

# Society of Women Engineers 1998 Membership Manual

## ***A Handbook on Membership Retention and Recruitment***



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**“The Society of Women Engineers stimulates women to achieve full potential in careers as engineers and leaders, expands the image of the engineering profession as a positive force in improving the quality of life, and demonstrates the value of diversity.” ~ *Mission statement***

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# I. Introduction

This manual is intended to assist Membership Chairs/Committees and Sections in building, running and/or expanding Sections' membership programs. It provides an overview of what a Section Membership Chair needs to know to perform the job effectively, plus ideas for Sections on membership recruiting, retaining, and increasing member participation. The term "Section" is used throughout the text, as Section activities generally do not refer to the Members-at-Large (MALs). While the MALs may be able to adapt some of these materials for their membership activities, every Section Membership Chair should be aware that the Society has many members who are not in Sections. Student Sections are encouraged to utilize this manual, and to provide feedback on its usefulness.

All organizations face the challenge of attracting new members and retaining current members. We, as members of SWE, need to promote our organization, encourage the active participation of our members, and sustain their interest.

The Society of Women Engineers' Membership Committee feels that membership is an important aspect of SWE and deserves its own operator's manual. This manual has been specifically organized to facilitate a Section's membership program and give guidance to Membership Chairs/Committees. As a consequence, the reader will undoubtedly see information found in other SWE literature repeated here.

This manual is divided into the following sections:

- I. Introduction
- II. SWE Membership
- III. Membership Basics
- IV. Expanded Membership Program

Each section contains explanations of the topics, applicable SWE policy and requirements, references and resources, followed by examples of successful program ideas implemented by SWE Sections throughout the country.

You are welcome to send any suggestions or additions to this manual to the Society of Women Engineers Membership Committee, c/o Society of Women Engineers, 120 Wall Street, 11th Floor, New York, New York, 10005-3902. You may also contact SWE Headquarters for Society of Women Engineers' Membership Committee contact names or locate them on SWE's Web page.

- \* Telephone Number: 212/509-9577
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- \* Web Home Page: <http://www.swe.org>

As chair or member of your Section's Membership Committee, you should become familiar with the information in this manual. Parts of general membership information can also be found in the Member Guidebook, various Society pamphlets, the Section Manual, and SWE Articles of Incorporation and Bylaws.

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## II. SWE Membership

### A. *Membership Benefits*

Members join and remain in an organization because they receive or perceive benefits from their membership. It is important to understand what benefits SWE provides its members, nationally and locally. SWE is a unique organization and few other organizations provide the wide range of programs, personal growth opportunities, and diverse membership provided by SWE. As a Section Membership Chair, you must remember that people have different reasons for being members. Some benefits are tangible, others are intangible.

The Society of Women Engineers is a non-profit, educational, service organization. The mission of the organization is to stimulate women to achieve full potential in careers as engineers and leaders, expand the image of the engineering profession as a positive force in improving the quality of life, and demonstrate the value of diversity.

### **Programs**

SWE members provide services to students by providing role models and by demonstrating the technical contributions that women have made and continue to make to society. SWE sponsors various leadership conferences and an annual Conference at which a variety of technical, management, and SWE specific topics are presented. These activities are generally open to both SWE and non-SWE members. These forums or programs provide a means of focusing resources to obtain career guidance, continuing development, management and leadership training, along with multi-industry contacts.

### **Personal Development**

SWE provides its members with the opportunity to grow and develop in many areas through professional and technical meetings, joint meetings with other technical societies, technical tours, and social activities. SWE also offers opportunities for members to learn and practice management and organizational techniques and develop leadership skills. This experience can be gained through committee work and/or serving as an officer at the local, regional, and national levels.

### **Fellowship**

SWE provides a sense of fellowship for its members. This network of professionals and students leads to contacts with SWE members and others who are able to provide assistance with work matters as well as help members achieve personal goals. The Society's magazine, SWE, provides a means of sharing technical and professional information through its articles and provides information on employment opportunities through advertisements by prospective employers. Every Section Membership Chair should remember that about 7% of SWE's voting members are Members-at-Large who are not affiliated with a Section.

