

NEW MEMBER ONBOARDING 101

They're Heeeere! Now What?

About Me

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Danielle Wiczorek

Component Services Manager

- ❑ 6 years association management experience
- ❑ Focus on member and volunteer experience
- ❑ CEC start April 2022
- ❑ Carmel, IN
- ❑ Primary focus area: Units
- ❑ Develop resources, trainings, templates, etc.
- ❑ UAP
- ❑ Why I love CEC

Pair & Share

What **special efforts** were made when **you joined a new club, association, or group** that made you **feel welcome, informed, or excited** about your new affiliation or commitment?

Why Do We Onboard?

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- ❑ High ROI
- ❑ Engaged members
- ❑ Contributes to a stronger sense of community
- ❑ Aids in acclimation to new association
- ❑ Creates exposure to people and programs
- ❑ Allows for a personal touch
- ❑ Immediate connection to organization/people

CEC's Onboarding Webinars

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- History of CEC
- CEC membership composition
- Mission & Vision
 - ▣ Strategic Plan
- Set Up Your Profile
 - ▣ Demographic Information
- Tools & Resources
 - ▣ CECommunity & connecting with others
- ▣ Special Interest Divisions
- ▣ Learning Library
- ▣ Journals
- ▣ Finding topic-based resources
- ▣ CEC Exceptional Teacher Resource Repository
- ▣ Store
- ▣ Policy & Advocacy
- Volunteer with CEC

CEC's Onboarding Webinars

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Our “top 5 ways” new members can “activate” their CEC membership!

Update Your Member Profile

Post to the CECCommunity

Visit the Online Learning Library

Build Your Professional Network

Add CEC to Your Safe Sender List

Where do you come in?

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- ❑ Find out who your new members are!
- ❑ Welcome them!
- ❑ Promote attendance
 - ▣ Upcoming webinars are promoted on our website
- ❑ Cross promote the “top 5”
- ❑ Connect members to impactful programs or resources they’ve learned about
- ❑ Create opportunities to build connections within your component



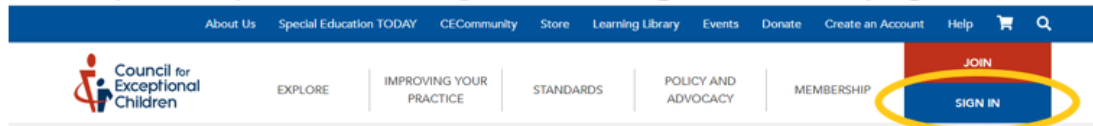
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Pulling Membership Reports

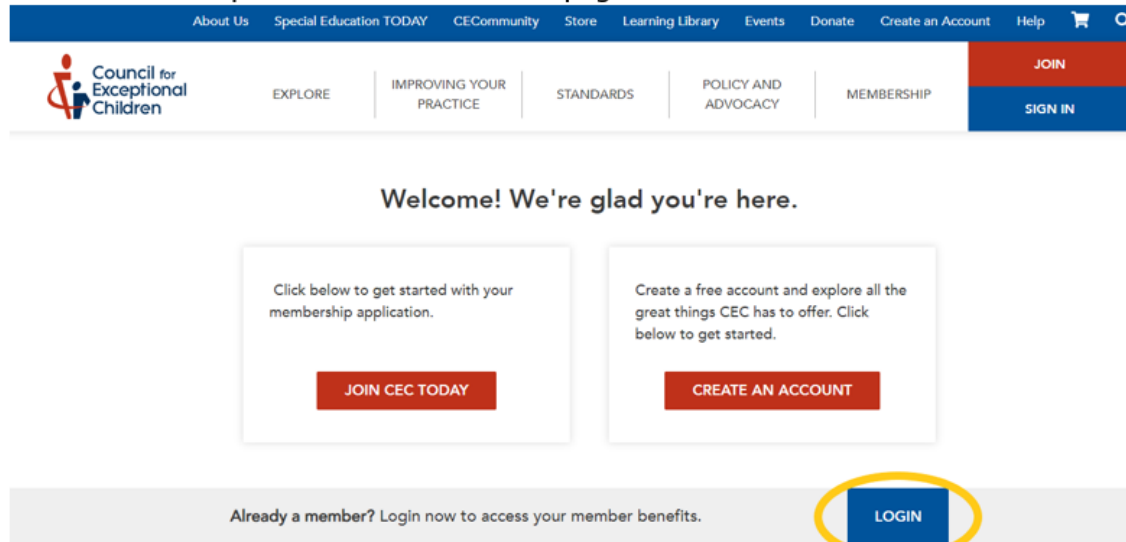
Pulling Membership Reports

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1. Navigate to CEC's website at <https://exceptionalchildren.org> and click **"Sign In"** in the top right corner of the home page.

