



**July 7-9**

**CONNECT  
NETWORK  
GROW**

**CEC LEADERSHIP INSTITUTE**

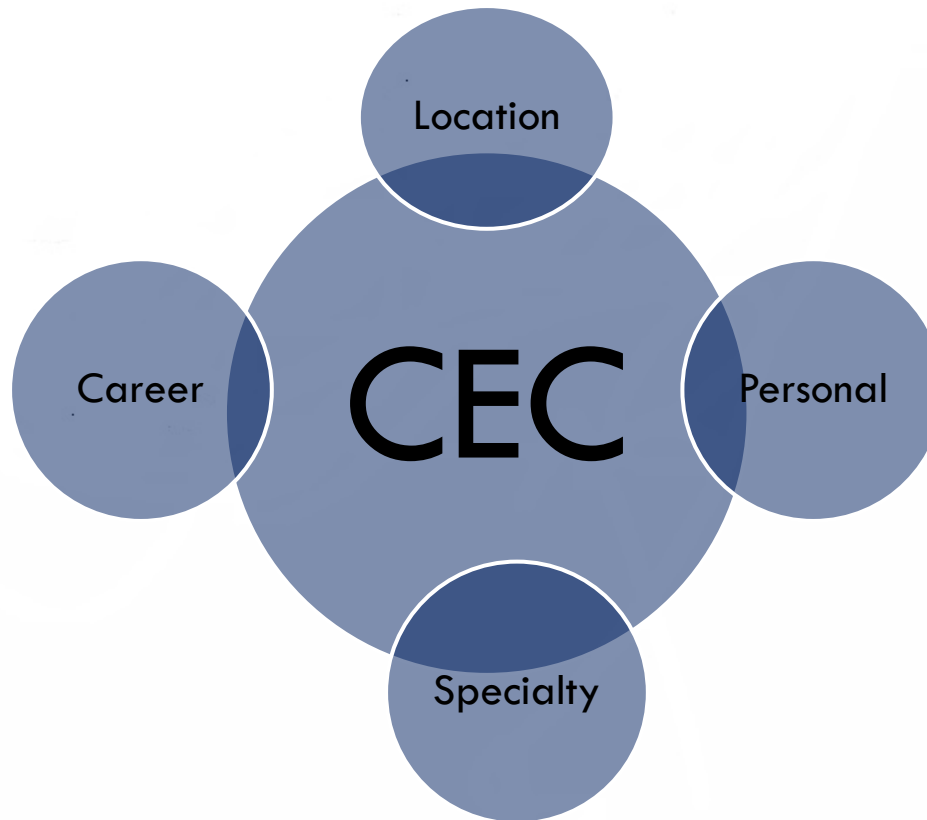
# MEMBERSHIP CYCLE

Chad Rummel, M.Ed, CAE

Brannan Meyers, CAE

# Activating Your Membership

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# Categories

- ❑ Pre-service Student (undergraduate or graduate)
- ❑ Graduate Student
- ❑ Early Career Professional
- ❑ Professional
- ❑ Paraeducator
- ❑ Retired
- ❑ Family/Parent Affiliate

# Tiers

Basic	Full	Premier
Pre-Service Student Members: Liability Insurance		
Resource Library, Quick Takes		
SET Today, Store Discounts, Online Journals		
Communities, Unit Memb, PD/Insurance Discounts		
	All Recorded Webinars	
	Print Journals	
		All Live Webinars
		Free eBook
		Liability Insurance

# Group Memberships

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- ❑ Minimum of five in same school, district, or university
- ❑ About 20% of CEC membership comes through group memberships
- ❑ “Professional Development Package” – for professionals, includes CEC and a division for each person
- ❑ Student Group – Designed for university departments or student chapters, includes insurance
- ❑ University Classroom Package – Provides students a discount code to get reduced membership. Meant for faculty who use CEC resources/journals instead of a textbook.
- ❑ State Packages – Customized upon request to include membership, PD, books, etc; designed for State Departments, typically created to support Early Career

