



# NEW MEMBER ENGAGEMENT

ADVICE, TEMPLATES AND SCHEDULE

# NEW MEMBER ENGAGEMENT

We at JCI USA want to support our chapter leaders in engaging and retaining our members. Please utilize the following documents as a process to do exactly that. We've included detailed examples of ways to communicate, have touchpoints and engage our new members.

These steps include pieces that, when followed, will actually have our members already engaged and achieving their first three degrees of the Passport to Civic Leadership Certification program by the end of their first year. We also are advising the setup of an ambassador/mentor style relationship between senior members and new members. Within this document, you'll find an expectations document for those individuals who step up for this crucial role in the new member journey. The final portion of this document includes sample letters and emails you can send to new members to show you care and are here to support them.

Our mission is to provide development opportunities that empower young people to create positive change. With the focus and intentionality in place, your chapter will feel confident in recruiting, engaging and retaining a membership that is relevant and proud to represent your chapter within your community.

Please contact us at JCI USA with any additional questions or support in implementing these practices at [info@jciusa.org](mailto:info@jciusa.org).

Thank you and continue being empowered and making our world a better place.

# MONTH 1 WELCOME

Reach out to a new member soon after joining. Be proactive and responsive (*first impressions mean everything*). Keep your communications spread out, so you don't come across to invasive.

## CHECKLIST:

- Send a welcome email with login info to the member database.**

*Sample Emails included at the end of this document.*

- Follow up with a phone call.**

*Within a week of sending login info, contact your new members who have NOT accessed the member database. (You want to make sure they're not having login difficulties.)*

- Review Overarching opportunity.
  - Individual, Community, Business and International Areas of Opportunities.
- Ask member to share top three personal and professional goals
  - Provide feedback of how some opportunities in Jaycees can help them achieve these goals.
- Walk member through member database to review their profile and how to utilize it.

- Welcome your new members in your next newsletter or monthly email.**

*Keep a running list of all your new members (particularly as they fall between newsletters) and make SURE you don't forget anyone.*

- Use social media to welcome your new members.**

*A quick tweet or social post grabs the attention of your new members and gives them that "VIP" feeling. (Who doesn't love a shoutout?!)*

- Post a photo and short bio on Instagram and Facebook
- Have member make a 15 second video for TikTok sharing a unique/special talent or story introducing themselves.

- Set expectations of new member to attend membership meetings to acquaint themselves with the current activities and structure of the chapter.**

*Emphasize the importance of attending at least 50% of the membership meetings to get the best experience and access to the most opportunities.*

# MONTH 2 CONNECT

Start building that relationship with your new members and strengthening their sense of belonging. Make time to create personal (*and unique*) touch points for your new members.

## CHECKLIST:

**Handwrite & mail a personal note.**

*Among all the emails, texts, and letters with digital signatures, a simple handwritten note can really stand out. Not sure what to say? Utilize our sample note within this document.*

**Invite them to a membership social to introduce them as new members to the rest of the group outside of a meeting or event.**

*Market the event(s) on your website, social media channels, and via email. Your goal should be to introduce your new members to as many current members as possible.*

**Make sure new members are added to any online groups and email lists for the chapter. Be sure to include information for all existing initiatives and projects that they can have an opportunity to engage in.**

*Whether it's a Facebook Group, a WhatsApp Text Group, email list or the chapter has a Book Club, make sure and bring them into the fold on these opportunities and communications. The more you initiate conversation, the more they'll likely partake.*

**Introduce them to a member ambassador/mentor and schedule a one-on-one new member orientation.**

*If possible, match your newbies with current members who have similar interests and/or expertise. This kind of mentoring can help your new members get engaged at a quicker pace. Have ambassadors/mentors schedule one-on-one time to go over the JCI opportunity and how the new member can achieve personal and professional goals through our movement by getting more engaged. This is a time to set expectations and intention of their Jaycees career.*

**Make a special delivery.**

*Surprise your new members with a special delivery! If you hosted an event (for example, the member social), bring a framed photo or a special plaque. Other ideas: A branded mug filled with candy, or free tickets to an event with a welcome note from the president.*

**Invite member to attend a chapter event within the first three months of membership.**

*This is an opportunity for them to observe and meet more members.*

# MONTH 3 ENGAGE

To boost retention, it's crucial to engage your new members as soon as possible. Use month three to make sure your first two months' strategies were successful. By now, you should have welcomed, connected, and engaged with new members in a way that's meaningful to them.