## Benefits

SWE membership includes the following benefits:

- SWE, the magazine of the Society of Women Engineers, a bi-monthly publication
- Registration discounts at the annual Society of Women Engineers' National Conference
- Registration discounts to the annual regional conferences
- Opportunities for networking with fellow professionals
- Opportunities for leadership training and team building
- Affiliation with a SWE Section or the Members-at-Large
- Access to SWE Publications (See Attachment A)
- Access to SWE Library/Videos (See Attachment B)
- Access to SWE Merchandise (See Attachment C)
- Free listing in the SWE Resume Database (See Attachment D)
- Heightened awareness of women's issues in engineering
- Access to information on women in engineering through SWE archives, publications, reports and surveys
- Awards and recognition for accomplishments in the Society and the engineering profession
- Scholarships (Contact SWE Headquarters or SWE's Web Page for a listing of current scholarships)
- Access to the Society of Women Engineers Credit Card sponsored by MBNA Bank
- Opportunities to serve as role models
- Ability to make a difference through career guidance activities
- Access to a SWE maintained job listing

The Section is an important vehicle for member participation in SWE. Sections provide benefits to their membership at a local level. Section affiliation is normally included with SWE memberships except where there are no sections -see Members-At-Large benefits.

### Benefits with local Sections include:

- Section newsletter
- Monthly meetings/tours on technical and professional development topics. Some SWE programs offer reduced rates for SWE members.
- Opportunities to serve in the community by interfacing with local schools, colleges and other organizations (e.g. Girl Scouts) as role models, mentors and counselors
- Local employment opportunities (job bank)
- Sense of fellowship with its members
- Career development opportunities through local leadership, conferences and seminars
- Special local programs/activities developed by the Section for the benefit of the members and the community
- Awards and recognition for accomplishments
- Scholarships

**Benefits for Members -A-Large (MAL) include:**

- SWE affiliation without assignment to a specific Section as a result of geographic area or member preference
- Leadership opportunities as a MAL Rep, Officer, President, or Treasurer
- MAL NEWS, a bi-monthly publication

***B. Membership Grades***

There are seven grades of membership in the Society open to individuals: Student, Affiliate, Associate, Member, Senior Member, Fellow, and Honorary. Members are urged to upgrade to the next level as soon as they qualify. Section III provides ideas regarding student upgrades.

As a member of the Society, you are also a member at the same grade in one of the Society's Regions and in either a Section, Student Section or as a Member-at-Large (MAL). Assignments to a Region and Section or MAL are based on zip code boundaries. Student assignments are made to the school the student attends. Any member may request, in writing to SWE Headquarters, assignment to a different Section, Student Section, or MAL region. Region membership is determined by the location of the Section, Student Section or MAL region. Zip code boundaries are determined and periodically reviewed by the Society of Women Engineer's Membership Committee. Regional boundaries are determined by the CSR. A SWE Region Map and zip code lists are provided in Attachment E.

The SWE Articles of Incorporation and Bylaws specifically spell out the eligibility requirements for membership and membership grade. Membership grade requirements are based upon education and work experience. Final assignment of a membership grade is made by the Admissions Committee. Questions may be referred to your local Section officers, the Membership Committee, or to SWE Headquarters. The member's grade is reflected on the membership listings received by the Section President from Headquarters. A member's grade is the letter(s) designator in front of the membership number. The first two digits in a membership number generally reflect the year a member joined SWE.

**Member Grades**

SWE's Bylaws detail the member grade categories and requirements. Excerpts from the current Bylaws are described below.

**a. Member (M)**

Any person who is or has been actively engaged in engineering work is eligible to become a member if, at the time of application for admission or advancement, she/he qualifies under one of the following classifications:

1. Holds a baccalaureate or advanced degree in engineering or engineering technology from a recognized college or university.
2. Holds a baccalaureate or advanced degree in a science related to engineering from a

- recognized college or university and has at least two years of engineering experience indicating engineering competency and achievement.
3. Has at least five years engineering experience indicating engineering competency and achievement.

b. Senior Members (S)

Any person who is or has been actively engaged in the profession of engineering is eligible to become a Senior Member if, at the time of application for admission or advancement, she/he qualifies under one of the following classifications:

1. Holds a degree in a science related to engineering from a recognized college or university and has at least eight years of increasingly important engineering experience.
2. Holds a degree in a science related to engineering from a recognized college or university and has at least eight years of increasingly important engineering experience.
3. Has at least 11 years of increasingly important engineering experience indicating engineering competency and achievement.
4. Anyone who receives the SWE Achievement Award is automatically made a Senior Member. A fellow of the Society who has received the SWE Achievement Award shall retain the Fellow grade.

c. Fellow (F)

A person who has been a Senior Member of SWE at least eight years or a member of SWE for at least twenty years may be chosen a Fellow of the Society in recognition of her/his continuous service to the advancement of women in the engineering profession.

d. Honorary (H)

Any person who has achieved recognition as outstanding in the field of engineering or any person who has made a significant contribution of service to the Society may be elected Honorary member by a unanimous vote of ballots cast by the Council of Section Representatives (CSRs), provided a quorum has voted.

e. Associate (A)

Any person who does not qualify as a member, Senior member or Fellow is eligible for the grade of Associate if:

1. She/he is engaged in work related to the practice of, or training for, engineering.
2. He was a past member of the Men's Auxiliary Society of Women Engineers prior to June 30, 1976, and does not otherwise meet the requirements for SWE membership.

f. Affiliate (B)

Any person who supports the goals of the Society and does not qualify for one of the other membership grades qualifies for the grade of Affiliate. Applicants must be sponsored by a Section President, CSR member or Regional Director.