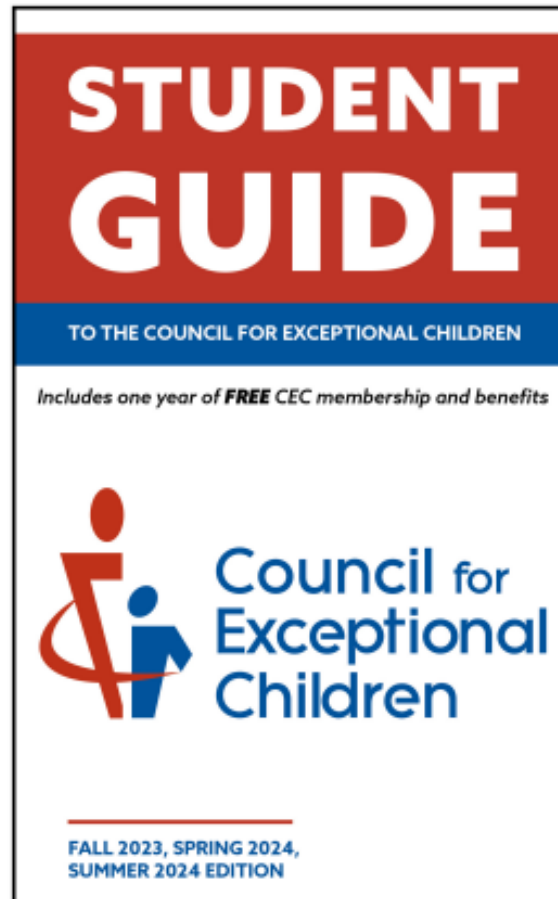
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7

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# Student Guide

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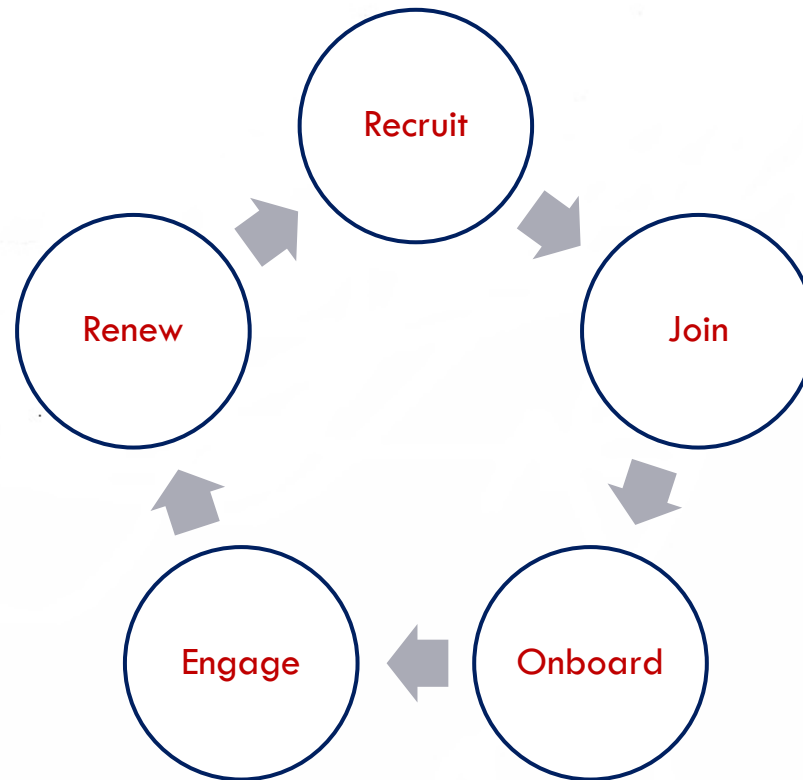




