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Membership Recruitment and Retention Plan and Training Report for JFBPW

June 29, 2008

This publication was produced for review by the United States Agency for International Development. It was prepared by Ms. Dania Gharaibeh, dTS

Membership Recruitment and Retention Plan and Training Report for JFBPW

USAID JORDAN ECONOMIC DEVELOPMENT PROGRAM (SABEQ)

CONTRACT NUMBER: 278-C-00-06-00332-00

BEARINGPOINT, INC.

USAID/JORDAN

OFFICE OF ECONOMIC GROWTH

JUNE 29, 2008

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DELIVERABLE No.: 8.3.5.C.10.33.1 JFBPW

MEMBERSHIP RECRUITMENT AND RETENTION
PLAN

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EXECUTIVE SUMMARY

For a membership-based organization to be sustainable, it must continually strive to expand its membership. This, however, will only happen if the organizations' governance structure responds to the needs of its members in a relevant fashion. JFBPW requested technical assistance from the USAID Jordan Economic Development Program (SABEQ) to design an achievable recruitment and retention plan targeting corporate memberships and youth.

In response to this request, a brief organizational assessment was conducted. Based on the results, a strategy was developed in a participatory fashion with JFBPW's management. The plan begins by identifying the institutional gaps that must be filled for the association to achieve its goals of increasing corporate members from 5 to 18 by the end of FY2009, and establish a system to include young members.

PLAN DEVELOPMENT AND TRAINING

OVERVIEW

A two-day workshop was conducted at the Forum premises on June 13th and 29th, 2008 illustrating the implementation process of the plan. The workshops were attended by:

- Wadha EL Safady- Board Member
- Rania Al Khatib- Chief Executive Officer
- Dina El Moghraby- Membership Officer
- Two University Interns from Jordan University

The workshop included a thorough explanation of how JFBPW can achieve the goals set in the plan and utilize existing resources. Workshop topics included:

- Roles and Responsibilities of the Corporate Membership Officer, and Youth Officer
- Understanding your members' drive and providing relevant value-added services
- Recruitment techniques and approaches for corporations and youth

OUTCOMES

- The JFBPW team has a better understanding of recruitment and retention methods for corporations and youth.
- JFBPW has an action plan for FY2009 aimed at increasing membership revenues from corporations.
- JFBPW has a strategy to increase the number of professional and businesswomen through corporate members.
- JFBPW has an action plan to establish, recruit, and retain youth membership schemes.

NEXT STEPS

JFBPW is expected to begin mobilizing its resources to launch both action plans to increase corporate members and establish a youth membership scheme. A Monitoring and Evaluation plan is also embedded in the plan submitted to JFBPW. The Forum must periodically conduct customer satisfaction surveys at all levels and update the action plans accordingly.

RECRUITMENT AND RETENTION PLAN

OVERVIEW

In May 2008, the Institutional Transformation Solution at SABEQ conducted a baseline assessment to evaluate the Jordan Forum for Business and Professional Women's sustainability and services relevancy status. The assessment's results indicated that 12% of JFBPW's revenues are from membership dues, while 43% from grant and 45% from non-dues (income generating activities). In order for a membership-based organization to be sustainable, it must continually strive to expand its membership. This, however, will only happen if the organizations' governance structure responds to the needs of its members in a relevant fashion. Current JFBPW's membership schemes are as follows:

Individual Memberships	
Type	Annual Fee in Jordanian Dinars (JD)
Group A: Women Investors and Businesswomen	75
Group B: Professional Women with an income <300 JDs/month	50
Group C: Professional Women with an income >300 JDs/month	30
Corporate Memberships	
Institutions owned by women, managed by women, or support women's participation	2000

THIS PLAN'S OBJECTIVES:

Objective I: Increase corporate memberships from 6 to 18 corporate in year 2009.