## CHECKLIST:

**Post pictures from your celebratory events.**

*If you hosted any new member celebrations, post about them on social media! This is a great way to keep that excitement (and engagement) going.*

**Follow up with your member ambassadors/mentors.**

*Call or email your member ambassadors/mentors to see how things are going and if there's anything you can do to help them engage your new members.*

**Send a postcard/email of upcoming events specifically to new members.**

*Send your new members a postcard/email with a calendar listing of upcoming events. This will be a great resource for them to reference in the future.*

**Reach out.**

*Call your new members to discuss — one-on-one — how their membership is going so far. Mention upcoming events, referrals, and specific ways to get involved. (If they haven't attended a new member orientation yet, this is the perfect time to sign them up.)*

**Have members sign-up to get involved in a project committee and have them shadow an experienced committee member, co-chair or chair.**

*As you are getting to know the new member, clue in to their passions and direct them to a project they can get involved with and encourage them to join in to collaborate with a committee.*

**Make sure the new member is familiarized with reciting our mission and values with the Chapter President.**

*This includes the Jaycee Mission and Vision Statement and/or the Creed. The Chapter President should meet with each new members within the first six months of membership.*

# MONTH 6 DEVELOP

**After three months of engaging the new member, it's time to support them by focusing on developing and providing opportunities to help them reach their full potential.**

## **CHECKLIST:**

### **It's time to follow up again with a phone call or in-person meeting.**

*Now, our member understands the organization and opportunities.*

- Review the opportunities that our new member is wanting to focus on.
  - Individual, Community, Business and International Areas of Opportunities.
- Review their top three personal and professional goals
  - Ask them how their actions are going to move them closer to achieving their goals.
- Review their experience so far
  - This will help you better understand their specific needs and expectations as well as provide great feedback for the business of the chapter and ways the chapter can improve.

### **Project Interests**

- Have they identified any existing projects that will help them achieve goals? Guide them and support them in getting involved more in the project.
- Have them identify a NEW project or opportunity that they would like to bring to the table and share with the chapter. Have them reflect on ideas for this to review at the next follow up meeting.

### **Invitation to State/National/International Activities**

- Introduce new member to the opportunities outside of the chapter which can help in supporting their development. Let the new member know about upcoming events, digital trainings, projects and other opportunities for engagement at the state or national level.
- Prioritize the levels of the organization that will best support them in their needs as an individual.

### **Digital Access Beyond the Chapter**

- Encourage members to follow their state level and JCI USA level on social media (ie. Facebook, Instagram, TikTok)
- JCI Official Trainings: Join in or organize a digital training opportunity from state or national leadership. Examples include:
  - Communications
  - Leadership
  - Administration
  - Networking
  - Facilitation
  - Financial Management/Planning
  - Project Management

# MONTH 9 SHARE

Now it's time to get the new member communicating outwardly about their experience and beginning to share their excitement with other young people and community leaders.

## CHECKLIST:

### A new quarterly follow up via phone call or in-person meeting.

*We're really rolling here with the membership experience.*

- Review their top three personal and professional goals
  - Really deep dive into their actions and involvement in the organization and how these actions can impact their goals
- Celebrate and emphasize accomplishments to date. This is how you empower individuals.
- Ask if they have participated in any official JCI Trainings
- Discuss what opportunities they are discovering on social from state and national organizations.
- Review their experience so far
  - This will help you better understand their specific needs and expectations as well as provide great feedback for the business of the chapter and ways the chapter can improve.
- Project interest follow up
  - Discuss their engagement with existing projects.
  - Review their reflections on potential ideas/projects they want to create to support the chapter or the community.

### Active Citizen Framework

- Have an experienced member review the Active Citizen Framework process with the new member. This framework helps members understand how to identify the root cause of issues in communities. This will advance their problem solving skills in being a more successful member of the community.