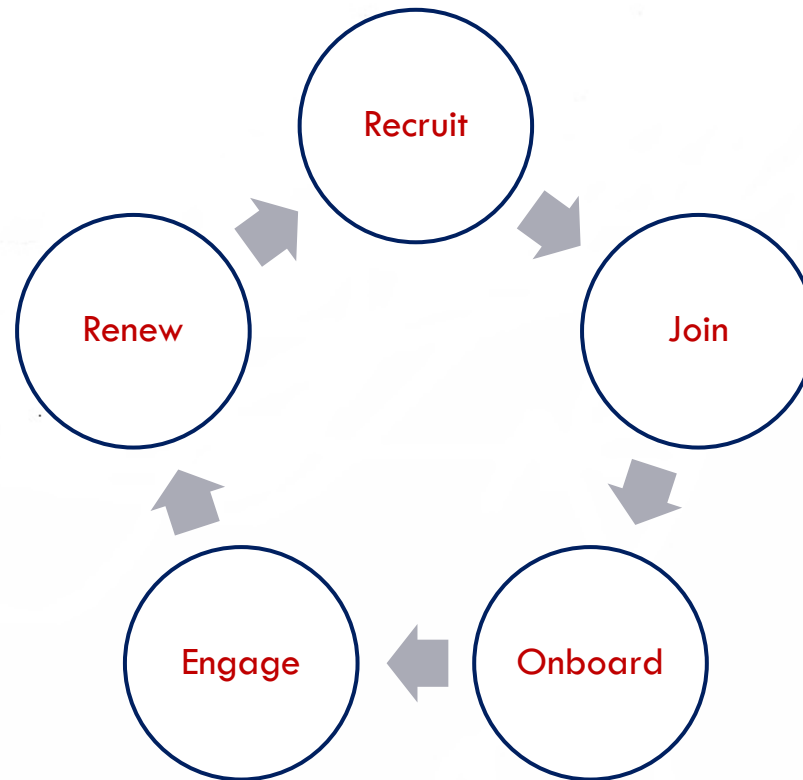
# Understanding Membership



# Understanding Membership

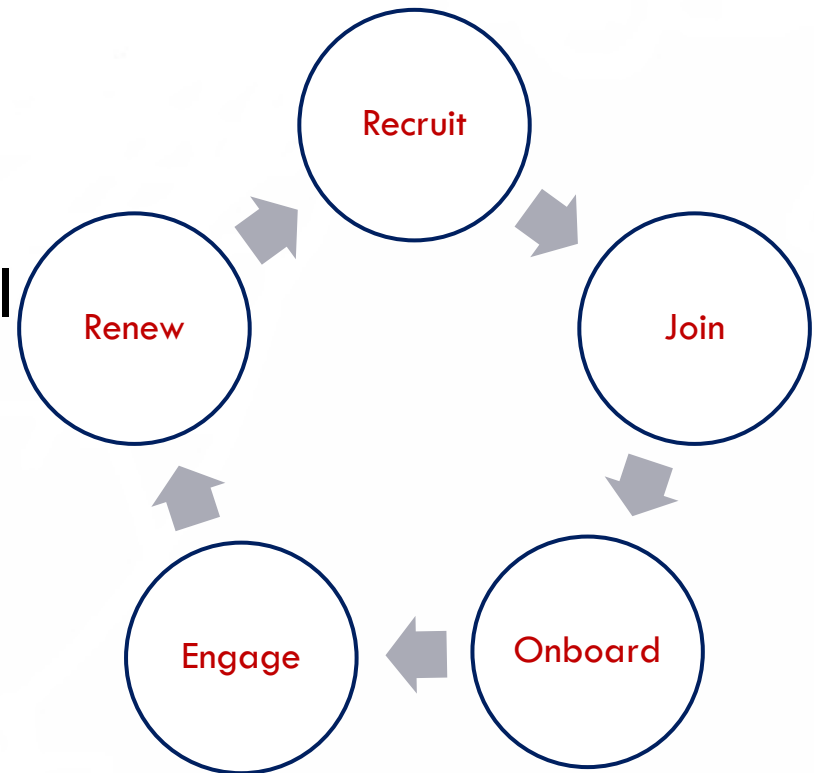


# Which is most important?

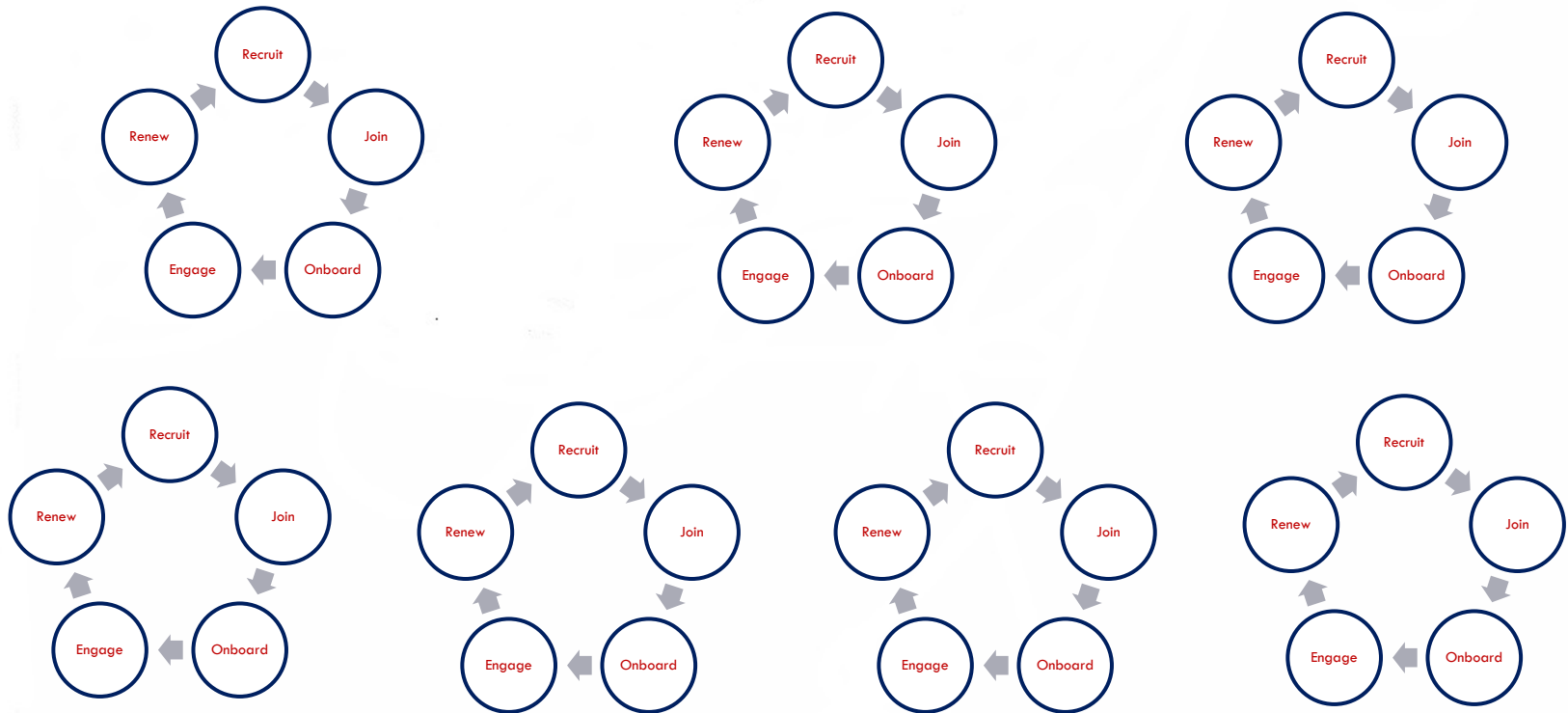


# Understanding Membership

- Pre-service Student
- In-service Student
- Early Career Professional
- Professional
- Paraeducator
- Retired
- Family/Parent Affiliate



# Understanding Membership



# Membership Cycle



Recruit

Join

Onboard

Engage

Renewal

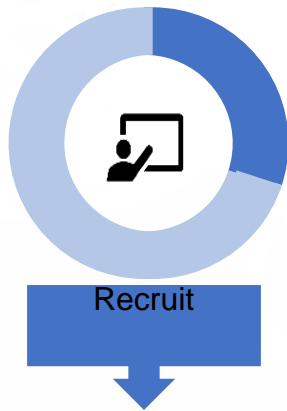
Membership Types

	Recruit	Join	Onboard	Engage	Renewal
Preservice	Active	Active	Active	Active	Active
Inservice	Active	Active	Active	Active	Active
Early Career	Active	Active	Active	Active	Active
Professional	Active	Active	Active	Active	Active
Para	Active	Active	Active	Active	Active
Retired	Active	Active	Active	Active	Active
F/P Affiliate	Active	Active	Active	Active	Active



Recruit

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- Membership recruitment is a never-ending project
- Every year members leave your Unit Or Division
  - ▣ Retire
  - ▣ Change jobs or professions
  - ▣ Lose professional development budget
  - ▣ Unknown reason
- As members leave, must keep new ones coming in
- To get new members, we need a strategy that address
  - ▣ Value to members
  - ▣ Who we are targeting
  - ▣ What tactics will we use



Recruit

16



HUAWEI



oppo



NOKIA

ZTE中兴



MOTOROLA





Recruit

# Why People Join

## Feature

Journals

Webinars/Events

Resources

All Member Forum





Recruit

# Why People Join

Feature	Perceived Value
Journals	Free access to research
Webinars/Events	Free access to training
Resources	Free access to tools/support
All Member Forum	Free access to networking