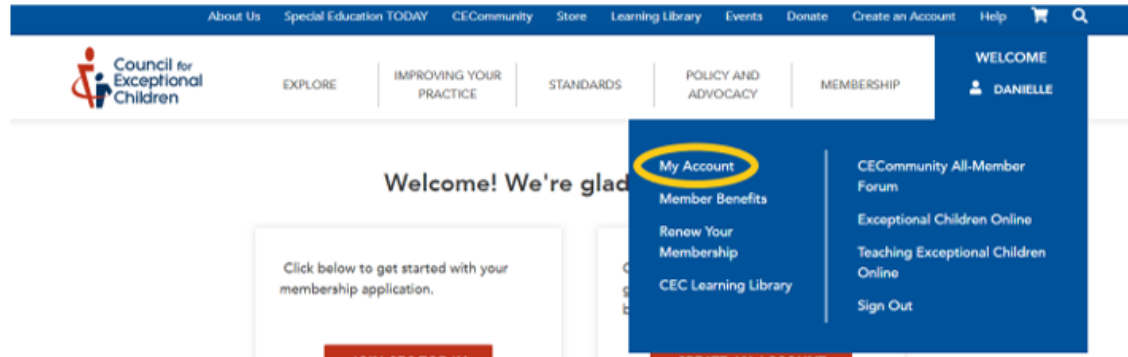


2. This will bring you to the sign-in page: <https://exceptionalchildren.org/account>. On this page, you will click the blue **"LOGIN"** button located just before the "CEC Membership Benefits" section of the page.

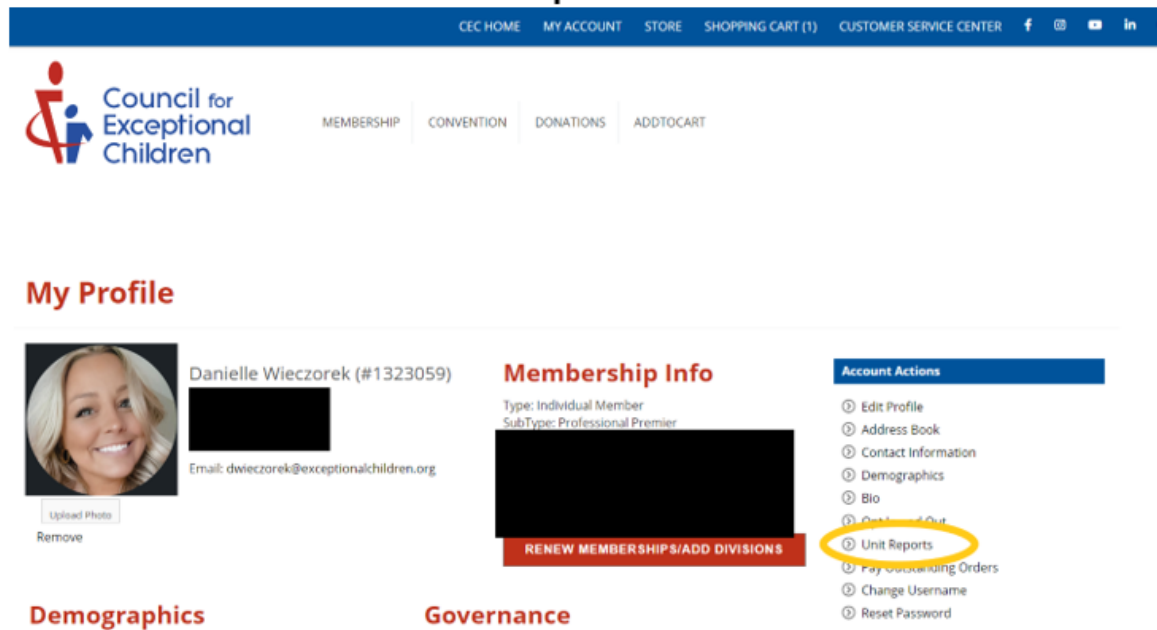


3. **Log in to your CEC account** using your own credentials.

4. Once logged in, the once red/blue buttons in the top corner will change to blue and read "WELCOME" and include your name. Next, **click** (or hover your mouse) over your name and select **"My Account."** This will take you to your profile page and will display your personal information.



5. On this landing page, under "Account Actions" **select "Unit Reports."**



6. On this new page, **select the report you want to run** (by clicking one of the grey circles and turning it red with a white checkmark) and complete the necessary information. Please note the following:
- The red asterisk means that data entry is required.
 - "Member Category" below displays "Company Members" as an option, but **CEC has no company members**, and the option cannot be removed from the list. Do not make a selection here.

	PRINT NOW Sends request & waits up to 30 seconds for a response	SUBMIT NOW Sends request without waiting. Retrieve later with 'View List'	VIEW LIST Toggle on/off to view the list of requests you have made
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Membership Lists

These reports provide lists of members in the various categories listed.

Only (current) Member list reports display the member category based on the current membership folder. All other reports use a contact's invoices - so differences might occur if a member folder does not match the corresponding financial record.