### Community Engagement

- Work with Ambassador/Mentor and chapter leadership to organize a meeting with a local community official/leader that can help further develop the members goals and brainstorm potential projects to solve community issues.

### Invite a Friend/Colleague

- Have member think through friends/colleagues who might be ideal JCI members. Invite them to a chapter event or be intentional with scheduling a coffee/lunch opportunity with a chapter leader to chat about the chapter.

### Prospect List

- Have member compile and provide a list of 10 young individuals and community leaders (and their contacts) that may be exceptional future members of the chapter.

# MONTH 12 CELEBRATE

At the one year mark, your new member becomes a regular part of the chapter membership and framework. Recognize the new members accomplishments, their contributions and recognize them and their value they have added to the chapter.

## CHECKLIST:

### Recognition

- Present a certificate and celebrate their progress in obtaining their degree(s) in the Passport to Civic Leadership Program.
- Recognize the new member and their one year anniversary with their accomplishments on social media. Highlight how they are an added value and an asset to the organization.

### Ambassador/Mentor Recognition

Recognize the new member's ambassador/mentor with a personal thank you note (and potentially a small gift or gift card) and social media recognition for the work put in to develop our members. Remind and support them in adding this skillset to their resume for managing and overseeing people which is a skillset desirable by all companies.

### Resume Enhancement

Support member in reviewing and updating their resume based on the experiences and skillsets they have gained in the organization.

### Final quarterly follow up via phone call or in-person meeting.

- By following through with these touchpoints with members, this should retain your member for years to come.
- Review their top three personal and professional goals
    - What has happened over the last year and where are they in achieving their goals.
  - Celebrate and emphasize accomplishments to date. This is how you empower individuals.
  - Ask about all of the activities they have participated in.
  - Discuss what opportunities they are discovering on social from state and national organizations.
  - Review their experience so far
    - Were they able to get a friend/colleague to attend?
    - Were they able to meet with community leaders to discuss community challenges and potential solutions?
  - Project interest follow up
    - Ask if they have developed any projects with the project management guide for rolling out in the chapter.



# NEW MEMBER CHECKLIST

Member Name:

Start Date:

Utilize this one-sheet to track the touchpoints and give your new members the best experience possible. This is a checklist for chapter leadership to follow... not the new member. Have fun and enjoy your time getting to know these new individuals.

## CHECKLIST:

### Month 1:

- Welcome Email and database access
- Month ONE 1:1 Meeting Phone Call
- Shared in newsletter/email
- Social shoutout

### Month 2:

- Personal Note Sent
- Member Social Invite
- Add to online groups/email list
- Ambassador/Mentor Introduction
- Special Delivery
- Chapter Event Invite

### Month 3:

- Photos posted from events
- Follow up with Ambassador/Mentor
- Postcard/email of upcoming events
- Sign-up for Project Committee or shadow experienced leader
- Familiarize member with mission and values

### Month 6:

- Month SIX 1:1 Meeting
- Project Interests
- Invite to State/National/International Activities
- Digital Access Beyond Chapter

### Month 9:

- Month NINE 1:1 Meeting
- Active Citizen Framework
- Community Engagement
- Friend/Colleague Invite
- Prospect List

### Month 12:

- Month TWELVE 1:1 Meeting
- Recognition
- Resume Enhancement

# AMBASSADOR/MENTOR EXPECTATIONS

**Name:**

**Assigned New Member:**

**Start Date:**

## EXPECTATIONS:

### **Commit.**

*This is a crucial role in the new member experience. You need to be committed to acclimating the new member to the organization and the opportunities they can take to achieve their unique personal and professional goals. You are leading by example and so your lack of commitment can set the stage for new members to feel unwelcome and give less than they should in their own commitments to the organization. Follow through with tasks and actions agreed upon between you and your new member.*

### **Empower.**

*Our mission is to provide development opportunities that empower young people to create positive change. It is your job to help cultivate and foster a safe environment for members to try new skills, fail and learn from their mistakes. They need to be encouraged to step out of their comfort zone to try new things so they can learn and grow as people.*

