

SECTION 8. MEMBERSHIP & VOLUNTEER MANAGEMENT

FOL memberships are for one year and are titled according to the main membership guidelines in the database and thank-you notes. The minimum contribution to be a full member is \$15. Chapters should consult their bylaws for any other membership regulations. Memberships are considered to be tax-deductible to the full extent of the law.

Chapter Responsibilities to FOLMC Regarding Membership

Everyone who joins a Friends of the Library chapter is automatically a member of FOLMC.

Each chapter is required to remit \$5 to FOLMC for every new and renewing member recruited through the chapter, along with a list of all members and their contact information. Contact information should include name, address, salutation, etc., so that all members will receive the quarterly FOLMC newsletter. Chapters should also provide members' email addresses to the extent they have them, because FOLMC maintains a membership email list to send out announcements.

The information can be sent to the FOLMC by—

- MCPL interdepartmental mail,
- Email, or
- USPS.

Dues and membership lists are due to FOLMC the **first of each month**.

These dues cover a variety of administrative costs incurred by FOLMC that allow the organization to meet standards for conducting business as a nonprofit, to help stay networked in the library community, and to maintain visibility. It is less costly and more efficient to handle such costs at the parent organization than for each individual chapter to do so.

Specifically, FOLMC pays for the following:

- United for Libraries and Citizens for Maryland Libraries membership
- Maryland Association for Nonprofit Organization membership
- Directors & officers Liability Insurance
- Website maintenance and fees
- Newsletter production and mailing
- Database maintenance and upgrades
- Technical assistance, such as annual workshops and networking opportunities
- Annual financial audit
- Bookkeeping and credit card fees

Chapter Responsibilities to Its Members Regarding Membership

Chapters are responsible for acknowledging all donations made to them.

Memberships are considered to be a tax-exempt donation made to a 501(c)(3). It is a best practice to send a tax-receipt for all memberships under \$250 (\$250 being the threshold for which a tax-receipt is required by law).

Tax-receipt language can be incorporated into communications that the chapter may already send to all new/renewing members.

Although there is no compiled list of information the IRS requires, it is suggested that tax-exemption letters should contain the following:

- Address of the chapter
- Tax-exemption number
- Amount and date of membership
- The Secretary of State's disclosure statement
- A statement indicating whether or not any goods or services were provided in return for the gift

See Appendix 8-A for a sample tax-exemption letter.

All membership cards are sent from the FOLMC office directly to the members once the monthly lists have been processed. Those members who donate through the FOLMC office receive both their card and their tax-exemption letter simultaneously.

FOLMC Responsibilities to Chapters Regarding Membership

The FOLMC office often receives member applications that designate chapters as the recipients for their gifts [dues]. FOLMC has accounts with Paypal and can process credit cards in office. The office also receives membership payments through the newsletter remittance form. In all of these methods, new and renewing members have the option to designate a chapter.

For these new or renewing memberships, FOLMC sends reports, along with the payout of all such designated gifts, to the chapters on a monthly basis. Timing of these reports is dependent upon the reconciliation of bank and account statements---usually done at the end of the following month (e.g., payouts for July will occur at the end of August). The payments are accompanied by contact information on each person. This is done through the interdepartmental mail system and is usually followed by an email announcing when to expect to receive the check and list.

Note: Each chapter is required to remit \$5 for every membership made through the FOLMC office included on the monthly reports.

FOLMC sends all members joining through the office an acknowledgement for IRS tax purposes and a membership card.

FOLMC sends newsletters, bookstore communications, and announcements of county-wide events to all members.

Recruiting Members

There are many ways in which FOL chapters can recruit new members. Experience has shown that the most effective method involves one-on-one contacts, but other techniques can work well if the circumstances are right.

One-on-one interactions can take place in a variety of settings, including:

- At FOL chapter-sponsored events.
- At community days at the library.
- At community events *not* at the library.
- In encounters between FOL chapter members and members of the public.

To increase the likelihood that the contacts will result in obtaining new members:

- Have a membership application ready.
- Provide something in writing that explains what the FOL does.
- Include small freebies—bookmarks, pencils, refrigerator magnets, etc.—if available.

See Appendix 8-B for a sample membership application and information sheet.

Another technique for recruiting members is through a mass mailing. However, one drawback of this method can be the significant front-end costs. Information on conducting a mass mailing is included in Appendix 8-C.

Maintaining Membership Records

Each chapter should maintain its own membership records. This can be done through a variety of means, such as the following:

- A computer program that can generate labels. The Chevy Chase chapter uses MyMailList, which not only records important membership information but also is an important tool for keeping in touch with members.
- A computer spread sheet, such as Excel. This will allow recording of important membership information as well as the capacity to sort the membership database. Also, it is not difficult to create and print mailing labels from an Excel address list.
- Such other electronic software as Word. Using the Mail Merge feature should enable the chapter to use the list for mailings.

