

THE COMPLETE

MEMBERSHIP **Handbook**

***A GUIDE TO MANAGING FRIENDS
MEMBERS AND SUPPORTERS SCHEMES***

LIZ HILL & BRIAN WHITEHEAD

DIRECTORY OF SOCIAL CHANGE

IN ASSOCIATION WITH

ArtsProfessional

**THE COMPLETE
MEMBERSHIP
handbook**

**A guide to managing friends,
members and supporters
schemes**

**Liz Hill
Brian Whitehead**

DIRECTORY OF SOCIAL CHANGE

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ABOUT THE AUTHORS

Liz Hill and Brian Whitehead are a husband and wife team who run a consultancy and publishing business, Arts Intelligence Limited.

Liz's primary role is as co-editor of the arts industry's leading fortnightly arts management magazine *ArtsProfessional*. She also manages research, consultancy and training projects for a wide range of clients. She has written and co-authored a number of books and articles for various publishers, including *Creative Arts Marketing*, *Foundation Marketing*, *Conducting a survey using SPSS* and *Commissioning Market Research*. Prior to the launch of *ArtsProfessional* magazine and its predecessor *ArtsBusiness*, she was a Senior Lecturer in marketing at Anglia Polytechnic University in Cambridge since 1991, where she designed and launched its MA in Arts Administration. She was also Senior Moderator for the Chartered Institute of Marketing.

Brian spent fifteen years in marketing roles within the arts and leisure sectors. His early career was in local authority leisure and arts management, for Three Rivers District Council and subsequently Northampton Borough Council. There he was Marketing Director for the Derngate Theatre which became a charitable trust in 1993. He left in December 1998 when his commitments to the consultancy and publishing activities of Arts Intelligence became full time. Brian has belonged to a number of voluntary, professional and non-profit organisations as a paid member, supporter and often as board member. His interest in friends and membership schemes has extended to both voluntary involvement and professional consultancy. He takes an active interest in all aspects of arts and cultural management, most notably through his co-editorship of *ArtsProfessional*.

ArtsProfessional and Arts Intelligence

ArtsProfessional is the UK's leading fortnightly arts management magazine, providing the arts and cultural industries with a vehicle for sharing good practice. Published by Arts Intelligence, it is written by industry practitioners and its readership ranges from board members and chief executives to academics, policy makers, funders, consultants, students and commercial suppliers to the arts and cultural sector. The publication is supported by a free fortnightly e-mail news digest, *APe-mail* and a fully searchable website at www.artsprofessional.co.uk. In addition to publishing *ArtsProfessional*, Arts Intelligence also supplies professional business and marketing services to the not-for-profit sector, as well as developing major projects with key

clients and serving the research needs of other consultants, agencies and freelancers. The company specialises in quantitative and qualitative market research and data management and analysis and offers consultancy services in relation to the setting up and management of membership schemes. For further information see the website at www.artsintelligence.co.uk.

ABOUT DSC

The Directory of Social Change (DSC) aims to help voluntary and community organisations become more effective. A charity ourselves, we are the leading provider of information and training for the voluntary sector.

We run more than 350 training courses each year as well as conferences, many of which run on an annual basis. We also publish an extensive range of guides, handbooks and CD-ROMs for the voluntary sector, covering subjects such as fundraising, management, communication, finance and law. Our trusts database is available on both a CD-ROM and a subscription website.

Charityfair, the annual three-day conference, events programme and exhibition, is organised by DSC and takes place each spring.

For details of all our activities, and to order publications and book courses, go to www.dsc.org.uk or call 08450 77 77 07.

PREFACE

Our decision to write *The Complete Membership Handbook* evolved over a number of years and has built upon a passion we share for the core values in our work relating to best practice in the arts and cultural sector. Our initial interest was triggered through our work relating to ‘friends’ of arts organisations and has developed into a deeper concern for understanding how groups of people organise themselves to promote a common interest – usually for the benefit of the common good. Some arts organisations worked closely with and gave considerable support to their friends groups and some were keen to establish a friends group for the first time. Others were struggling to work effectively with an existing group; or even, sadly, displayed only a grudging acceptance of their friends and either overtly or covertly sought to curtail or even terminate their activities.

When we looked beyond the cultural sector, we found many similarities in the way that membership schemes operated. Furthermore, we identified many successful organisational models, and lots of examples of good practice in management and marketing. It is our hope to share those models of good practice between sectors and promote the undeniable benefits that can be generated through a well-managed membership scheme.

Some elements of this book will be of interest to just about anyone tasked with setting up or managing almost any type of membership scheme; but the key themes are of particular interest to those who wish to bring together a group of people in support of a charitable or social cause or activity. The primary focus is on membership schemes that aim to support not-for-profit activity, for which the involvement of a core group of loyal supporters can bring major benefits.