Objective II: Establish a membership scheme attractive to youth

PREREQUISITES TO ACHIEVING OBJECTIVE I: INCREASE CORPORATE MEMBERSHIPS FROM 6 TO 15 CORPORATE IN YEAR 2009

ASSIGN A MEMBERS' RELATIONS OFFICER:

Assigning a members' relations officer as the focal person for all members will assist JFBPW in maintaining public relations with its corporate and individual members. This individual must possess excellent sales skills and must be an effective communicator. In a nutshell, the members are JFBPW's clients and this person will be their customer service. His /Her roles and responsibilities will include:

- Resolves members' requests, questions and complaints and frequently requiring analysis of situations to determine best use of resources;
- Serve as a liaison between the members and the Recruitment and Retention Committee (see below);
- Solicits sales of new or additional services in close coordination with the Recruitment and Retention Committee and JFBPW's Chief Executive Officer;

- Sets up new members, maintains records, prepares reports and performs work processing assignments and related clerical duties;
- Coordinate the delivery of the services to the members.

ASSIGN A RECRUITMENT AND RETENTION COMMITTEE:

Assigning a recruitment and retention committee will assist JFBPW in monitoring and evaluating the progress of this plan. The committee's roles and responsibilities will consist of the following:

- Develop and implement an annual Monitoring and Evaluation plan.
- Meet on a monthly basis to follow up with the members' relations officer, identify opportunities and challenges.
- Mobilize resources for the membership relations personnel
- Issue a quarterly report that measures memberships' progress and provides recommendations.

PROVIDE RELEVANT SERVICES TO CORPORATE:

JFBPW can provide a variety of value-added services to recruit and retain corporate members. These services can include the following:

- The prerogative is to nominate up to 30 women employees (depending on the membership schemes illustrated in the section below) to become members of the Forum. The women nominated are thereby able to take advantage of all the normal benefits of being a member of the Forum, without having to pay the annual subscription fee;
- Opportunities to address the Forum members, at networking functions and seminars;
- Opportunities to address the Forum members for direct marketing of the goods and services;
- Opportunities to address the Forum members for market research activities; and
- Opportunities to profile women achievers in the corporate member company, on the JFBPW's website and in newsflashes to members.

UNDERSTANDING YOUR MEMBERS' DRIVE:

It is absolutely critical that the JFBPW understands the drive behind its members' memberships. Studies and interviews with the Forum individual members have shown that their motivation to become members can be divided into five main categories:

1. Women who share the values of the Forum and want to be part of a constituency that supports business and professional women;
2. Women who want to build their capacity as business and professional women through the programs the Forum offers;
3. Women who seek prestige from affiliation with a recognized body;
4. Women business owners seeking a support body in accessing finance and markets; and
5. Women who seek networking opportunities with their counterparts in the sector.

A survey to identify the motivation behind corporate memberships has not been conducted by the Forum due to the limited number of current members; however, it is widely known that corporations join associations for increasing visibility and promotional purposes. The Forum

has also identified a need amongst potential corporate members to provide human resources needs.

Both corporations and individuals can complement each other's needs with the Forum acting as an intermediary. The Forum must conduct annual surveys to monitor trends and changes in the needs and update their services accordingly.

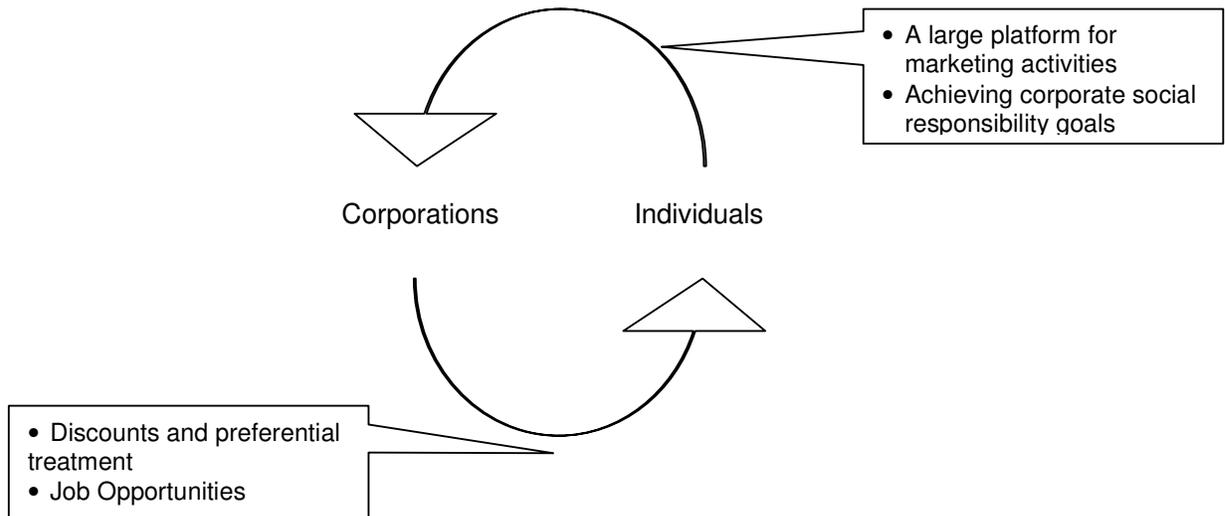
PROVIDE A VARIETY OF MEMBERSHIP SCHEMES TO CORPORATIONS:

