

The 'Compleat' Checklist For Association Management

Supporting you to maintain an
engaged membership



Bringing together communities to
effect change and inspire



YOUR ASSOCIATION MANAGEMENT

checklist

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- The Brief
- Identify clear aims & objectives
- Consider the challenges you may face
- Set out clear vision & values - how will they be achieved?
- Research & implement software to manage the membership
- Decide when your membership will run
- Write a Governance document if you haven't already
- Launch a website & social media pages, keep content up to date
- Identify how you will process new member requests & welcome them
- Set up a GDPR compliant membership database to store details
- Compose a clear GDPR compliant privacy policy
- Set up various convenient payment methods for members
- Identify how member queries will be resolved promptly

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- Ensure there is a plan in place to carry out general administration
(Including updating membership details which can be very time consuming)
- Decide how you will carry out membership renewals
- Send out regular communications to members (i.e. Newsletters)
- Ensure all outstanding payments have been received/cleared
- Make sure the monies collected mirrors your report
- Remove past/non-paying members from website access
- Send renewal receipts and confirmation letters
- Update your YoY comparison report and track your growth
- Review membership feedback and identify reasons for non renewals

For more help contact us!



Contact Heather on 01489 668333