For all historical

Select Your Report:

- CEC Individuals that have Joined
- CEC Individuals that have Renewed
- CEC Individuals that have Expired
- CEC Individuals that have Returned
- CEC Units and Division Export
- CEC Individual Active Member List (w/Grace Period)

Enter Parameters For Selected Report:

Unit Category: *

Select Your Output:

- Export to Excel 2007 .xlsx

7. Once you have completed the information and made your selection, **click "Print Now."** This will download your report into an Excel file and will pop up in a separate, small window; you may need to expand the size of the new window to see your download. **If this window does not appear, you may have a pop-up blocker enabled that will need to be disabled for this site.**



If your export does not open automatically, then you can find the report in the VIEW LIST area.



Find your instructions here!

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Units:



Divisions:



Creating an Onboarding Process

- ❑ Start with a welcome
- ❑ Identify/establish norms and set expectations
- ❑ Prepare new members to engage intentionally
- ❑ Establish responsible parties and roles in follow-up
- ❑ Remember this is a process, not a checkmark.
 - ▣ Create a process that makes sense and is manageable

Starting with a Warm Welcome

How do you welcome new members?

Tell us in the chat or unmute your microphone!

The Impact of a Welcome Letter

- ❑ Provides an immediate point of contact
- ❑ Helps the network feel accessible
- ❑ Promotes community and connection
- ❑ Places value on the person and their membership
- ❑ Provides an open door for follow-up to their questions and interests

Sample Welcome Letter

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Let them know...

- You're excited they're here
- How they can connect with members
- What's upcoming/what they can expect
- Where to find important information
- Of any action items that require their follow-up
- Who they can reach out to for more information or with questions about your specific Unit



WELCOME!

Hello [NAME],

Welcome and thank you for becoming a member of the [UNIT] Council for Exceptional Children! We are so excited that you joined our international network dedicated to improving the success of children and youth with disabilities and/or gifts and talents. We are excited to see how CEC supports you, your talents, passions, and work.

There are a variety of the benefits with your membership in the [UNIT]CEC—we offer opportunities to connect with colleagues nearby, access local resources, engage in public policy efforts that impact your practice and your students directly, and attend local meetups and professional development events. There are several ways to get involved through volunteerism, events, and programs and while you can find these on our website, I've listed a few upcoming events and volunteer opportunities below:

- Highlight 3-5 opportunities, hyperlink when possible
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You can also stay up to date on all [UNIT]CEC happenings via our social media platforms! Give us a follow and interact with us on:

- Twitter: @[HANDLE]
- Facebook
- Instagram: @[HANDLE]

On behalf of the [UNIT]CEC board, we are looking forward to connecting with you soon! Looking for something or someone specific? [Let us know how we can help here](#) and one of our board members will be in contact with you soon!

Loyally,

[NAME]

[ROLE]

[CONTACT INFORMATION]

Elements of a Welcome Letter

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- Establish a point of contact
- Identify opportunities for connection
 - ▣ People to connect with
 - ▣ Programs, events and volunteer opportunities
 - ▣ Information/sources of information
- Tone and communication style of your Unit
- Manage expectations
 - ▣ What can they expect from you?

Following the Welcome

We've said hello and made the connection.
Where does onboarding go next?

Establishing your Onboarding Process

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- Questions to ask:
 - ▣ What are we struggling with?
 - (Engagement, volunteerism, connection between members, retaining a particular type of member)
 - ▣ How can an intentional onboarding process help us meet our goals?
 - ▣ Who will manage this process?
 - Does this require the efforts of one person? A committee?
 - ▣ What elements are important to our component's growth?

Bringing it Back to the Board

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- Facilitate a generative discussion on new member needs and retention challenges
 - Take notes and then build sample programs or initiatives
- Identify first steps in building an onboarding program – this can start small!
 - Identify responsible parties
 - Identify when these processes will begin and their cadence (monthly, bi-monthly, quarterly)
 - Identify tracking tools (how will you know if it's working?)
- Identify needs for execution
 - What people or committees can help or run this program?
 - What funding, if any is necessary?
 - How often will the board discuss onboarding tactics to ensure they are working?
- Bring back sample onboarding plans to your board for feedback
- Implement!

Match Your Program to your Needs

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- It is important for your onboarding program to meet the needs and goals of your component.
 - ▣ Board overloaded? This can be a great way to engage members who are not on your unit's board, but desire to volunteer in some capacity.
- Goals may include:
 - ▣ Retention of a target group
 - ▣ Generating interest in volunteerism
 - ▣ Increasing event attendance
 - ▣ Peer-to-peer connection
 - ▣ Membership recruitment
- Follow through on promises or initiatives highlighted in your welcome letter

Onboarding Program Ideas

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There are many ways to engage in CEC membership. We'll take care of the big-ticket items for all members. Consider the unique opportunities within your Unit and recruit your newest members to participate!

- Onboarding buddies
 - Pair new members with engaged, involved members
 - Pair new members with other new members with similar interests, professions, etc.
- Meet and greets
 - New member meet and greet
 - New member and board meet and greet
- Sample experiences
 - Attend committee meeting or rotate committees
 - Attend a book club meeting
 - Social gathering or networking opportunity
 - Offer a guest pass—where can they bring along a non-member friend?
- Highlight new members on social media or in newsletters to promote member to member connection
- Solicit information from new members to connect them to programs or people
- Offer to walk them through the CEC website/Unit's website