### **Communicate.**

*Make sure you are actively communicating with your new member. Be clear in which routes your new member best communicates through (ie. text, phone, messenger, whatsapp, etc.). Be positive and encourage the member to share their life goals, so you can help guide them in the best course of action in the organization.*

*Be in touch with your chapter leaders to keep them in the know regarding the new member experience, especially if they are having trouble engaging.*

*If you are experiencing a personal life crisis or priority shift, please communicate with your chapter leadership so they can take up the responsibility of this relationship and continue on, so you can focus on what's important for the time being.*

### **Celebrate.**

*Always recognize accomplishments and remind new member of the great work they are doing to be engaged—large and small.*

# EMAIL BEST PRACTICES

Communicating with your new and existing members is pertinent for engagement and continued relevance. We recommend you communicate and have touch points with your membership consistently and often throughout the year.

## CHECKLIST:

- Be cautious of certain words and characters** such as \$\$\$, Free, !!!, and ALL CAPS. These can sometimes trigger SPAM filters.
- Use actionable calls-to-action** such as *Register for Morning Meetup* and *Download New eBook* in your subject line to increase open rates.
- Create a sense of urgency.** Subject lines such as *Registration Closes Tomorrow*, *Discount Expires Friday*, and *Limited Seats Available* all encourage a speedy response.
- Place calls-to-action in the top one third of your emails.** You want to get your point across first, then list out the details.
- Use a simple, clean layout.** That way, you can test your messaging knowing that the design isn't a factor in the email's performance.
- Be clear about what action you want them to take.** *Register Today* and *Download eBook* are much more obvious calls-to-action than *Submit Now* or *Click Here*.
- Make offers clear.** Be transparent about what they will receive — continuing education credits, networking opportunities, an eBook, or webinar access.
- Limit time of offer availability.** Doing so will encourage your members to act more quickly than if the offer was ongoing.
- Research your bounces.** If members aren't getting your emails, they likely aren't reaping the benefits of membership.

# MEMBER WELCOME

## NEW MEMBER WELCOME EMAIL TEMPLATE 1

Dear [First Name],

Welcome to [Chapter Name]! We're glad you've chosen to invest in yourself through your membership in the Junior Chamber International (JCI) movement, and we hope you take advantage of all the opportunities we offer our members.

The information that you provided on your membership application has been entered into our database so that we can better serve your needs. To activate many of your benefits, please login to the members-only section of our website [database login].

- **Username:** [New member's username]
- **Password:** [Link to reset password]

FROM THE MEMBER DATABASE, YOU CAN:

- Review your contact information for accuracy and keep up-to-date.
- Get engaged in Passport to Civic Leadership.

At any time, you may use [database login] to update your membership listing, view and pay any open invoices you may have, and update your preferences.

We value your membership with [Chapter Name] and look forward to providing you with access to development opportunities, professional networking and training opportunities, and ultimately, helping you grow as an individual both personally and professionally.

Sincerely,

[Name]

[Title]

# MEMBER WELCOME

## NEW MEMBER WELCOME EMAIL TEMPLATE 2

Dear [First Name],

Thank you for joining [Chapter Name]! We appreciate you choosing the Junior Chamber International movement with your membership investment.

### What is the [Chapter Name]?

- A membership organization of more than [membership size]
- The voice of young people creating positive change for themselves and our community of [community].
- Nearly [number] leaders serving you through [number] committees and [number] programs designed to foster your personal and professional development.

### What's in it for you?

- Platform to collaborate on sustainable impact projects to better your community.
- Business development and networking opportunities from local to global.
- Educational and training opportunities, and resources for personal and professional development.
- Representation and leadership opportunities at the local, state, national and international level.
- Corporate discounts.
- And more!

### How do I put my membership to work?

- Visit [jciusa.org](http://jciusa.org) to explore our opportunities in the areas of individual, business, community and international. Use your login to access the member database.
  - **Username:** [New member's username]
  - **Password:** [Link to reset password]
- Attend a new member orientation to understand your opportunities and plenty of tips for resources through your membership.
- Call, text or email us anytime! A board member can answer questions or visit with you in person.