The book will be of particular interest to:

- board members, trustees, directors and chairs of membership organisations, and organisations to which membership groups are affiliated – for solutions to strategic issues faced by their organisations, including long-term financial planning, objective setting and goal achievement, advocacy and public relations;
- chief executives and senior managers – for solutions to strategic issues, but also for advice on creating and implementing these solutions, monitoring and evaluating their achievements;
- managers of membership schemes – for advice on how best to run their day-to-day activities, and for guidance on operational matters such as

managing the finances, communicating with members, marketing and sales and general administration;

- managers of other functional areas such as finance or marketing – for an overview of how a membership scheme can fit alongside other marketing, sales and fundraising activities;
- volunteers involved with a membership scheme – for a better understanding of where their scheme fits into an affiliate organisation or other social cause (and for those involved in boards and committees, this book offers guidance on discharging those responsibilities);
- academics and students – those with an educational or research interest in the operation of membership schemes;
- government and policy-makers – to understand how this special area of the not-for-profit sector operates, and to recognise its potential in co-ordinating special interest groups and the delivery of revenue streams.

More than 100 examples illustrate the work of a diverse range of membership organisations, the problems they have faced and the solutions they have found to those problems. Hopefully, almost anyone involved with a membership organisation or scheme can find inspiration from their experiences, and by learning from these examples, can avoid the pitfalls that lie in wait for the unwary.

Liz Hill and Brian Whitehead

Spring 2004

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We would also like to take this opportunity to thank those individuals and organisations who have given us permission to use and adapt material for this book. Every effort has been made to trace the owners of copyright material, though in a few cases this has proved impossible and we apologise to any copyright holders whose rights may have been unwittingly infringed. We trust that in the event of any accidental infringement, the owners of the material will contact us directly. Please note also that where membership fees have been quoted in the book these figures were correct at the time of going to press.

If you have any suggestions, comments or corrections, please contact us through our website at www.completemembership.co.uk or by e-mail to info@completemembership.co.uk. Updates and other useful information on managing membership organisations will be posted on the website from time to time.

Dedication

To our children Christopher and Joanna, with love always.



WHAT DO WE MEAN BY A MEMBERSHIP SCHEME?

The concept of a ‘membership scheme’ may be one that is widely known, but it is also one that is seldom clearly defined. Such schemes are found to operate in a diverse range of organisations and contexts, with widely varying purposes. They exist under a range of different names and perform a diverse range of functions. This chapter aims to clarify the confusion that often surrounds the terminology relating to membership schemes, to explore the range of contexts in which they operate and to examine their most common structures.

A membership scheme is quite simply a mechanism for connecting like-minded individuals who are motivated to make links with others because they recognise that there are personal and/or societal benefits to be generated by their joining forces in a more formal way. It is a formal structure through which eligible individuals (usually, but not always, those who pay a membership fee) are permitted access to certain benefits which can only be obtained by joining the scheme.

The scope of membership schemes

Membership schemes can be found in just about all walks of life. For example, people who are interested in playing tennis will become members of a tennis club if they can see the benefits of gaining access to both courts and opponents; business people will join a Chamber of Commerce if they sense that there are good networking opportunities to be found, or that it will give them more influence over local government policies; and someone who cares for a disabled child may join a support group if they feel it will help them to cope better with the day-to-day realities of their situation and/or provide support for others.

Membership schemes are sometimes better known under other names. For example:

- **A friends scheme** (e.g., friends of a hospital or of a theatre): members tend to be individuals who are united in their affiliation to an organisation or project – usually referred to as the ‘host’, ‘patron’ or ‘parent’ organisation. Such schemes generally exist (and people join them) because they provide an opportunity for people to show their support for an organisation, whilst also benefiting themselves through giving that support.
- **A supporters group** (e.g., supporters of a particular football club or a fan club for a rock band): members of a supporters club join primarily to express their solidarity with others who support the same team. By forming a group, they can access special privileges from that organisation and meet with other fans.

Football Supporters’ Federation

The Football Supporters’ Federation (FSF) is an independent, democratic organisation with an elected national council that currently represents over 100,000 football fans throughout the UK. Members include both individual fans and local supporters organisations from every professional football club in England, as well as other leagues. The organisation campaigns by lobbying government and football authorities and supporting the views of fans on major issues. The FSF also supports England fans through the Fans’ Embassy, which provides information, confidential advice and support to those travelling to away games, and through JFFA – Justice for Football Fans Abroad. The organisation is also involved with other European fans’ groups through Football Supporters International. It has five regional divisions, each of which elects two members to the national council. The chairman, vice-chairman and other council members are elected at an annual conference.

Current campaigns include, Say No to Football Franchising, based on issues arising from the relocation of Wimbledon Football Club to Milton Keynes; The Campaign for Safe Standing; and support for the traditional 3pm Saturday start times for major games. The FSF produces a range of publications including a quarterly magazine and members also receive discounts on other football publications.