It is very important, no matter what type of membership list is used, to regularly perform back-ups. FOLMC also maintains a record of membership, and (if necessary) chapters can contact the office for lost information or help in updating their membership lists.

Keeping in Touch with Members

Many chapters prepare and send newsletters to their members. (See the “Newsletters” section of this Handbook for more details.) Some chapters maintain member email lists and send out announcements and/or newsletters electronically. This is a very cost-effective technique, but the email list should be kept up-to-date. Additionally, some members may not wish to receive frequent messages.

Retaining Members

Many chapters may find that it is easier to get new members than to keep them. This is a problem common not only for FOL chapters but all nonprofit organizations. Many people may view their membership contributions as one-time gifts. So how can chapters maximize their ability to retain members? The key is targeted communication.

Use the chapter’s communications media—newsletters, emails, etc.—to remind members that their continued support is essential to the health of the library system. Consider including membership expiration dates on newsletter mailing labels, and in each issue inform members how they can renew their memberships.

Think about “investing” some of the chapter assets in a membership-retention process. Sending out mailings—annually, semi-annually, quarterly, or on a rolling basis—to those who have not renewed their memberships will probably bring in well more than mailings cost. By sending announcements out annually it may be possible (depending on the size of the mailing) to take advantage of the lower bulk-rate prices available to non-profits.

Getting Volunteers for Library and Chapter Needs

Chapters always need volunteers, and the need is increasing as many library programs previously run by library staff must now be volunteer-led if they are to take place at all. The key to getting volunteers is to put out the word well in advance of the need and to be specific about the need. Be specific as to when volunteers are needed and what they are needed to do. It is much more effective to be specific when requesting volunteers, for example:

“We need you on Thursday, October x, from 6 to 6:30 p.m. to help set up our meeting room for an author talk.”

Vs.

“We need volunteers to help with FOL-sponsored programs.”

Retaining Volunteers

The best of the “best practices” techniques for retaining volunteers is to recognize their services. Almost everyone likes to be thanked for a job well done. This can be accomplished in a variety of ways. Recognition in the chapter’s communications with its membership is one way. Another is to have low-budget events specifically to recognize volunteer contributions. There is nothing wrong with having, and spending chapter money on, an occasional event to which only those members who have rendered services are invited.

Recruiting Officers

Officers normally will come from the membership ranks. It is generally not a good idea to recruit a non-member to be an officer because the chapter will have little information about the person’s commitment to the Friends of the Library. In order to most effectively “recruit” officers from within the ranks, the chapter should have “job descriptions” that outline the duties and responsibilities of all its officer positions.

Succession Planning

If the chapter president or treasurer announced on short notice that he or she needed to cut back on FOL involvement or even stop altogether, is there someone to take his or her place? To reduce the impact of such situations chapters should have a general officer succession plan. Consider having understudies for officer positions and/or persons who will assist the officer with the understanding that they will take over, either on an emergency basis or in the future. Also try recruiting for potential officers and officer replacements on an ongoing basis.

DATE

«preferred_constituent_name»
«additional_name»
«address1»
«address2»
«city», «state» «zip_code»

Dear «preferred_salutation»,

Thank you for your «basic_membership_level» membership (\$«last_membership_amount») with Friends of the Library, Montgomery County made on «last_gift_date». Your membership helps Montgomery County Public Libraries (MCPL) by providing enriching cultural and educational opportunities for all county residents. Per your request, your membership will be designated specifically for «chapter_affiliation».

Libraries are a critical component of our community's future. Adapting and evolving to meet the changing needs of those who count on it, MCPL has served everyone from avid readers to job-seekers to students with free and accessible services. Your membership directly supports the over 600,000 library card holding, Montgomery County residents who count on MCPL by providing:

- **Free and low-cost programming** for children and adults alike
- **New technology and devices** to help MCPL broaden services for all County residents
- **Library amenities** such as cozy seating to make library visits a pleasure, and garden plantings to create inviting spaces for library patrons.

Your membership card entitles you to 10% off at our 3 Friends' Bookstores. This is just one of the benefits you enjoy as a Friend. Other benefits include:

- **Advance notice** of sales at our 3 used bookstores
- **Complimentary subscription** to *Friends*, our quarterly newsletter
- **Invitations** to special events featuring local, notable authors across the county.

Please retain this letter as your receipt for tax purposes. In compliance with IRS regulations, Friends of the Library certifies that no substantial goods or services were received in exchange for your membership dues or contributions. Our tax identification number is 52-1283371.

We appreciate your ongoing support of our efforts to enhance our public libraries. Thank you again for your generous support.