We welcome you to the [Chapter Name] and look forward to seeing you grow and develop in the coming year. Thank you for your membership with the [Chapter Name]!

[Name]  
[Title]

# MEMBER WELCOME

## NEW MEMBER WELCOME EMAIL TEMPLATE 3: CHAIRMAN OF THE BOARD

Dear [First Name],

Welcome to [Chapter Name]! We applaud you for investing in your personal and professional success, all while making amazing impact in your community. As the leading global network of young active citizens, we will do all we can to support your personal and professional growth, as we develop leaders for a changing world.

Junior Chamber International (JCI) leadership continues to be aggressive and innovative in offering programs that impact every member. This year, we pledge to focus on four very important topics:

1. We will ...
2. We will ...
3. We will ...
4. We will ...

[Chapter Name] strives to achieve a vision of quality growth and opportunity, while serving as the voice of young people, offering personal and professional development opportunities for our members, and addressing community challenges in [LOCATION NAME area and the region]. In short, developing young people and strengthening communities are the reasons 8,000 young people invest in us with their membership.

Thank you for being one of them. We appreciate your involvement.

Sincerely,

[Name]

[YEAR Chairman of the Board]

# MEMBER WELCOME

SAMPLE  
HANDWRITTEN NOTE

Dear [First Name],

I wanted to take the time to personally welcome you to [Chapter Name]! I know that your membership investment is going to present you with numerous opportunities to sustainably change our community, and attend events geared toward education and training, professional development, and networking.

To get started, please join us for a new membership orientation on [date and time], where we will formally introduce you to all of your membership benefits, ways you can get involved, and upcoming events. We want you to feel at home with us, and I can't wait to see you there!

Kindest regards,

[Representative name]

[Contact information]

# MEMBER CHECKUP

90 DAYS BEFORE RENEWAL DATE  
EMAIL TEMPLATE

Dear [First Name],

First and foremost, we want to thank you for your continued service to humanity and investment in this opportunity for personal and professional growth with [Chapter Name]. Without your loyalty and support, we would not be able to continuously provide our members with valuable benefits and actively develop our [community]. Put simply, you make what we do possible.

Can you believe that it's been 9 months since you joined? Since that time, your membership has enabled us to accomplish so many initiatives:

- 1. We were able to ...**
- 2. We held our [event] ...**
- 3. We developed [initiative] ...**

We hope you've been able to personally benefit from your membership with [Chapter Name]. If not, let us fix that right away! Call [representative name] at [phone number], or email [him or her] at [email address] to see how we may better support connecting you to relevant opportunities.

If, like most of our members, you are satisfied with your membership, consider renewing now at [renewal URL]. Your early renewal will help us plan for next year's programming. Make sure to let us know if you have any suggestions. We'd love to hear your feedback!

Kind regards,

[Name]

[Title]



# MEMBER CHECKUP

45 DAYS BEFORE RENEWAL DATE  
LETTER TEMPLATE

Dear [First Name],

First and foremost, we want to thank you for your continued investment with [Organization]. Without your loyalty and support we wouldn't be able to continuously provide our members with valuable benefits and actively develop our [community or industry]. Put simply, you make what we do possible.

This is a friendly reminder that your membership is up for renewal. If you've already sent in your renewal, thank you! If not, remember, we offer several different payment options for your convenience. You can see available methods of payment at the end of this letter.

Every day our [chamber or association] works hard to enhance the [local community or industry] in which we serve, as well as work collaboratively with other local and/or industry-related organizations and legislative officials to address challenges and drive growth, represent and advocate for your best interests, and provide member value-added benefits to your organization.

Over the course of the past year, your membership has enabled us to accomplish so many initiatives.

1. We were able to ...
2. We held our [event] ...
3. We developed [initiative] ...

We've included a copy of our [year] Annual Report so that you can see what else we've been able to achieve this year. In addition to these undertakings, we've also had the opportunity to create value and promote growth specifically for your business/organization. We've enclosed a copy of your [year] Referral Report so that you can see firsthand how many times your business was referred during the year.

