

### MEMBERSHIP and VICE MEMBERSHIP

#### Function

The Membership and Vice Membership functions exist to support the development of new and maintenance of existing members.

#### Policies and Practices

The following policies and practices have been established to guide the membership function:

- Each member is identified as a practitioner, independent, or vendor member. Reference PACT™ Bylaws for determining specific characteristics.
  - Voting – Vendor, Independent, and Practitioner members each receive one vote in matters requiring a vote.
  - Board Positions – Vendor, Independent, and Practitioner members may hold any PACT™ Board position. The Executive Team must consist of both Vendor and Practitioner members; therefore, the Vice President position may be either a Vendor or Practitioner, based on the current composition of the Executive Team.
  - Vendors may not actively market their products and/or services at PACT™ meetings. They may leave printed information about their products/services on the Information Sharing table at PACT™ monthly meetings.
  - The PACT™ membership list is not to be shared outside the organization. Anyone wishing access to the membership list must join PACT™ and pay annual dues. A one-time printing of plain, white labels from the PACT™ membership database may be **SOLD** for \$125 without Board approval providing the following policy statement is attached to the labels:

"The purchase of mailing labels from PACT™ entitles the purchaser to a single mailing of materials to the PACT™ membership. PACT™ is not to be referenced in these materials, as PACT™ is not authorizing, subsidizing or recommending your products or services to the membership. This is a one-time only business arrangement."
- Note:** Members may designate on the membership application form if they do not want their name included in such a printing.
- The only exception to this \$125 charge is when the board approves the exchange of mailing lists with other professional organizations. However, Board approval is still required on such gratis distributions.
  - The Vice Membership Chair will handle all communications regarding label distribution and sales. The Vice Membership Chair will forward any checks for label purchases to the Treasurer along with required documentation.

## Annual Membership Dues

Annual membership dues are collected using the following process:

- Dues are collected from each member of PACT™. Dues cover the period from September 1, of one year, to August 31 of the following year.
- *Dues are \$150 per year per member.*
- If a new member joins PACT™ between June 1 and August 31, they will not be required to pay dues again on September 1. (That is, her/his membership will not expire until August 31 in the following year.)
- Membership may be permanently transferred to another individual in that member's organization. A membership may also follow an individual to a new organization. Either option is acceptable -- it is up to the paying organization's discretion. Memberships may not be "shared" by individuals within an organization (i.e., if a given member does not attend a meeting, another individual from the same organization who is not a member may not use the other individual's membership to get into the meeting without paying a guest fee.)
- Requests for invoices (for membership dues) will be accommodated. The Membership Chair(s) will handle such requests.
- Refunds for Membership Dues will be considered by the Board on a case-by-case basis.
- *Dues are finalized at the joint Board meeting in May.*

## Membership Committee

The Membership Chairs may use committees to assist in carrying out their responsibilities. The Chairs are responsible for recruiting committee members and for coordinating the committee's activities. Committee members have included positions of New Member Orientation Coordinators (NeMO), Guest Liaison, Database Assistant, and Marketing Committee members. The Chairs are responsible for ensuring committee members follow through on assigned tasks.

## Membership/Guest Data Base

Information about each PACT™ member is stored in a database managed by the Vice Membership Chair. The following information about each PACT™ Member is maintained in the database:

Name	Type of Member (practitioner, independent, or vendor)
Title	Vendor Statement
Company Name	Date Joined
Company Address	Date Renewed
Phone Number	New or Renewed Membership
Fax Number	Indicator for excluding name on sellable
Email Address	

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mailing label list

Indicator for Not wanting unsolicited emails

Guests are also included in the database, with name, address, email address and status as a First-time or Returning guest noted.

Primary uses of this information are to:

- Produce member sign-in lists for monthly meetings.
- Enable ad hoc querying about make-up of membership.
- Provide for *Vendor/Host Coordinator quarterly to validate PACT™ membership.*
- Email blasts announcing meetings/special events.

Requests for information from this database should be directed to the Vice Membership Chair.

### **New Member Procedures**

Processing *new members* is the responsibility of the Vice Membership Chair. New memberships come from various sources, e.g.,

- Annual membership renewal drive.
- Monthly PACT™ meetings.
- Individually, as a result of the recruiting process.

The following procedures will occur when a new member joins PACT™:

- Membership dues received will be forwarded to the Treasurer. The amount of money, the date of the check, the check number, and the date processed by membership must be noted on the member's Renewal or Application form. The renewal and/or application form needs to be kept by the Vice Membership Chair for the membership year for tracking purposes. Membership Dues may also be received via PayPal directly to the Treasurer. Treasurer forwards the confirmation of payment to the Vice Membership Chair and Membership Chair for tracking in the database.
- If the new member pays the membership dues to the host at the monthly meeting, the Treasurer will validate that the dues have been paid and indicate it on the new member form. The Vice Membership Chair will collect these forms from the Treasurer at the meeting.
- New Member will be added to the member database.

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- A new member email will be sent to the new member by the Vice Membership or Membership Chair. The new member email looks like:

Hi and Welcome to PACT!

