition to sending annual membership surveys, you might need to periodically **convene member focus groups**. These groups allow you to ask more in-depth questions of membership segments to have a complete set of data before you act.

Consider hosting one focus group with varying member demographics or convening smaller focus groups to allow you to concentrate on specific demographics, such as first-year members or clinicians.

Additionally, consider creating a “Feedback” button on your website. Nonmember site visitors — including those who did not accept their invitations or came to the site looking for more information about joining your developing honor society — may also have some useful feedback!

## YOU HAVE MEMBER FEEDBACK . . . NOW WHAT?

Analyze the responses. What trends do you notice in the results? This data will provide a valuable frame of reference when you develop and update your developing honor society’s strategic plan, as discussed on page 26.

One of the main goals of implementing a member survey is to develop events and programs that meet the needs of your members. Evaluate the feedback you receive from these questions to plan events for the next year.

## ENGAGEMENT THROUGH EVENTS

First, determine the types of events you would like to conduct, based on the responses from your survey:

- Educational or research events
- Community service events
- Professional or leadership development events
- Networking or social events
- Family-friendly events
- Developing honor society fundraising events
- Member award or recognition events

If feedback is varied, you may need to provide multiple events to deliver something of value to each of your membership segments.

***Looking for help with program topics? You can access select free articles from the Journal of Nursing Scholarship or Worldviews on Evidence-Based Nursing in the Free Resources for Nurses area of the Sigma website. Or, browse the Virginia Henderson Global Nursing e-Repository, [www.nursingrepository.org](http://www.nursingrepository.org), which is free to everyone.***

## GET CREATIVE!

- Consider having a “Happy Hour” on the anniversary of the first developing honor society planning meeting. Ask each member what has made them happy in their career or membership over the last year, and spend time recognizing those achievements.
- Beta Chi Chapter (Northwestern State University, Louisiana, USA) hosted “Painting With a Nursing Twist,” during which members painted works of art to be donated to a local nursing home.
- Georgian Court University’s developing honor society (Lakewood, New Jersey, USA) ran a Dolls for Dementia drive to collect brand new dolls to disperse to patients diagnosed with dementia and Alzheimer disease.
- St. Luke’s College’s developing honor society (Kansas City, Missouri, USA) had a VIP Study Room Fundraiser. They offered a quiet and relaxing space during exam week, and included refreshments and a raffle ticket. It was open to all nursing students for a US \$5.00 donation, and honor society members received an additional raffle ticket.
- Beta Chi Chapter also organized a “Wine and Wigs for Water” fundraiser in honor of its 40th anniversary. Members could win prizes for wearing wigs to the event, which doubled as a fundraiser for water.org.
- Delta Xi Chapter (Kent State University, Ohio, USA) conducted a “Fall Family Fest” where members and their families enjoyed hay rides, a riding track, and a pumpkin cannon launch.
- Phi Gamma Chapter, Sigma’s virtual chapter, hosts a virtual poster presentation so that its members – who are located around the world – can participate in an event that is convenient and accessible for them.

In addition to providing topics that interest your members, keep these other important considerations in mind for your developing honor society events:

**Location** – Where will your event be held? Is it online or in-person? What is the cost? If you have asked your members for location considerations, be sure to research those options to determine whether they are a good fit.

**Day of the week and time** – Are you able to provide events at varying days and times to ensure they meet the schedules of your members?

**What’s in a name?** – Do not call it a “Membership Engagement Event.” Give it a title that is clear in the intent and the outcomes for members who attend. Examples include:

- Six Steps for Successful Research Surveys
- Recognizing and Responding to Human Trafficking
- 10 Tips to Make the Most of Your Membership



Find additional tips on creating attractive titles by viewing the “Engagement Through Events: 50 Tips in 50 Minutes” recorded webinar on the Additional Resources webpage.

**Advance communication** – Members may need a heads-up to take time off work or to find babysitters, so be sure to give plenty of notice for your events!

**Find partners** – Partner with Sigma chapters or other developing honor societies in your region to expand your reach and your budget. You might also consider pairing with other nursing organizations or local health systems to present content for your clinically based members.