Recruit

# Why People Join



## Actual Value

Stay abreast on new research and access to practice strategies

Build the skill set you need to be a high performer

Implement new strategies and tools to enhance your job performance

Learn and grow alongside like-minded colleagues and mentors

# Proposition Value

20

- By being in CEC, you will:
  - ▣ Stay abreast on new research and access to practice strategies
  - ▣ Build the skill set you need to be a high performer
  - ▣ Implement new strategies and tools to enhance your job performance
  - ▣ Learn and grow alongside like-minded colleagues and mentors

Emotion-Driven

Member-Focused (“You”)



Recruit

# WHOSE Value?

21

- Who do you want to target?
  - ▣ Career-Level
  - ▣ Job Role
  - ▣ Specialty Area
- What from the proposition value do they care about?

# Proposition Value

22

- By being in CEC, you will:
  - ▣ Stay abreast on new research and access to practice strategies
  - ▣ Build the skill set you need to be a high performer
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  - ▣ Learn and grow alongside like-minded colleagues and mentors



Recruit

# WHOSE Value?

23

- Who do you want to target?
  - ▣ Career-Level
  - ▣ Job Role
  - ▣ Specialty Area
- What from the proposition value do they care about?
- What tactics do you use to put that forward?

Value

Target

Tactic



Recruit

# Passive Recruiting

24

Value

Target

Tactic

- ❑ Acquiring NEW members means you don't have a list of TARGETS.
- ❑ Rely on your brand or your brand ambassadors (members)
- ❑ If you have a strong brand or brand ambassadors, people get referred





Recruit

# Closing the Deal

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## Strategies: Make Sure You Have what Your Potential Members are Looking For



TARGET


VALUE

CTA

### Membership Categories

Select the membership category that's right for you!


**STUDENT**



Current undergraduate or graduate students who have not yet worked as a professional. Student membership is not available to those professionals seeking additional degrees or certifications. Student memberships include a Student Educator Professional Liability Insurance policy for up to \$1 million of coverage (eligibility requirements apply.)

**JOIN AS A STUDENT**

**EARLY CAREER PROFESSIONAL**



Special or general education professionals with three or fewer years of professional experience. All new professionals are welcome — classroom, itinerant, resource teachers, support personnel, researchers, faculty members, administrators, and others.

**JOIN AS AN EARLY CAREER**

**PROFESSIONAL (INCLUDING RETIRED)**



Special or general education professionals with more than three years of professional experience and interested parties. All are welcome — classroom, itinerant, resource teachers, support personnel, researchers, faculty; administrators, family members, retired professionals, and others.

**JOIN AS A PROFESSIONAL**



Recruit

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# Xlosing the Deal

Home Membership Minutes Special Ed Info Awards CASE Events About Board

Search ...

SEARCH

News & Events

CEC 2021 Convention Expo  
Baltimore, MD March 3-6, 2021

CEC 2022 Convention Expo  
Orlando, FL January 15-19, 2022  
(CEC celebrates 100 years)

CEC 2023 Convention Expo  
Louisville, KY March 1-4, 2023

Links

Visit [celebrateexceptional.org](https://celebrateexceptional.org)  
CEC's new membership model gives you options.

You can belong to CEC in one of three ways:

1. **Premier** — Its our most expansive package with exclusive benefits.
2. **Full** — Offers all the benefits of Basic membership as well as special professional development and practical, topical information.
3. **Basic** — Features the most-requested CEC member benefits at our lowest price.

[CEC Membership Brochure](#)  
[CEC Membership At-a-Glance](#)  
[CEC Membership Application](#)





Recruit

# Active Recruiting

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Value

Target

Tactic

- Example: “Stay abreast on new research and access to practice strategies”
  - ▣ **Tactic: “Access our free article by providing your name and email.”**
  
- Example: “Build the skill set you need to be a high performer”
  - ▣ **Tactic: “Attend this free webinar, just provide your name and email.”**



Recruit

# Outreach

28

Value

Target

Tactic

- Use current members—specifically ask them to help recruit
- Locked content
- Free events
- Divisions: Utilize demographics to find potential members
- Divisions: Partner with similar divisions
- Units: Utilize chapters, districts, state department



Recruit

# Breakout

29

## □ Think Of Two Things

- What strategies have you tried that worked?
- Based on this conversation, what might you try in the coming year?



