

Do it yourself

Considerations for devising a membership scheme from *The Complete Membership Handbook*

Devising a membership scheme

The design of a membership scheme has a fundamental impact on what it can achieve and how effectively it can achieve this. A number of vital foundation stones must be put in place when a scheme is first set up in order for it to thrive in the longer term. The overall objectives for the scheme must be identified; a structure through which the scheme is managed must be set up; and a range of benefits and an associated fee structure (in most cases) or other qualifying joining criteria must be devised to attract members.

The initial design of a membership scheme is critical to its long-term impact and fundamental issues such as the basic structure of the scheme, its relationship with the organisation and its objectives should be established at the outset.

Checklist for setting up a scheme

- What are you trying to achieve?
- Is there evidence of a need?
- Are your aims narrow or wide; and will you know when you have achieved your aims, or will your aims be on-going and long-term? For example, are you trying to achieve something for the greater good of society; the support of particular groups of disadvantaged or afflicted people; advance, defend or protest at something; or form a social group of like-minded people?
- Is there any other way of achieving your aims?
- Are there others out there who are already undertaking the same work, and if so, should you join in with them? Could you volunteer your services?
- If not, what will be different or unique about your aims, or the way in which you will achieve them?
- What support and resources do you have around you (people, money, professional expertise)?
- Do you believe that by formalising together in a group, you may attract more people, money and professional expertise?

If you get to this point and you want to continue ...

- Is there a need to formalise into a group? If yes, what form of structure do you need / desire? Legal and financial advice should generally be taken before a final decision is taken, but consider for example,

issues such as the likely scale of the 'organisation'; the potential levels of income and expenditure; is there a need to fundraise from the public? Are there opportunities for grant funding from public bodies and if so, do those bodies have a view on what type of structure they will consider funding? (It is often the case that groups start off as unincorporated associations before progressing organically towards a more formalised structure such as incorporation and/or charitable status).

- Having decided upon the structure of the organisation, together with your 'provisional committee' members you will need to develop a governing document that will lay out the legal identity of the organisation and a framework for its future operation. This may be a Constitution (for an unincorporated association), a Deed of Trust (for a charitable trust) or a Memorandum and Articles of Association (for a limited company). In most instances you will require legal assistance for this stage, but you can do a lot of the ground work first by considering the earlier questions: what are you trying to achieve and how; what resources will you require; what people you are setting up to serve; what sorts of people you need to assist you; whether you will need to apply for funding; are you likely to need to employ staff eventually, buy or rent premises, and so on. Until this work is completed, you will not be able to set up bank accounts, apply for funding or undertake contracts.
- You have assembled the provisional committee and are now armed with a constitution, so you can proceed to organise banking facilities, apply for funding and start the process of delivering your aims. Do you have all the people you need to start? Do you have a plan for the first one, two and three years? Where will you be based? How will you tell people about your new organisation? How can people join? How can people access your services? Answers to these and many more questions should form the basis of a written development plan. Careful refinement of this plan will ensure that the tasks are located in the right order of priority and chronology, and will help to identify any gaps that still remain before you begin work. This plan, or an abbreviated version of it, may well be required by any potential funder, and a less



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detailed version of it may help you to attract both volunteers and beneficiaries to your new organisation.

- Use the plan to allocate responsibilities between you and your colleagues, according to the technical skills and interests you each have. It is important at this stage to ensure that no one person is left with the lion's share of the work, and also that communication between you is good enough so that if someone moves on, or becomes unavailable for periods of time, others can take over the extra workload without the organisation failing in its infancy. If the workload is still too great, or if gaps in skills and knowledge have been identified, work with your colleagues to find, coerce and enthuse additional individuals to your cause.
- Make sure your committee regularly meets – at least as often as your governing document requires – and continually review progress throughout the year.
- Your first Annual General Meeting should be a cause for celebration of your achievements – after all, you have survived the first twelve months, and will by now hopefully be looking at how to develop your fledgling organisation into a long-term success.

This checklist is an extremely brief synopsis of what may be a typical route from an idea through to creation of an organisation to deliver that idea. There are numerous excellent publications which look at this process in considerable detail, including *The Voluntary Legal Sector Handbook*, Adirondack, S and Sinclair Taylor, J, Directory of Social Change (2001) ●



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