*You can include a practice setting in your developing honor society to start an at-large chapter! Visit [www.SigmaNursing.org/Chapters](http://www.SigmaNursing.org/Chapters), and click on “Start a Chapter” to learn more.*



**Always be on the lookout for sponsors** – Individuals or companies may be willing to provide monetary donations, food and beverage discounts, gift cards or door prizes, free nights at a local hotel, or other perks to your developing honor society.

Provide sponsor incentives, such as listing them as sponsors in all member newsletters, press releases to the community, etc.

**Fundraising** – A developing honor society board may determine that it would like to solicit donations from members for a variety of causes. Before a developing honor society considers soliciting members for donations, remember the developing honor society status.

- The developing honor society is not affiliated with Sigma, and therefore does not have the same 501(c)3 status under the United States Internal Revenue Service (US only) as Sigma chapters have.
- Sigma chapters are independent, autonomous organizations affiliated with Sigma. Each US chapter is a nonprofit organization and does not contemplate the distribution of gains, profits, or dividends to the members.

*Developing honor societies must follow appropriate laws at the federal, state, province, and local levels. Refer to the “Fundraising Basics” document on the Additional Resources webpage.*

**Consider offering continuing nursing education (CNE) credits** – CNE can be a great incentive for members to attend an event.

Not sure where to start? Watch the “How to Offer Continuing Nursing Education Credits” recorded webcast on the Additional Resources webpage. *(Keep in mind, this webcast was directed toward Sigma chapters, and some points may not be valid for developing honor societies and their members.)*

**Add an evaluation** – Measure the success of your event by sending a post-event survey within one to two weeks after the conclusion of the event.



Download sample post-event survey questions from the Additional Resources webpage.

To stay on track before, during, and after your event, prepare an event-specific checklist.



Download a sample from the Additional Resources webpage.

The success of your event depends on the volunteers who help plan and execute it. Continue reading to find out how you can recruit the best volunteers!

# Importance of Engaging Volunteers and Creating Volunteer Opportunities

Your survey should also ask members how they would be willing to volunteer their time. Use those responses to set up volunteer opportunities for your members.

Volunteer commitments allow your members to work together to add to the success of your developing honor society and community, all while making new friends and connections.

Members' volunteer efforts tend to evolve from small to large. To help them progress, provide volunteer opportunities that vary in scope and time commitment.

## ONE-TIME COMMITMENTS

Some members indicate that their involvement is limited due to time constraints. Others may be intimidated to commit to long-term volunteer positions, because they are new to the developing honor society. Develop one-time commitments that allow members to get to know each other and the developing honor society in a short amount of time, such as:

- Handing out name tags at a developing honor society event
- Creating a hashtag for the next big developing honor society event
- Designing a flier



Download a list of sample one-time volunteer commitments from the Additional Resources webpage.

## MID-RANGE COMMITMENTS

The developing honor society bylaws allow your developing honor society to establish committees and task forces for specific events and initiatives, providing members with an opportunity to meet new people and participate without the full commitment of a developing honor society leader position. Ask members who have served in a related one-time commitment to serve in this capacity for a few months and even up to one year:

- **Publicity Committee** – Works to create a buzz around your developing honor society and the membership experience through social media, your developing honor society's website, etc.
- **Membership Involvement Committee** – Works to create the ideal membership experience.
- **Induction Planning Task Force** – Helps implement the next induction ceremony.

## LONG-TERM COMMITMENTS

The next step is to serve as a developing honor society leader. In addition to the board positions that are required per the bylaws, the developing honor society can appoint other people to conduct the business of the developing honor society and to help the board complete the tasks required in their roles. This type of role includes such positions as:

- **Membership Ambassador** – Serves as a liaison between newly inducted members and the developing honor society. Can be very important in influencing your first-year members' renewal rates.
- **Newsletter Editor** – Helps publicize developing honor society events and programs and conveys news to members through developing honor society newsletters.
- **Webmaster** – Regularly updates the developing honor society's website and social media accounts.

# Orienting Volunteers to Their Position

Once you have determined the open volunteer opportunities that you would like members to apply for, you need to ensure they have a chance to be properly trained or oriented for their roles. If your volunteers do not feel prepared, they may get frustrated or confused during their time in their roles and will be less likely to volunteer again in the future.

For smaller commitments, this preparation might require the volunteers to arrive one hour early. Larger commitments will require more time from the volunteers and from the person(s) who is orienting them to their roles.

Ensure that your orientation opportunities are properly documented and communicated to volunteers well in advance.