# Joining

30

- Managed by CEC (except subdivisions)
- Group Memberships
  - ▣ School/District (includes one division)
  - ▣ University Student Group
  - ▣ University Student Classroom Package
- Events: Using CEC Promo Codes
  - ▣ Ask about Membership Reseller Program



Onboard

# Onboarding

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- The process you have in place to help your **members** acquire the knowledge and skills that they need in order to make the most of their **membership**



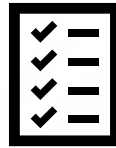
# CEC Onboarding

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Member receives  
welcome email



Member joins



Member receives email highlighting  
membership benefits every two weeks





# Onboarding

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## □ First Impressions Matter

### **Anatomy** of a great welcome email

From It's better if your email goes out from an individual

To:

Subject Make your subject line catchy and straight forward

Greetings Try to make it personal. Use first name if possible

*Welcome message*

Main text

Include a main message that can be one of the following information, setting expectations, providing offers, providing the next steps, learning about the users, product benefits, casual conversation.

Call to action

What next? Provide the next course of action that can be tracked

**SIGN OFF**

Provide a channel to reach out to the support team



# Onboarding

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- Create a “welcome” email series that explains your association and its benefits.
  - ▣ Instead of including every possible bit of information in your new member welcome email, create multiple emails your new members will incrementally receive after they sign up.
- These emails can include:
  - ▣ Information about your Division/Unit
  - ▣ Explanation of Benefits
  - ▣ Helpful tips or recent Blogs
  - ▣ Anything that adds value for your new members
- Send them to a member center on your website



# Breakout

35

## □ Think Of Three Things

- ▣ What you currently do and how you get it done
- ▣ What do you think is most important to share within your division and/or unit ( in early communications)
- ▣ What might you do differently this year to work on onboarding



Engage

# Who Is Happier with CEC?

36



Published in Journal  
Serves on CEC Committee  
Advises Student Chapter



Attends SELS Each year  
No Volunteering  
Doesn't Read the Journals

# Engagement

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- ❑ Right People, Right Opportunities
- ❑ Listening
- ❑ Year-Round Opportunities
- ❑ Opportunities at Various Levels of Commitment
  - ▣ Microvolunteering
  - ▣ Committee Leadership
  - ▣ Board Members
- ❑ Virtual, In-Person
- ❑ Special Interests (Big Pond, Little Fish)
- ❑ Role-Specific, not just member type
- ❑ Utilizing CEC Resources



Engage

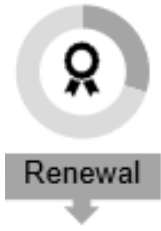
# Breakout

38

## Breakout:

- Discuss how you currently engage each member type in your division/ unit this coming year ( You can think beyond just membership type (higher ed, administrators, etc)
- What are a ways to engage people that you **didn't** do last year

# CEC Renewal



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Member receives  
renewal notice



Member receives  
renewal notice



Member receives  
invoice



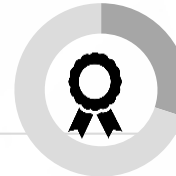
Kevin's email



Member receives 'Sorry  
to See You Go' email



Renewal date



Member receives  
final notice



Board email



# Renewal

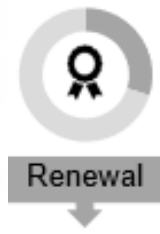
Renewal

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- More than just a bill
  - ▣ Use Proposition Value
  - ▣ What's coming up?
  - ▣ End of cycle benefits
- “Bob, You Expire Tomorrow”
  - ▣ Too late







# Shareout

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Has Anyone Done Anything To Get  
Renewals that Has gotten a Great Result?

# Questions?



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**CEC LEADERSHIP INSTITUTE**

# COMPONENTS 911

## HOW WE CAN HELP

Brannan Meyers, Director of Component Services  
Danielle , Manager of Component Services

# Your Team

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**Brannan:**  
Component  
Services Director

**Danielle:**  
Component  
Services Manager

**Gennith:**  
Chief Engagement  
Officer



Chad ^

# First Things First....

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# Unit & Division services provided by entire CEC staff

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**Membership**

**Communications**

**Operations**

**Events**

**Management**

# Continuing Collaboration

48

- Quarterly Unit Townhalls
- DRC Initiated Townhalls
- CECommunity: Division Leadership, Unit Leadership





