Elevation Membership Intake/Recruitment & New Member Retention Assessment Template

Chapter:

Date:

This document is intended to be used as a template for chapters completing their priority plan assessments. It provides guidance for reflection that allows for goal setting (useful in the next step of Elevation: action plans) and addresses expectations outlined in the Elevation program.

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| Priority Area Five: Membership Intake/Recruitment & New Member Education |
| What went well in the previous year in our membership intake or recruitment/new member education process? | The process of recruiting/identifying new members to start an intake or new member education process: |
| The process of educating members in an intake or new member education process: |
| What needs improvement based on the previous year in our membership intake or recruitment/new member education process? | The process of recruiting/identifying new members to start an intake or new member education process: |
| The process of educating members in an intake or new member education process: |
| What are the greatest opportunities that exist for our chapter connected to identifying and mobilizing interest in the organization? |  |
| What was the number of new members brought in to the organization in the previous semester/year? | *[Include number here]* | *[points for reflection: Is this a good number for us? Do we have a goal for the future? Does this allow our organization to remain sustainable?]* |
| What was the chapter’s new member retention rate last semester/year? | *[include number here]* | *[points for reflection points: Is this a good number for us? Do we have a different goal for the future? What has traditionally impacted our ability to retain people going through our intake or new member education process?]* |
| Does my chapter understand and provide education about the hazing policy and how we can effectively bring in new members? |  |
| What membership intake or recruitment/new member education expectations do others have for our chapter? | *[points for reflection: Does our (inter)national organization or governing council have expectations for the intake or recruitment and education process? This might include submitted paperwork or goals for a number of new members that need to be brought in to the organization.]* |
| What is missing from our chapter’s intake or new member education program? | *[Remember, an intake or new member education program should provide information about the organization’s history and values in addition to organization expectations, academic support, campus resources, and mentorship opportunities]* |
| Based on this reflection, goals for our chapter in this priority area include: | 1. *[state goal here]*
2. *[state goal here]*
3. *[state goal here]*
4. *[state goal here]*
5. *[state goal here]*

 *[Ideally, there are at least 4-5 goals identified for each priority area that emerge after conducting this assessment based on what went well and areas of growth. What needs to continue happening? What gaps need to be filled? What can be newly implemented? These goals will be further explored in action plans where you will be expected to include more specifics about each goal, including how you will accomplish the goal and by when it will be completed]* |