# Adding Opportunities to Your Developing Honor Society Website

Your developing honor society may choose to create an online platform, such as a website, webpage, or social media account(s). Refer to the Honor Society Leader Quick-Start Guide to Website Management included in the *SPARK: A Developing Honor Society's Guide to Successful Recruitment* resources on the Additional Resources page for more information on how to start your website, webpage, or social media accounts.

Once you have established an online platform, use it to communicate and publicize volunteer opportunities that members can apply for.

When posting a volunteer position opportunity, be sure to include the following:

- Volunteer title
- Description
- Amount of time required
- Qualifications or experience required
- Date and time (if applicable)
- Number of volunteers needed
- Who to communicate with if they are interested, or how to apply

Next, ensure that you effectively communicate your open positions to your membership. If you have personal connections, start with those individuals by encouraging them to get involved. People are more likely to participate if they receive personal invitations. Additional communication tips are available in the next section.



# Recognizing Volunteers



Customize a volunteer recognition certificate to thank developing honor society volunteers. There are many templates available online.

After your volunteer opportunities have concluded, it is important to take time to recognize the volunteers who have given their time. You can accomplish this in several ways:

**Publicly thank volunteers at the close of an event.** After your event has concluded, recognize the volunteers who helped make that event a success.

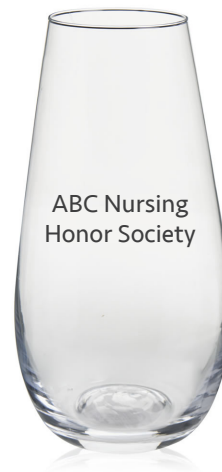
**Send thank-you messages.** Send messages after the event to volunteers. Consider sending personalized messages.

**Host a celebration.** Have a special event to thank members who have volunteered their time over the past year.

**Provide volunteer gifts.** Consider providing a small token of appreciation to each volunteer. This might be a gift bag or gift card for smaller time commitments, or something larger for a developing honor society leader commitment.

You can even order gifts that are etched with your developing honor society name from many websites or a local trophy or gift company.

Example:



**Celebrate Volunteer Week.** Sigma celebrates Volunteer Week every April, and it is a perfect time to recognize your developing honor society's volunteers. Consider submitting a press release to local newspapers, posting the name of your volunteers on your website and social media sites, and handing out volunteer recognition certificates.

# Communication Is KEY!

Members want to remain connected with your developing honor society's opportunities for involvement and initiatives, even if they are not always able to participate. To create these connections and keep your members happy, your developing honor society needs to communicate with members often!

The developing honor society secretary is tasked with general communication responsibilities, but all developing honor society leaders should strive to connect with members through one-on-one opportunities and mass communication methods.

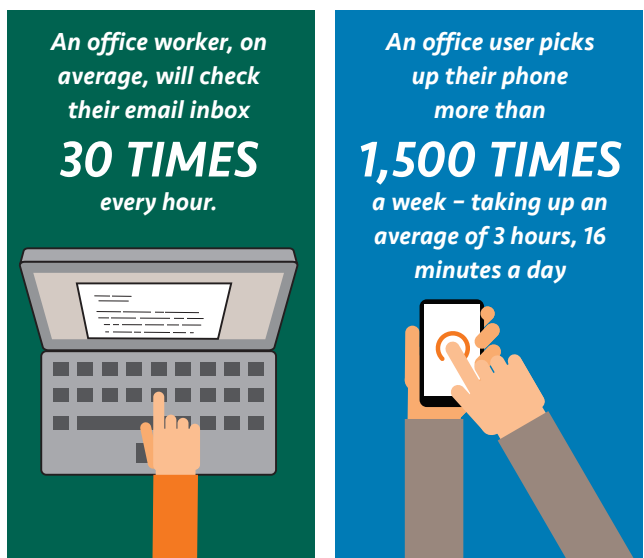
## Shortening Attention Span

One of the greatest battles you face when communicating with members is the shortening human attention span.

According to [hubspot.com](http://hubspot.com), our attention span has markedly decreased in 15 years. In 2000, the average attention span was about 12 seconds. Now, we are down to almost eight seconds. And guess what the average attention span of a goldfish is? NINE seconds.



On top of that, we are easily distracted.