# Building Your Bench

49

- ❑ Volunteer Recruitment
- ❑ Volunteer Job descriptions
- ❑ Submit board updates
  - ▣ Quarterly list required!
- ❑ Volunteer Square
  - ▣ Access the report here →



# Engaging With Your Membership

50

## □ Pull membership lists at any time

### ▣ Unit instructions



### ▣ Division Instructions



## □ Provide promotional discounts to support Unit & Division campaigns

## □ Use Our Templates:

### ▣ Social media engagement

### ▣ Member communications

### ▣ Volunteer Recruitment

## □ Division Dialogue

## □ Onboarding

### ▣ Let us assist by promoting CEC Onboarding webinars



**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 children and youth with disabilities and/or gifts and talents. We are here to support you, your talents, passions, and work.

There are a variety of the benefits with your membership in the [UNIT] Council for Exceptional Children, including opportunities to connect with colleagues nearby, access local resources, and professional development events. There are several ways to get involved, and programs and while you can find these on our website, we have listed some of the events and volunteer opportunities below:

- Highlight 3-5 opportunities, hyperlink when possible
- Highlight 3-5 opportunities, hyperlink when possible
- Highlight 3-5 opportunities, hyperlink when possible

You can also stay up to date on all [UNIT]CEC happenings via our social media channels. Please 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!

Loyalty,

[NAME]

[ROLE]

[CONTACT INFORMATION]



**OPEN RECRUITMENT  
VOLUNTEER**

JOIN OUR TEAM!



**WE NEED YOU!**

**REGISTER NOW**

[HTTPS://TINYURL.COM/MRSRCX9X](https://tinyurl.com/mrsrxc9x)



# Supporting Communication

51



- Free website hosting!
  - ▣ Including help with updating and design!
- Online communities specific for your Unit & Division
- Reach a broader audience with CEC's help!
  - ▣ We will share social media posts when you tag us!
- Utilize our social media accessibility resources

# Assisting with Events

52

- ❑ Registration sites through CEC
- ❑ Repackage CEC Programming to utilize as an event opportunity
- ❑ List your component's events on CEC's event webpage
- ❑ Let us provide you with a Zoom account for your meeting
- ❑ Fulfill material requests for conferences and other events
- ❑ Ask CEC staff/board members to provide you with a personal, pre-recorded or in-person welcome/greeting
- ❑ Utilize CEC's Event Accessibility guidelines →



# **ENHANCED UNIT SUPPORT: UNIT ADVANCEMENT PROGRAM (UAP)**

# Purpose & Goals

54

**How:** Provide Individualized Support to CEC Units

## **Goals of UAP:**

1. Increase membership engagement, retention, and recruitment through focused strategy
2. Support Board and volunteer management and engagement
3. Improve Unit Operations & Programming

# Support

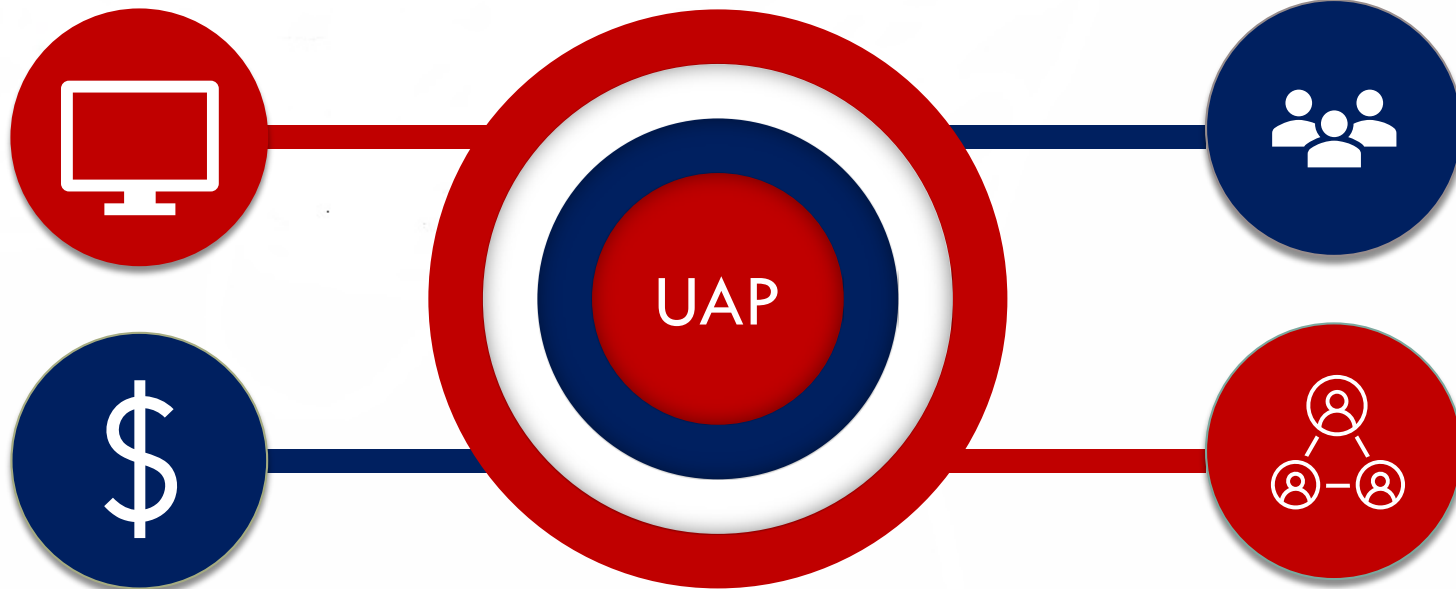
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## Virtual

