Making the Grade: Membership Performance Assessment™

Grade	*Membership Acquisition*
A	Have at least 3 well developed sources of new members Using direct mail as an acquisition tool multiple times a year Using online and social media resources to attract and convert new members Projecting the number of new members expected by month Attracting enough new members to grow the program
B	Tracking new members by source Have at least 2 well developed sources of new members Consistently attracting enough new members to replace non-renewing members
C	Have multiple sources of new members Have a budget for new member acquisition Sometimes attracting enough new members to replace non-renewing members
D	Relying on only one source of new members Not attracting enough new members to replace non-renewing members
F	Not doing anything to attract new members Waiting for members to join on their own

Grade	*On-Site Sales*
A	Have trained staff working the gate with clip board in hand Offer regularly scheduled training and rewards for sales staff On-site sales staff reports to Membership Have signage that says "Join Now!"
B	Offer incentives to on-site sales people or admission staff Have signage that says "Join Now!"
C	Encourage on-site sales by admission or museum shop staff Have signage that says "Join Now!"
D	Only a passing interest in getting people to join while visiting
F	No on-site sales efforts

Grade	*Direct Mail Acquisition*
A	Mailing 2 or 3 campaigns per year Evaluating each campaign fully Testing in every mailing
B	Mailing at least 1 time per year
C	Mailing only at times of major exhibitions Will allow for trade of names with like organizations
D	Infrequent use of direct mail Will not allow list trades
F	No use of direct mail

Grade	Renewals
A	Renewal rate of 75% Sending renewal reminders via mail and email — at least 4 touches Asking for renewals on-site if renewal is within 60 days Know program's first year renewal rate
B	Renewal rate of 70–75% Sending more than 3 renewal reminder letters or emails
C	Renewal rate of 60–70% Sending 3 renewal reminders
D	Renewal rate of 50–60% Sending less than 3 renewal reminder letters or emails
F	Renewal rate less than 50% OR Renewal rate unknown Sending only 1 renewal reminder Not sending renewals on regular basis

Grade	Lapsed Member Recapture
A	Performing lapsed member appeals by mail, email, and phone
B	Performing lapsed members appeals by 2 of the 3 methods listed above
C	Performing lapsed member appeal by mail (special appeal) or phone
D	Performing lapsed member appeal only in acquisition direct mail program
F	Doing nothing to recapture lapsed members

Grade	Membership Upgrades
A	Designing benefits and dues structure to encourage upgrade Performing upgrade specific campaigns via mail and phone or email annually
B	Offering a premium or special offer to encourage upgrade Performing upgrade campaign via mail, phone, or email
C	Suggesting upgrade in the P.S. of a renewal letter
D	Listing all levels of membership on all brochures
F	Never asking for an upgrade Not listing upper levels on brochures and renewal forms

Grade	Membership Dues
A	Evaluating cost of membership at every level annually Pricing membership accordingly Have a strategy for regular dues increases Have performed membership surveys/research on benefits, usage, desirability
B	Have increased dues in past 3 years
C	Have increased dues in past 5 years Offering membership at various levels
D	Offering membership at levels less than $50
F	Have not increased dues in last 10 years Offering memberships at $40 or less

Grade	Membership Benefits
A	Surveying membership to determine favorite or most used benefits Benefits offered at key upgrade levels Tracking usage of benefits
B	Multiple benefits at each level
C	Tiered benefits
D	Only one benefit at some levels
F	No benefits listed

Grade	Digital Marketing
A	Tracking online sales of memberships Have an online member portal Have a mobile friendly website Communication with members via email 2–3 times per month Prioritizing email capture for both members and visitors Have 70% of members' email addresses Have a social media strategy for membership acquisition Have authority and responsibility to post on Facebook Using online advertising and email marketing for membership acquisition Using marketing automation software to personalize content
B	Encouraging joining and renewing online Have a membership presence on Facebook with regular mentions Sending an e-newsletter monthly Using email marketing for membership acquisition Have 50% of members' email addresses
C	Have a website with a membership landing page and e-commerce capability Sending an e-newsletter quarterly Have less than 30% of members' email addresses
D	Have website but no membership join functionality Not using email for membership acquisition or member communications
F	No website, email, or digital marketing efforts for membership

Grade	Members as Donors
A	Asking for non-membership gift more than 1 time per year via mail, phone, email Using segmentation and personalization to suggest gift amounts and upgrades Include email asks with video
B	Asking for non-membership gift more than 1 time per year via mail Supplement mail with online asks
C	Asking for non-membership gift once per year
D	No formal campaign, but have an annual fund pool
F	Do not accept or encourage non-member gifts