# You CAN Conquer These Obstacles

The first step is to be clear about what you are asking from members. Messages should have **one clear call to action**. If you ask members to do too much, they may get overwhelmed before they even act.

Does your developing honor society have a strong call to action? Many times, we are writing about what we want people to do without telling them WHY they should do it or what is in it for them. So, think of calls to action that are unselfish and make the reader the focus of the action. Instead of saying "Register for our program," try saying something like "You can make a difference in stopping human trafficking!" The reader will understand immediately what the program is about.

## Mix and Match Communication Methods

Your members are distracted and constantly bombarded with messages. To get their attention, you must use multiple methods to ensure you are reaching them:

- Electronic
  - Email
  - Developing honor society website
  - Social media
  - Press releases
- Printed pieces
  - Mail
  - Fliers and brochures
  - Posters
- Word of mouth
  - Telephone calls
  - In-person contact

To determine the number of methods your developing honor society should utilize, double-check your budget. You may not be able to mail a postcard to every member, but perhaps you could afford to mail one to members who live in the same postal code as your next event.

Also, think about your members' provided contact information. Do you have a personal, non-university provided email address to reach members after they graduate?



# Why Not Just Send Everything via Mass Email?

Your developing honor society should keep spam laws in mind when communicating by email. Spam is characterized as annoying, unwanted emails from organizations the recipient does not know. In the United States, for example, you can be fined up to US \$300 per email if you are convicted. Other countries have laws that are equally or even more aggressive. Therefore, consider these tips when choosing your communication methods.

First, only send email to people who “want” it. This means avoiding sending messages to nonmembers with whom you do not have established relationships. For developing honor societies in other countries that have strict spam laws, this requirement also includes getting expressed permission to communicate with candidates.

Next, use an email system that has a link allowing members to unsubscribe from receiving messages. Your personal account through Gmail or Outlook does not include that, because it was designed to communicate with a few people at once. Investigate such services as:

- **Mail Chimp** – <https://mailchimp.com>

The free version of this service allows you to send messages to 2,000 or fewer subscribers, and up to 12,000 emails per month. In other words, if you have 2,000 members, you could send six email messages per month.

- **Constant Contact** – [www.constantcontact.com](http://www.constantcontact.com)

The pricing for this service is based on your list size. Discounts are available for nonprofits and those who prepay.

It is also recommended that you do not buy lists from other organizations or sell your members’ information.

*Did you know that most Sigma member benefits are delivered electronically? While developing honor society members will not receive Sigma benefits until the Chapter Charter Application is approved and they accept membership in the new chapter, it is important to have a communication plan in place early to ensure delivery of future Sigma chapter benefits.*


# Thinking Ahead to Chapterhood: A Preview of Sigma Resources

Sigma provides many free resources to help chapters communicate with their members frequently and easily. Upon Chapter Charter Application approval and chartering, the new chapter leaders will receive training on how to access and utilize these resources.

## **SIGMA UPDATE CHAPTER NEWS EDITOR**

Each month, active members receive *Sigma Update*, the e-newsletter designed to connect members with their Sigma benefits, organizational initiatives, and announcements. At the top of each issue, a space is designated for news from members' specific chapters. Your chapter should take advantage of this space EVERY MONTH to ensure you are connecting with members as frequently as possible.

Chapter leaders in communication roles — secretary, newsletter editor, publicity chair, and webmaster — receive monthly communication reminder messages that include the *Sigma Update* newsletter deadline. Each deadline is also listed in the All Chapter Officers Workgroup calendar.



**Sigma** UPDATE

Together, we change lives and advance healthcare.

Don't let this be your last *Sigma Update*! [Renew today](#) to continue receiving [networking opportunities](#), [career assistance](#), the [latest research](#), and access to more than [52 free online continuing nursing education courses](#) worth more than US \$950!

- **Get connected with your chapter website in the new year!**

Have you checked out your chapter's website located on The Circle? Start your Sigma membership off on the right foot in 2018 by connecting with your local chapter and fellow members virtually! Visit [thecircle.nursingsociety.org](http://thecircle.nursingsociety.org) and click on the 'Groups' tab from the main navigation bar. Click on 'My Groups,' where you can easily navigate to your chapter site.

Once there, you can find information about contacting chapter leaders, open volunteer opportunities, and any upcoming chapter events or programs. While you're there, be sure to introduce yourself and join the conversations in the discussion forum.