Sincerely,

Ari Z. Brooks, MSW
Executive Director



**Support Reading
All Year Long
at the Chevy Chase Library.
Join the Friends of the Library!**

Yes! I'd like to help the Chevy Chase Library!



Name _____

Address _____

City, State, Zip _____

E-mail: _____

By Becoming a Member of the Friends of the Library

Enhance where Chevy Chase reads through the Friends' purchases, programs and promotion. Support your community!

\$50 Patron/\$25 Family/\$15 Individual (annual membership rates)

By Helping the Library Even More Financially

Choose your own amount to give above and beyond your membership.

Amount:\$_____

By Getting More Involved with the Library

Please contact me about getting more involved in the Friends and/or the Library Advisory Committee!

Please send to: **Friends of the Library, Chevy Chase Chapter**

8005 Connecticut Avenue, Chevy Chase, MD 20815

For more info contact FOLChevyChase@aol.com

The Friends of the Library is a 501(c) 3 organization; contributions are tax-deductible to the extent allowed by law.



8005 Connecticut Avenue Chevy Chase, MD 20815-5935 240-773-9590

HOW DO YOU BENEFIT FROM A FRIENDS OF THE LIBRARY MEMBERSHIP?

Your membership in the Friends of the Library, Chevy Chase Chapter (FOLCC) entitles you to newsletters and announcements from the Chapter.

And by joining the FOLCC, you automatically become a member of the Friends of the Library, Montgomery County (FOLMC), thus entitling you a quarterly newsletter from the FOLMC that contains announcements about upcoming library and literary events.

You receive discounts for events such as the FOLMC's annual Literary Luncheon series at Strathmore Hall, and for purchases of used books at the FOLMC's two stores, at the Wheaton Library and in the Randolph Hills Shopping Center.

And your membership in the FOL is entirely tax-deductible.

HOW DOES THE CHEVY CHASE COMMUNITY LIBRARY BENEFIT FROM FRIENDS OF THE LIBRARY MEMBERSHIPS?

The FOLCC exists to support the Chevy Chase Community Library.

In the past few years, it has paid for:

- Summer Reading -- a series of programs and activities, with attendance running up to capacity (150 children for a single event!)
- Family Fun Day
- Chinese New Year Celebration
- Equipment purchases, including an AV/DVD projection system, bookcases for paperbacks and over-sized books, a die-cut machine, a laminator, and wall-mounted folders.
- Recognition for the Library's wonderful staff, including a holiday luncheon, Library Lovers' Month gifts, and purchase of a microwave and toaster oven for their use.

Without the FOLCC's financial support, it would not have been possible for the Library to have conducted those programs, purchased that equipment, and recognized staff in those ways.

**Friends of the Library, Chevy Chase Chapter
Direct Mail Campaigns
January – March 2007
January – March 2008**

GOALS

Based on the success of the Little Falls Chapter's recent campaign, the Chevy Chase Chapter conducted a direct mail campaign in conjunction with Library Lovers Month activities. Our goals were to:

- Inform the community about Library Lovers Month activities, the Library itself and the Friends of the Library
- Collect enough in membership dues and contributions to cover the cost of the mailing
- Gain new members for future participation and renewal

After our first campaign in 2007, we decided to do a second the following year.

The following information about our campaign is provided in the hope that other chapters considering direct mail campaigns don't have to re-invent the wheel.

AUDIENCE

Your natural audience consists of those who live within the "boundaries" your library serves. The Little Falls Chapter informed us about their mailing in case one of "our" people got a Little Falls solicitation. We let the Bethesda Chapter know the same thing when we did ours.

We used InfoUSA for our leads. Based on the Little Falls Chapter's experience and our budget, we wanted to mail to between 5,000 and 6,000 addresses. With InfoUSA, there was a price break at 5,000.

Our audience was within our zip code (20815). There were well in excess of 10,000 addresses in the zip code. In order to get the number of addresses down to fit our price range, we used the following additional criteria: (1) Chevy Chase only, eliminating those in 20815 whose address is Bethesda; (2) within 1.2 miles of the Library; (3) single-family dwelling units only; (4) owner-occupied units only; (5) persons 25 and over; (6) households with incomes of \$60,000 or more; (7) estimated home values of \$400,000 or more; and (8) no P.O. box addresses. This gave us a count of 5,537 addresses.

When we did our second mailing in 2008, we included those addresses that met the 2007 criteria for which there had been a change in addressees as well as addresses

more than 1.2 miles from the Library and multiple-family dwelling units (including all apartment buildings).

We ordered pressure-sensitive labels rather than an electronic file. This was primarily because, with a short time frame, we did not feel we had the resources to print labels from an Excel file ourselves or to farm the work out. If we had a longer time frame, we would probably have opted for receiving an electronic file, because it would have given us more information and we would have been able to use the list as many times as we wanted.