Currently, the JFBPW has one membership scheme offered to corporations in which they pay a fee of 2,000 JDs per annum. Further flexibility in membership schemes will provide potential members with more options to suit their needs. JFBPW can follow the following schemes:

Category	Prerequisite	Membership benefits	Annual Fee in JD
Category A	<ul style="list-style-type: none"> • Solid reputation in industry or trade • Recommended by three of the Forum's board members • The company has 100 employees or more. • Women represent at least 20% of the company's employees • A commitment to supporting women • The commitment to provide the Forum members with special rates and discounts to their services or products 	<ul style="list-style-type: none"> • The prerogative to nominate up to 30 women employees to become members of the Forum free of annual charge • The Forum will act as a platform for all marketing activities agreed upon in the membership agreement (direct marketing, market research, seminars, events...etc). • The Forum will place the company's logo on all marketing material printed after their membership, including the Forum's website. • The Forum will provide a public listing and acknowledgement at all member meetings. • Provide the company with female caliber and human resources upon request. • The company will get the Forum's periodic publications free of charge. 	3000
Category B	<ul style="list-style-type: none"> • Solid reputation in industry or trade • Recommended by three of the Forum's board members • The company has 50 to 100 employees. • The commitment to supporting women • The commitment to provide the Forum members special rates and discounts to their services or products 	<ul style="list-style-type: none"> • The prerogative to nominate up to 10 women employees to become members of the Forum free of annual charge • The Forum will act as a platform for all marketing activities agreed upon in the membership agreement (direct marketing, market research, seminars, events...etc). • Provide the company with female caliber and human resources upon request. • The company will get the Forum's periodic publications free of charge. 	2000
Category C	<ul style="list-style-type: none"> • Solid reputation in industry or trade • Recommended by three of the Forum's board members • The company has 50 employees or less. • The commitment to supporting women • The commitment to provide the Forum members special rates and discounts to their services or products 	<ul style="list-style-type: none"> • The prerogative to nominate up to 10 women employees to become members of the Forum free of annual charge • The Forum will act as a platform for all marketing activities agreed upon in the membership agreement (direct marketing, market research, seminars, events...etc). • The company will get the Forum's periodic publications free of charge. 	1000

INCREASE INDIVIDUAL MEMBERSHIPS THROUGH CORPORATE MEMBERS (THE WIN-WIN SCENARIO):

While the prerogative of membership of individuals within a company is seen as an added value service JFBPW is offering their corporate members, it is also expanding their constituency. This not only expands JFBPW's database but also strengthens their position to attract more corporation as a platform. On the other hand, the more corporate membership the Forum attracts, the more the variety of discounts and preferential treatment the individual members will get as a result of their membership.



CUSTOMIZED SERVICES:

JFBPW can also take a step further and customize its approach to potential corporate members depending on the services and products it offers. Below are a few examples on how the Forum can diversify its membership database:

Corporate Approach	
Sector	Services
Banks	<p>Many banks are currently opening their doors to women clients, the Housing Bank in Jordan, for instance, has started a line of products especially for women. Moreover, the Amman Cairo Bank has a line of credit that is between the SME and micro segment targeting women. This is an opportunity for JFBPW to use as an entry point for bank’s memberships. The Forum can offer the banks a chance to market their products directly to the individual members. The Forum’s approach must focus on the fact that its members are businesswomen who require capital and financial services.</p> <p>On the other hand, JFBPW must demand that the banks provide its clients with preferential treatment. Such treatment can include the Forum’s ability to guarantee selected businesswomen in return for leniency with collateral requirements.</p>
Jewelry and Handicrafts Home Products Food Furniture Cosmetics Garment Pharmaceuticals	<p>These companies spend tremendous amounts of money on marketing their products to their targeted market segments. JFBPW must conduct a brief research to collect information on what companies spend on a billboards, TV or press media advertisements to use in their pitch while recruiting new members. These sectors target women, which is a market segment the Forum has a direct link to. JFBPW can offer these companies a direct link to their market segment upon their membership. The companies will have an opportunity to do “direct marketing”, a marketing strategy that is becoming a trend amongst marketers.</p> <p>Moreover, many of these companies must base their marketing strategies on research. Typically, the company would resort to a market research company and buy the service for a considerable fee. JFBPW can provide these companies with focus groups and sampling volunteers as a service upon their memberships.</p> <p>On the hand, JFBPW must demand promotions and discounts to their individual members.</p>

OBJECTIVE I: ACTION PLAN 2009

Activity	Task	Responsible Party	Timeframe
Assign a Members' Relations Officer	Select the Officer	CEO	January
	Develop a detailed job-description (including his/her goal for FY2009)	Interns Volunteers	January
	Train the officer for 3 weeks	CEO	February
Assign a Recruitment and Retention Committee	Select the Committee members	CEO	January
	Formulate their roles and responsibility	Interns Volunteers	January
Develop Marketing Material	Design and print membership cards	Interns Volunteers	February
	Design and print new membership schemes' brochure	Interns Volunteers	February
	Develop Corporate Membership Presentation	Interns Volunteers and CEO	February
Mobilize resources before approaching corporate	Identify potential corporate members	Committee and Officer	February
	Locate contact information of contact people	Officer	February
Sales	Set the sales goals (in numbers)	Committee and CEO	March
	Taking appointments with corporations	Officer	March/April
	Making sales visits the first three weeks	Officer and CEO	March/April
	Evaluate officer's sales capabilities	CEO	April/May
	Assign sales responsibilities according to the evaluation	CEO	April/May
Evaluation	Mid-year assessment measurable against sales goals	CEO	June
	Develop the Customer satisfaction survey	CEO and Officer	June
	Implement the customer satisfaction survey	Officer	June
	Analyze results	Officer	June
	Update the action plan based on the evaluation and survey	Officer and CEO	June

PREREQUISITES TO ACHIEVING OBJECTIVE II: ESTABLISH A MEMBERSHIP SCHEME TARGETING YOUTH

ASSIGN A YOUTH MEMBERS' RELATIONS OFFICER:

Assigning a youth members' relations officer as the focal person for soliciting, maintaining, and servicing the young members of JFBPW. This person will be solely in charge of following up the day-to-day requirements of the youth and networking their needs with existing resources. His /Her roles and responsibilities will include:

- Develop and implement an annual work plan;
- Develop and implement campaigns to solicit memberships from key Jordanian Universities;
- Develop and implement mentorship and career shadowing activities between young Forum members and the more seasoned businesswomen;
- Serve as a liaison between the members and the Youth Committee (see below);
- Sets up new members, maintains records, prepares reports and performs work processing assignments and related clerical duties; and
- Coordinate the delivery of the services to the members.

ASSIGN A YOUTH COMMITTEE:

Assigning a Youth Committee will assist JFBPW in monitoring and evaluating the progress of this plan. The committee's roles and responsibilities will consist of:

- Develop and implement an annual Monitoring and Evaluation plan;
- Meet on a monthly basis to follow up with the members' relations officer, identify opportunities and challenges;
- Mobilize resources for the membership relations personnel; and
- Issue a quarterly report that measures membership progress and provides recommendations.

PROVIDE RELEVANT SERVICES TO YOUNG WOMEN:

Young women entrepreneurs in Jordan could benefit from JFBPW's networks and capacity building programs. It is important that the Forum foster relationships with the youth to nurture them into entrepreneurial and innovative adults. In order to effectively integrate youth, the Forum must develop a membership scheme that offers relevant services to youth. The Forum can divide its services into two categories:

Academic services:

Affiliating faculty to the Forum as honorary members will provide it with a database of academia that it can tap on and network with the students through periodical events to discuss certain academic issues.