*Pro tip: Skip the steps and navigate directly to your chapter site! Just type in yourchaptername.nursingsociety.org (e.g., alpha.nursingsociety.org), to instantly access the website.*

Please follow up with your chapter if you have any questions.

## YOUR CHAPTER WEBSITE IN THE CIRCLE

Every chapter has a website from Sigma that is hosted by The Circle, the professional networking site for active Sigma members. Before getting started on the new chapter's website, leaders should update their personal Circle profile to include a photograph and information about the chapter leader role. Members want to know who you are and why you want to connect with them, so the first place they will look is your profile.

To see a chapter's website, utilize the chapter-specific hyperlink:

<http://chaptername.sigmanursing.org>

*Notice that there is no "www," and the words "chapter" and "at-large" are not utilized. For example, Rho Chi-at-Large Chapter's link is <http://rhochi.sigmanursing.org>.*

As mentioned earlier, one of the greatest benefits of your website is the discussion forum. All active members are subscribed to this forum, so postings generate an email to their primary email addresses on file with Sigma. The default subscription is a Daily Digest, meaning that one email is generated at the end of the day that summarizes conversations for that day. In addition to using the forum to post information pertinent to members, such as event announcements or links to membership surveys, you can also post questions meant to generate conversation and encourage members to interact online. These questions could include:

- Why did you become a nurse?
- What events would you like to see the chapter participate in next year?
- Do you have ideas for community service projects?

After a conversation is started, chapter leaders should participate in it so that members can see multiple people interacting on the platform, letting them know this is a location where they can interact with the entire chapter.

Your chapter can also use your website to send an email to your active members. This option is useful when you have information that you want to get in front of members quickly, yet no conversation will be taking place around that topic.



The new chapter leaders will be trained on utilizing and editing the chapter website after chartering.

## CONNECTIONS NEWSLETTER

In addition to the information your chapter provides, ensure that members know what is happening within the overall organization. This quarterly newsletter, delivered through *Leader Lines* and posted in the All Chapter Officers Workgroup, provides blurbs you can copy and paste in your member communications. The newsletter includes information on:

- International-level benefits, such as free items or discounts on publications and continuing nursing education
- Upcoming member webcasts that focus on member benefits and platforms, such as The Circle
- Organizational updates and news as well as upcoming events and deadlines

## MEMBERSHIP ROSTERS FOR MAIL AND EMAIL MERGING

After chartering, your chapter will have access to membership rosters, complete with contact information for additional communications, such as mail and email merges or mass emails through your chapter's email account.

There are wide variety of reports to take advantage of, including:

- **Active Only** – Contains all active (dues-paying) members of your chapter.
- **All Activity; Last 90 Days** – Tells you who has renewed, lapsed, or transferred into your chapter. This report is great to pull every 90 days so that you can send personal “thank you” messages to those who renewed, “we will miss you” messages to those who lapsed, and “welcome to our chapter” messages to those who transferred.
- **Inactive Only** – Consider setting a goal of communicating with inactive members a few times each year to keep them connected in case they wish to reactivate and join chapter activities.

The new chapter's leaders will be trained on how to access these reports after chartering.

## STYLE GUIDE AND TEMPLATES

There are many additional resources Sigma provides for chapters, including:

- **The Sigma Style Guide** to ensure you are using the correct Sigma branding and colors. As the branding styles evolve, Sigma chapter leaders are notified of changes that affect communications.
- **Samples and templates of communication items**, such as newsletters and a communication plan. Your communication plan helps you determine what you are communicating to active members, the frequency of your communications, and the methods that you use for each. It also assigns communication responsibility to the appropriate chapter leaders and volunteers.
- **Printable posters and membership collateral**, including Sigma posters, event posters that you can fill in with chapter-specific details, brochures, fliers, and more.



- **Training resources to help your chapter:**
  - Develop a strategic or communication plan
  - Create strong calls to action
  - Enhance your chapter’s website in The Circle
- **A request form to meet one-on-one with Sigma staff** regarding any chapter-related topic or training need.

# How Can You Achieve All of This?

*Remember:  
Sigma staff is  
available to help  
talk you through  
each of the  
strategic  
planning steps!*

To ensure your developing honor society and future chapter achieves everything mentioned so far, you need to create or update an annual strategic plan.