DIRECT MAILING CONTENTS

We did our mailing in conjunction with Library Lovers Month because we had a variety of special events that month to promote and we thought there would be less competition for donations than at the end of the year. The Little Falls Chapter did its mass mailing at the end of the year and got a better return, perhaps because the timing.

Our mailing consisted of:

- Mailing envelope (#10). We used pink envelopes in line with our Library Lovers Month theme and because they would stand out better. We used the Friends of the Library, Montgomery County bulk mail permit number.
- Letter and calendar of events. We did a double-sided sheet in black ink on white paper with our membership solicitation letter on one side and a calendar of Library Lovers Month events on the other. We included an e-mail address for people to contact if they had questions.
- Reply envelope. This envelope was white. It had places to be checked for different levels of membership and also if the respondent wanted to be more involved with the FOL

When the Rockville Chapter does a mass mailing, it uses a white #10 envelope to mail to potential members and a blue #9 envelope folded inside with the chapter's address as the return envelope. The reason the chapter uses the blue envelopes is that when they are returned the letter carrier knows without reading the address that they belong to the chapter, the mail for which goes to the first floor of the Rockville Library building rather than to the third floor where the County FOL offices are located. Having blue envelopes also makes it easy for the chapter treasurer to spot the mail and that there contains money.

PRINTING

We had 5,600 of each item printed.

We used Altogether Printing in Bethesda, in large part because they had done the printing for the Little Falls Chapter's mass mailing and because we had a short time frame in which to pull the mailing together. With longer lead time, other chapters may want to explore whether they can get better prices elsewhere or even whether it might be more cost-effective to use different firms for different items.

We provided camera-ready copies. Many firms now prefer to work from electronic files (e.g., PDF, JPEG). It took four business days to have the printing done.

MATERIALS PREPARATION

Ivymount School stuffed the envelopes and affixed the mailing labels at no cost. (We later provided snacks for the students who had participated in the work.) We had Altogether Printing fold our letter but Ivymount would have done that if requested.

We dropped the materials off at the school, together with postal mailing trays, and explained to a staff member how we wanted the materials assembled. We were able to pick up the completed materials six days later.

MAILING

As mentioned above, we used the Friends of the Library, Montgomery County's bulk mail permit number, making the cost of the mailing much lower than it would have been had we sent the material out first class.

One note of caution: By sending the mailing by bulk mail, we made the timing of delivery less predictable. First class mail is most often delivered the day after it is posted or the day after that. Bulk mail is sometimes delivered that quickly, but it may take a week or even more, depending on local post office mail volume and other factors.

Before delivering the mailing materials to Ivymount School, we picked up 12 flat trays from our local post office and brought them to the school with the materials.

In order to use the bulk mail permit number, the envelopes must be delivered to the Bulk Mail Unit at the Gaithersburg Post Office on Shady Grove Road. You must file out a form at the post office and provide a sample piece of mail. You must know the number of pieces to be mailed.

There must be sufficient funds in the FOL account to cover the cost of the mailing. If there is not, the best method is to have the Bulk Mail Unit calculate the cost, then go to the post office itself (on the other side of the building) and pay for it by check or cash. You will be given a receipt that you then take back to the Bulk Mail Unit as verification

that there are sufficient funds in the account. (If an individual chapter representative writes the check from his or her personal account, he or she will have to ask the chapter treasurer for reimbursement.)

COST

Our first mailing cost 47 cents per piece. This includes the cost of labels from InfoUSA, the printing costs and the bulk rate mailing costs.

RETURN

Within a month of the first mailing, we received 97 new memberships, 6 membership renewals (remember that we did not screen out current members) and 2 contributions below membership levels. At that point, the response rate was 1.9% and the average contribution was \$34. We continued to receive responses for many months after the mailing.

What we received in the first month exceeded our costs by almost \$500 even after we subtracted the \$5 FOLMC fee from each membership. However, the Little Falls Chapter had far greater success, its net receipts totaling in the neighborhood of \$7,000. The Little Falls return rate was over 3% with a considerably higher average contribution than what we received.

Our second mass mailing campaign was less successful but we still netted more than we spent.

THANK YOU LETTERS

We send thank you letters to all those who responded with new memberships, membership renewals or contributions with our standard letter that indicates the amount of the contribution and invites the recipient to our next chapter meeting. The cost of these letters was simply the cost of first class postage.

CONCLUSION

For us, the direct mail projects were very successful. We promoted Library Lovers Month and the Library and increased our membership, by more than 65% with our first campaign and by a significant amount with our second. By increasing our membership, we obtained a larger base for participation in FOL activities and strengthened our financial position not just for the short term but for the longer term as it gave us more potential membership renewals.