All meetings are conducted virtually, no travel costs are associated with program

## Monthly Check-Ins

CSM meets with presidential line each month and is available to meet with chairs as needed



## No Cost to Units

CEC covers the cost for Units to participate

## Additional Support

CSM is available to meet with committees for special events/programs

# Getting Started

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## Application

Unit completes UAP matrix and application to identify their areas of need and focus

## Consultation

Unit leaders meet with CSM to discuss application and prioritize needs

## Goals Set

Once goals are prioritized and set they are shared with presidential line for the duration of program

## Onboard Leadership

Leaders are provided with a plan and support from CSM to work toward goals



# UAP Resources/Information

57

- Application link
- Unit Performance Matrix
- Agreement information



# Matrix

Board Management					
	Below Expectations		Meets Expectations		Notes
<b>Term Limits</b>	Term limits are not in place or are outlined in governing document but not followed. <input type="checkbox"/>		Term limits are in place, outlined in governing documents, and are followed. <input type="checkbox"/>		
<b>Elections</b>	Election cycles and eligibility requirements are not outlined in governing documents. <input type="checkbox"/>		Election cycles and eligibility requirements are outlined in governing documents. <input type="checkbox"/>		
<b>Position Descriptions</b>	Unit does not have board member position descriptions outlined. <input type="checkbox"/>		Every board member has a detailed and up-to-date position description and is outlined in governing documents or manuals. <input type="checkbox"/>		
<b>Board Orientation</b>	Unit does not conduct a board member orientation. <input type="checkbox"/>		Unit conducts a board member orientation that includes incoming and outgoing board members. All board members are transitioned by their predecessor and are provided with resources and necessary tools to perform their role. <input type="checkbox"/>		
	Not Demonstrated	Below Expectations	Meets Expectations	Exceeds Expectations	Notes
<b>Volunteer Square</b>	Board members do not/do not know how to use Volunteer Square. <input type="checkbox"/>	Volunteer Square is used inconsistently for soliciting and recruiting volunteers in all volunteer opportunities. <input type="checkbox"/>	Volunteer Square is used for soliciting and recruiting volunteers in all volunteer opportunities. <input type="checkbox"/>	Board members know how to use and promote Volunteer Square on their website. Volunteer Square is used for soliciting and recruiting volunteers in all volunteer opportunities. <input type="checkbox"/>	

# Primary Areas of Focus

59

- Development of local chapters to overcome physical landscape of state
  - ▣ Resources, plans/reports, roll-out process
- Event planning support
  - ▣ Logistics, best practices, communication and surveys
- Media and communication
  - ▣ Newsletters, event/program promotion, website audit and updates
- Operations
  - ▣ Job descriptions, bylaw reviews, election support, resource development, budgeting
- Volunteer recruitment & retention
  - ▣ Volunteer pipeline development, board member succession planning/transitions, development of supporting operational documents, identify needs for new roles or committees
- Increase Unit's credibility with members & non-members

# Additional Unit Support (For All!)

60

- Revival of Units (Actively working with DC)
- Attendance at board meetings to review CEC resources and support available
- Launch of new chapter structures
- Resource development
- Job descriptions
- Unit Town Halls



# Post Assessment QR Code

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