## THE BASICS OF STRATEGIC PLANNING

Strategic planning is the process that determines where a developing honor society or chapter is going over a specified period of time and how it is going to get there. The strategic plan is the combination of the goal setting and action plan the developing honor society created during development.



The basics are covered in this guide, but you also completed this during the Goal Setting and Budgeting, and Re-evaluating Goals and Budgets (Strategic Planning) modules of chapter development.

To get started, set up a strategic planning meeting with your developing honor society's leadership to create or update your developing honor society's plan. Then bring the plan to each subsequent meeting to track progress and ensure the established timelines are met.

## IDENTIFY GOALS AND ACTION ITEMS

Read through the areas of this guide as well as the *Developing Honor Society's Guide to Successful Recruitment* to determine the goals you want to set in each of the following areas:

- Recruitment
- Induction
- Orientation
- Surveys
- Programs, services, benefits
- Communications
- Volunteer and leadership succession

As you identify goals you want to achieve, ask yourself:

- Is this within our budgetary capability?
- How does this opportunity align with Sigma's mission, vision, and values?
- Which group of members/potential members does this goal serve?
- How can the developing honor society grow from this opportunity?

You will also assign action items to your goals, determine who in the developing honor society is responsible to complete each task, make budgetary considerations, and identify the timeline to complete your plan.

It may take several meetings to finalize your action plan, so work at a pace that is comfortable for your developing honor society's leaders.

## SAMPLE ACTION PLAN

| Strategic Area               | Goal  | Action Items   | Who Is Responsible?  | Budget   | Timeline                            |
|------------------------------|---|--|--|--|-------------------------------------|
| <b>Communications</b>        | Communicate with members at least once per month.   | Post a developing honor society newsletter every other month.          | Newsletter editor  | None   | By the 15th of even numbered months |
|                              |   | Post upcoming events every month on social media accounts and website. | Webmaster  | None   | First Monday of the month           |
|                              |   | Mail postcards for upcoming events, quarterly.                         | Secretary  | Mail to those within postal code; email to others.                         | Eight weeks before each event       |
| <b>Membership Engagement</b> | Complete an assessment of our current programs, services, and benefits by the end of the fiscal year. | Create and deliver membership survey.                                  | Vice president   | Funds for survey system  | 1 December                          |
|                              |   | Develop and send event evaluations.                                    | Program committee  | None   | 1 January                           |
|                              |   | Create focus group to receive additional member feedback.              | Board of directors   | Varies (May want to offer food or incentive to attend.)                    | 1 January                           |
|                              |   | Evaluate feedback  | Secretary  | None   | 1 March                             |
|                              |   | Utilize evaluation to improve programs, services, and benefits.        | Vice president, Program Planning and Membership Involvement committees | None   | 1 May                               |
|                              |   | Communicate changes and upcoming opportunities with membership.        | Newsletter editor, Secretary, Webmaster                                | Free electronic channels; Need funds for print and postage of mailed items | Ongoing                             |





## Phase 6: Renewal

If your developing honor society has created meaningful relationships with members in other phases of the Membership Life Cycle, you are ready to focus on the renewal phase.

Your developing honor society and potential future chapter depend on renewing members, not only to offer financial support but to help continue the Membership Life Cycle by introducing you to potential members. Additionally, renewing members will help the developing honor society meet the minimum active member count (50) needed to submit the Chapter Charter Application.

As a developing honor society, you are responsible for soliciting, collecting, and tracking member renewals. If approved to become a chapter, Sigma takes over soliciting, collecting, and tracking member renewals. However, the chapter can supplement these efforts to ensure that more members renew each year. This section explains what the developing honor society can do now to increase renewals, outside of sending a single renewal message.

# What Is the Developing Honor Society Renewal Process?

*Developing honor societies should begin the renewal process about three months prior to expiration. Members should receive multiple email and mailed notifications.*

*Additionally, members should receive reminders in member communications throughout the year.*

*Once a member has lapsed, they should receive a link to an exit survey to communicate what could have been done to keep their membership active.*

*A newsletter can be sent to inactive members throughout the year to highlight developing honor society initiatives and recent programs.*



Are your developing honor society leaders comfortable answering questions about renewal? Download “Frequently Asked Questions About Renewal” from the Additional Resources webpage.