We are so happy to have you as a New or Returning Member of PACT! There are a few items we'd like to point out that will help you feel at home in our organization:

1. PACT Website is [www.pactweb.org](http://www.pactweb.org)
2. Login to the Members Only section of the website! Username: your last name, Password, your zipcode (this will be active in about a week for you)
3. Members Only highlights:
  - Member Spotlight: Get to know your fellow PACT Members on a personal and professional level by reading our mini-interviews!
  - Training Specials: Take advantage of our Vendor Member Discounts to PACT Members
  - Member Directory: Find your PACT friends online – phone # and email address details.
  - Needs and Leads: This is where we post job opportunities and other training related needs of our Members
  - Career Enhancement area: Click here to find PACT Workshop Opportunities as well as an extensive calendar of local and national industry learning and professional growth opportunities.
4. Upcoming meeting details are on the PACT Website, including meeting times, dates, presenter details, and agenda.
5. Pre-register and pay for any guests you may want to bring to PACT via the website, or apply for a Free Guest Pass. It's easy!

Please reach out to us at anytime if you have questions.

Thanks again for joining us and Welcome!

## MISCELLANEOUS INFORMATION

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- New Members will be listed on website and introduced at the meeting.
- Member Spotlight will be published monthly on the website.
- All Board members should also make an effort to personally welcome new members.

### **Monthly Meetings**

The following list includes membership activities prior to, at and after each meeting.

#### ***Prior to Meeting***

- The Vice Membership Chair produces two copies of the membership sign-up lists to be used by the host at the sign-in table. These lists need to be brought to the meeting site by 7:30 AM.
- The Vice Membership Chair produces a list of members and their companies who have joined since the last monthly PACT™ meeting, and the number of members and guests in attendance at the meeting for the upcoming Board meeting.

#### ***During the Meeting***

- The Vice Membership Chair arrives by 7:30AM and assists the host as needed.
- The Membership Chair arrives by 8:00AM to assist as necessary and to greet new members and guests.
- The Membership Chair addresses the membership with any pertinent information regarding the database, the directory, etc. S/he also then facilitates New Members introducing themselves to the membership.
- The Vice Membership Chair updates PACT™ database as appropriate during the business meeting.
- The Vice Membership Chair collects the sign-in sheets at the end of the meeting.

## MISCELLANEOUS INFORMATION

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### ***After the Meeting***

The Vice Membership Chair updates the membership database as appropriate, including updating Returning Guests and First-time Guest information.

### **PACT Facts**

The Membership Chair is responsible for having PACT™ Facts available for new members and for PR events and for updating PACT™ Facts as necessary on an annual basis with Board input and approval.

### **Recruiting New Members**

- The Membership Chair is responsible for supporting recruiting efforts for gaining new PACT™ members and communicating about recruiting activities to the PACT™ Board at the monthly PACT™ Board meetings.
- Methods for recruiting new members include, but are not limited to, the following:
  - Responding to individuals who inquire about PACT™.
  - Facilitating the follow-up with members who do not renew their memberships.
  - Coordinating with the Membership Committee to send out information to first-time guests.
  - Contacting organizations that do not have a representative at PACT™.
  - Promoting PACT™ awareness through Board-approved public relations venues.

### **New Member Orientation (NeMO)**

The New Member Orientation Committee exists to make our new members feel welcome and supports the transition from being a guest to feeling “plugged-in” as a member. Committee members answer questions and help connect new members to existing members. NeMO provides new members a way to get involved with PACT™ by ensuring they are aware of available Board and volunteer positions throughout the year (in case they missed our annual call for volunteers).

### ***Committee Responsibilities***

Resources: 2-3 people on the NeMO committee.  
Time commitment: 1-2 hours initial development plan, then 1 hour every other month at the PACT™ meetings. NEMO Lunch 2x/year  
Effort includes: Updating the new member orientation presentation.  
Presenting the benefits of PACT™ and answering questions.  
Reviewing membership materials.

The Membership Chair, with the help of the Vice Membership Chair, will facilitate this committee.

## MISCELLANEOUS INFORMATION

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### **Membership Directory**

- The Membership Directory is available online for all PACT Members at [www.pactweb.org](http://www.pactweb.org)

### **Members Only Information**

The Vice Membership Chair is responsible for tracking and informing members of their Login and Password for access to the Members Only section of the PACT™ website.

### **Public Relations**

The Membership Chair is responsible for the public relations function. This involves serving as a liaison with other trainers and other training groups to provide them with information about PACT™ and vice versa.

Toward this end, the Membership Chair should be listed as a contact for PACT™ in training-related periodicals such as:

- Computer User – updated annually in May
- Star Tribune – place monthly meeting announcements
- Pioneer Press – place monthly meeting announcements

Membership Chair coordinates other promotional activities. Coordinates PACT™'s participation in industry expos as directed by the Board.

### **Membership Forms**

See the Forms folder for examples of the following:

- Membership Application/Renewal
- Membership Receipt Form