Career Support Services:

- **Mentorship and Shadowing:** the Forum will develop mentorship and shadowing services for young women in the last years of college/university based on the members' request. The Youth Membership Officer will be in charge of connecting young women to the more seasoned ones and develop an agenda for their mentorship and shadowing program.
- **Internships:** the Forum will have agreements with some of its largest corporate members to accept summer interns and coordinate the youth members' placement in it.
- **Success Stories Highlights:** successful businesswomen who are members of the Forum will serve as role models for the young female members. Career-oriented female role models can be highlighted through occasional seminars to change the mind sets of young women.

UNDERSTANDING YOUR MEMBERS' DRIVE:

A proper study to analyze the drive behind young women's membership has not been conducted. However, anecdotal studies show that young career oriented women – ages 18 to 25 - seek a support network that can provide them with an entry point to their desired careers. Psychological studies on this age group- particularly women- show that having a role model is essential to self-actualization. The following are the most significant drives that motivate youth's affiliation to business associations:

- **Career entry point:** university students often lack the contacts that could be utilized in the practical work environment and have to rely on their families. This detracts their sense of independence and sometimes limits their career choices. Both the mentorship and internship programs will provide the youth with the opportunity to independently making career choices and locating opportunities.
- **Capacity building:** education received in academia often lacks practicality and updated business skills. The Forum will engage the youth in their various business skills' capacity programs.

PROVIDE A SUITABLE MEMBERSHIP SCHEMES TO YOUTH:

The Forum must not expect youth memberships to be lucrative. The purpose of creating this membership scheme is purely altruistic and must remain so. It is also understandable that the youth, once employed and economically independent will become individual or corporate members. To this end, investment in youth memberships is a long-term one that aims at branding the Forum as the network of choice for future business and professional women. There will be one category of membership for young women:

Category	Prerequisite	Membership benefits	Annual Fee in JD
Youth membership	<ul style="list-style-type: none"> • Must be between the ages of 18 to 25 • Must be a student in a university, vocational or technical school 	<ul style="list-style-type: none"> • Mentorship and Shadowing program • Internship opportunities • Attend success stories seminars • Formal and informal career counseling • Business Skills' training • Connections to Faculty 	20

OBJECTIVE I: ACTION PLAN 2009

Activity	Task	Responsible Party	Timeframe
Assign a Youth Officer	Select the Officer	CEO	January
	Develop a detailed job-description (including his/her goal for FY2009)	Interns Volunteers	January
	Train the officer for 3 weeks	CEO	February
Assign a Recruitment and Retention Committee	Select the Committee members	CEO	January
	Formulate their roles and responsibility	Interns Volunteers	January
Develop Marketing Material	Design and print membership cards	Interns Volunteers	February
	Design and print Youth membership brochure	Interns Volunteers	February
	Develop Youth Membership Presentation	Interns Volunteers and CEO	February
Mobilize Resources	Identify Universities and take entry permission to establish a sign-up booth	Committee and Youth Officer	April
	Identify internship opportunities and sign agreements with companies	Youth Officer, Corporate Officer	April
	Identify mentors and sign commitment letters with them	Youth Officer and Individual Members' Officer	April
	Identify faculty members and grant them honorary memberships	Committee and Youth Officer	April
Recruit Youth	Set the goal number of recruits	CEO	May
	Develop a schedule for establishing one-day booth in each selected university	CEO and Youth Officer	May
	Establish a booth in each university and collect contact information of youth inquiring about the Forum	Youth Officer	May
	Conduct a seminar inviting all inquirers and sign up the first batch of young members	CEO and Youth Officer	May
Service Delivery	Identify members needs and match with existing mentorship recruitment and internship opportunities	CEO and Youth Officer	June
	Conduct one on one counseling sessions to finalize action plan between the young member and the mentor or internship recruiter	Youth Officer	June
Evaluation	End of Year assessment measurable against recruitment goals	CEO	September
	Develop the Young members' satisfaction survey	CEO and Youth Officer	September
	Implement the Young members' satisfaction survey	Youth Officer	October
	Analyze results	Youth Officer	October
	Update the action plan based on the evaluation and survey	Youth Officer and CEO	November/December

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