Looking ahead, we can't wait to accomplish even greater things for our members and our [community or industry]. In the coming year, we're excited to:

1. Launch a program to ...
2. Continue advocacy efforts ...
3. Enhance member value by ...
4. Collaborate with ...

Again, thank you for your loyalty to [Organization]. We look forward to continuing our relationship and partnering with you for years to come. For your convenience, on the following page we've included several different payment options. If you have any questions regarding your membership, benefits, or renewal, please give us a call at [phone number].

Regards,

[Name]  
[Title]



# MEMBER RENEWAL

15 DAYS BEFORE RENEWAL DATE  
EMAIL TEMPLATE

Dear [First Name],

Your [Local Chapter] membership expires [date], and we sincerely hope that you will join us for another outstanding year of great programs, personal and professional development and sustainable community impact.

Good news! There's still time to renew, and it's as easy as ever with these options:

1. Click on this link, [renewal URL], and follow the prompts.
2. You can attend our next membership [date(s)] meetings to accept your renewal payment.
3. Contact our Membership Director [Name] at by emailing [email].

More good news! This year we have an extra incentive for you to renew your membership by [date]. If your renewal form and payment are received by [date], you will be entered into a drawing for a [offering]!

[Local Chapter] values you and helps you meet your personal and professional goals in several ways, including...

- [Benefit highlight]
- [Benefit highlight]
- [Benefit highlight]

Please let us know if you have questions or concerns.

Sincerely,

[Name]

[Title]

# MEMBER FINAL RENEWAL

## RENEWAL DEADLINE DATE EMAIL TEMPLATE

Dear [First Name],

It's been a year since we first met you, and we're looking forward to many more years! Did you know that your [Local Chapter] membership expires today?

Please don't let your membership lapse! There are better options than paying an additional [dollar amount] to attend monthly events as a guest (guest rate is [dollar amount]) or rejoining at the new member rate of [dollar amount].

The good news is, there's still time to renew!

1. Click on this link, [renewal URL], and follow the prompts.
2. Call us at [phone number] and we'll renew your membership over the phone with a credit card.

Remember, [Local Chapter] values you and helps you meet your personal and professional goals in several ways, including:

- [Benefit highlight]
- [Benefit highlight]
- [Benefit highlight]

Please let us know if you have questions or concerns. We're here to support you!

Best regards,

[Name]

[Title]

# MEMBER POST DROP

90 DAYS PAST RENEWAL DATE  
EMAIL TEMPLATE

Dear [First Name],

First and foremost, we want to thank you for your membership with [Local Chapter]. According to our records, your membership dues are currently 90 days past due, and we don't want to lose you! We greatly value your involvement, so we're reaching out one final time to ensure continuation of your membership benefits.

[Local Chapter] values you and helps you meet your professional goals in several ways, including:

- [Benefit highlight]
- [Benefit highlight]
- [Benefit highlight]

In order to renew your membership, full payment in the amount of [dollar amount] must be received within 10 days from the date of this email. If your payment is not received by this date, we will assume that you wish to discontinue your membership.

Please contact [representative] at [phone number] if you have any questions or if there's anything we can do to help.

Best regards,

[Name]

[Title]

# MEMBER GOODBYE

## MEMBER DROP EMAIL TEMPLATE

Dear [First Name],

You will be missed!

We regret to inform you that your membership with [Local Chapter] has been cancelled.

We want you to be informed that as a result of your non-membership status, you will no longer have access to the many benefits of a [Local Chapter] membership, including:

- [Benefit example: Networking opportunities]
- [Benefit example: Education, training, and certification]
- [Benefit example: Discounts]

Please know that your participation with [Local Chapter] is always welcome, and that it's the investment from individuals like yourself that allow us to better serve our [community].

In the coming year, we are excited to take on many new initiatives, including:

1. Launch a program to...
2. Continue advocacy efforts by...
3. Enhance member value by...
4. Collaborate with...

We want you to be able to take advantage of these initiatives, as well as the many other benefits we aim to provide.

If you have any questions or want to discuss rejoining the [Local Chapter], please don't hesitate to give us a call. You can reach us at [phone number] or [email].

Best regards,

[Name]

[Title]