# What Can Your Developing Honor Society Do?

In addition to the renewal message sent by the developing honor society, you also have the opportunity to send supplemental messages to increase the renewal effort.

## SEND SUPPLEMENTAL MESSAGES.

In addition to planning the ideal membership experience and getting your members involved with developing honor society activities, your developing honor society can also send supplemental renewal messages to members who are up for renewal or who have already lapsed. These messages reinforce the benefits of belonging to your specific developing honor society.

To get started:

1. Using your developing honor society's membership roster, sort the report based on expiration date to identify who will need to renew in the next month.
2. Look at who has joined, renewed, transferred, or lapsed in the last 90 days.
3. Download renewal message samples from the Additional Resources webpage:
  - There is a template for first-year members, half of whom will not renew for a second year, a much lower percentage than your other membership categories. Working to engage and communicate specifically with these new members increases your retention rate while also tapping into a pool of excited and eager volunteers and leaders.
  - Templates are also available for members whose renewal is approaching and members who have recently become inactive.
4. Edit the messages to include your developing honor society-specific information and why members should renew in YOUR developing honor society.
5. Send the email messages to your selected audience. If you receive any undeliverable alerts from your emails, mark your membership roster appropriately. Try to get updated contact information for these members.

You can also set an alert on your calendar to send messages throughout the year to ensure you reach as many members as possible!

## HOST A CALLING CAMPAIGN.

In addition to connecting with members who are about to let their membership lapse, you should also aim for members who are currently inactive.

One way to decrease these numbers for your developing honor society is to host a calling campaign. Phone calls are more personal than email messages and give members a chance to ask questions about your developing honor society before renewing.

**Do not be intimidated by the size of your inactive roster.** Segment the list to determine whom you want to reach first, and have a calling event for each specific audience:

- *Members who have been inactive for fewer than six months.* They may have forgotten to renew their membership, and your reminder could help spur them to renew and get involved.

The number of active versus inactive members is evaluated during the Chapter Charter Application review.

- *Members who have been inactive for more than six months.* If members have been inactive for a long time, they may not realize all the new initiatives the developing honor society has implemented. Take some time to tell them about what you have done in the last year and what you plan to do in the next year.

Another way to prevent your inactive roster from growing is to reach members *before* they become inactive. Host an additional calling campaign to reach members who are due to renew in the next 30 days. You still have a chance to influence their decision before they lose their benefits.

***Set a realistic goal of the number of members you would like to renew from your campaign: 20 renewing members would allow your developing honor society to gain more financial stability, make more local connections, and find a new pool of volunteers for developing honor society initiatives.***



Telephone scripts, email templates, and additional resources are available to make this campaign a success for your developing honor society.

Sigma staff is also able to help segment your inactive roster so that you can focus on specific segments whom you would like to target for each calling campaign.

## **SURVEY THOSE WHO DO NOT RENEW.**

Put together a simple survey that asks inactive members why they chose not to renew their membership and what the developing honor society could do to encourage their renewal.



Download sample questions from the Additional Resources webpage.

Use the survey platform you selected for your membership survey to deliver this survey each month to those who have not renewed. Based on the feedback you receive, you may need to add a goal to your strategic plan.

## NEXT STEPS



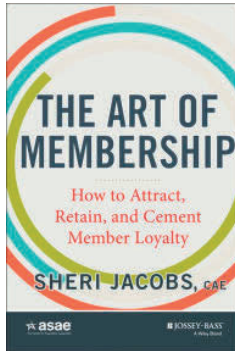
Continue moving through each step of the Membership Life Cycle to create the ideal membership experience from start to finish. Share your successes in additional comments section of the Renewal module and with Sigma staff.



*Thank you for serving as a dedicated developing honor society volunteer!*

*We appreciate your time and service.*

# RECOMMENDED READING



## “The Art of Membership: How to Attract, Retain, and Cement Member Loyalty”

by Sheri Jacobs, CAE

If a membership organization is to succeed in today’s competitive environment, it must attract, recruit, and retain engaged members who will help the organization thrive. *The Art of Membership*, written by Sheri Jacobs, CAE, is a hands-on guide that contains the information, strategies, and principles that any membership organization can access to find its value, understand the difference between members and customers, sell its unique benefits and overcome objection, personalize the process, and create meaningful relationships with its members.



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