Source: www.fsf.org.uk (12 December 2003)

- **A sports or social club** (e.g., members of a film society or a hockey club): people are most likely to join these clubs to enable them to participate more fully in pastimes that they enjoy – and in particular those which require them to interact with others. For example, a hockey player won’t have much fun on the pitch on his/her own; and film buffs tend to need a group of people to join them in order to share the cost of hiring films from their distributors.

- **A pressure group** (e.g., a lobbying charity or a politically motivated group): groups of people working together are far more likely to be able to effect change within social, political, economic, legal, medical and other walks of life. For example a group of residents, threatened with environmental damage if proposed gravel and sand extraction pits are developed, may unite to influence local planners and national government to withhold the necessary planning consent.
- **An alumni scheme** (e.g., groups of former school pupils and ex-students of colleges and universities): generally such groups are organised and managed by the school or college concerned and are used as a vehicle for keeping former students in touch, raising funds for the institution and creating networking opportunities. With large colleges, or those with a celebrated history, alumni groups can extend across the world and spawn national and regional sub-groups as well as special interest groups.
- **A loyalty scheme** (e.g., a supermarket rewards scheme or travel club): people who join these schemes tend to do so in order to be eligible for financial rewards. They become eligible for certain discounts and incentives, and in return, the organisation running the scheme can gather valuable data about their purchasing habits. Whilst a loyalty scheme offers benefits to customers, the nature and extent of those benefits are largely discretionary, and in the gift of the scheme's operator. This is a key difference from most other membership schemes.
- **A trades union** (e.g., an association which represents employees within a particular industry sector or across a number of industry sectors). Trades unions exist purely to represent the interests of workers. They are mutual associations set up and owned by the workers, primarily to negotiate employment terms with company bosses. These days the services offered extend to mortgages, insurance, legal advice and much more besides.

Society of Authors

The Society of Authors is a trades union, founded in 1884 to 'protect the rights and further the interests of authors'. An independent non-profit making organisation, it exists to assist professional writers, illustrators, translators and broadcasters in their dealings with publishers, with contracts and with financial matters. Member benefits include a quarterly journal, Quick Guides dealing with common concerns, opportunities to meet other members, and discounts at bookshops and on a variety of other products and services. An Associate category of membership is available, for one year only, to unpublished authors. There are currently 7,631 full members of the Society, which is managed by nine full-time and four part-time staff. Membership increased by 12.4% in 2003, and 91.3% of members renewed their subscriptions in 2002.

Source: Emma Boniwell, Membership Secretary, Society of Authors, (December 2003)

- **A professional body** (e.g., doctors may belong to the British Medical Association, or music teachers to the Incorporated Society of Musicians): members of professional bodies may comprise people who have similar levels of professional standing or career interests. They may join primarily to access specific services or facilities relating to their specialist professional field of interest, or possibly to demonstrate official recognition of their professional expertise.
- **A co-operative** (e.g., a worker's co-operative or a retailing organisation such as the Co-operative Group, founded in 1840): as its name suggests, in law a co-operative is owned by all its members, each with voting rights. A co-operative is defined as an autonomous association of persons united voluntarily to meet their common economic, social and cultural needs and aspirations through a jointly owned and democratically controlled enterprise.¹ Such entities are often created for the social good, for working with disadvantaged people and self-help groups, for example.
- **A friendly society** (e.g., a mutual healthcare trust operated on behalf of employees of a particular sector such as the Benenden Healthcare Society Limited which assists post office and civil service workers and their families): a friendly society is a mutual organisation which provides a wide range of assurance, insurance and healthcare products, often tax free. They offer investment and protection to people of all backgrounds, and are owned and governed by the members.
- **An owners club** (e.g., a classic car club): those who join an owners' club have a common interest because they own, and are enthusiasts about, a particular product. It is their desire to share their enthusiasm with other like-minded people that drives them to become members, though their existence may not be of much significance to the organisation that produces the product.²
- **A product user group** (e.g., comprising a group of businesses who use the same software systems): non-competing business customers of organisations producing high value products and services may like to get together from time to time to discuss issues and problems that arise through the use of those products. Jointly, they are able to lobby and exert more pressure on the producing organisation to develop their products to meet their needs than they would individually. Such groups may be formally constituted or simple informal gatherings, and they may be inspired and managed by the users, the producing organisation or a mixture of both.

Clearly, membership schemes are in essence very diverse. Some are open for anyone to join (such as a supporters group), while others have strict membership criteria (such as a professional body). Some are affiliated to specific organisations (such as a friends scheme) while others focus on a

OTHER PUBLICATIONS FROM DSC

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Relationship Fundraising: Ken Burnett, Jossey Bass, 2002, £25.50

The law for the voluntary sector

The Voluntary Sector Legal Handbook: Sandy Adirondack and James Sinclair Taylor, DSC, £42 for voluntary organisations, £60 for others

Data Protection: Paul Ticher, DSC, 2002, £14.95

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