#### g. Student Member (T)

Any person who meets one of the following requirements is eligible for the grade of Student member if such a person is not full-time in an engineering position or a field related to engineering and:

1. Is pursuing an undergraduate course of study towards an associate or a baccalaureate degree in engineering, engineering technology, or a field related to engineering in a recognized college.
2. Is pursuing a full-time graduate course of study in engineering or a field related to engineering in a recognized college or university.

### ***C. Corporate Membership***

Corporate membership in the Society is available to any organization that supports SWE's objectives and goals. An organization alone can apply for corporate membership or an organization can apply for corporate membership and sponsor up to five of its employees as individual members of the Society, provided they apply and are admitted. (Note: Except in the case of life members, if a Corporate sponsored member has already paid their dues, SWE will reimburse that employee for the amount they paid in that fiscal year.) Corporate sponsored members are designated by a "C" in front of their membership number. Information about corporate memberships can be obtained from SWE Headquarters. Attachment F also provides additional information.

### ***D. Life Membership***

Life Membership in the Society of Women Engineers is available to any person qualified for membership. Contracts detailing the method of payment may be obtained from SWE Headquarters. Members continue to pay annual dues as billed until such time when the contract has been paid in full. Once a member pays their contract in full, they receive an "L" in front of their membership number. (Achievement Award Recipients receive the "L " member code designation.)

1. Reasons for Becoming a Life Member:
  - a. It's a good personal investment
    - Life membership in SWE carries prestige. Even if an individual changes profession, she will always be recognized as an engineer.
    - Once a life membership contract is fulfilled, SWE membership is free. Life members are not billed annual dues. Consult your tax consultant since the Life membership fee may be a tax deduction.
    - With no yearly dues, annual giving may be focused on such things as scholarships or special projects.

- Life members have the satisfaction of knowing that their influence will live on and help other women engineers long after they are able to help directly.
- b. It's an investment that brings benefits to the Society.
- Life memberships annually generate more income for SWE than would be derived from an individual's annual dues.
  - As the principal of the SWE Headquarters Fund remains intact, and annual interest is used to further SWE's goals, Life memberships continue to support the Society.
  - Income from Life memberships is predictable, which provides stability for the Society.
2. Members wishing to become Life Members in SWE should:
- a. Obtain two copies of the contract form from SWE Headquarters. Attachment G shows a copy of a Life Membership contract form.
  - b. Fill in the contract forms completely; indicating the method of payment desired.
  - c. Return to SWE Headquarters two signed copies of the contract, together with a check (stock certificates, etc.) made payable to the SWE Headquarters Fund. The SWE Headquarters Fund has a 501(c)(3) IRS tax exemption. If you have any questions, check with your accountant on the deductibility of your contribution under the tax laws.
  - d. A signed copy of the contract indicating its receipt will be returned to the member by SWE Headquarters. The check (or stock certificate) will be forwarded to the Board of Trustees.
    - If full payment has been made, membership status will be changed to Life member and a Life membership card and pin is prepared and transmitted to the member along with her/his copy of the contract.
    - If partial payment has been received, Headquarters places the contract in a pending file for a reminder to be sent to the SWE member thirty days in advance of the next payment due date. No change is made in the membership status until full payment has been made. Upon receipt of final payment the member's status is changed to Life member.

A Life membership makes a gift that provides a lifetime of professional benefits to the recipient and supports the Society's activities and programs.

## ***E. Member Responsibilities***

As a member, Senior Member, or Fellow, you are a voting member of the Society. Student members vote in their Student Sections only. Student members who are Student Representatives to the Council of Section Representatives have voting privileges in that body.

Contact with your local Section or student Section's officers will provide opportunities to become more actively involved in local SWE activities. Local Sections have committees, programs, and numerous possibilities for a member's involvement, whether your time commitment and interest is small or large. SWE involvement at the local or Society of Women Engineers level encourages leadership growth, networking opportunities, and organizational abilities. SWE is an organization as a result of its members' commitment and willingness to get involved.

## ***F. Dues***

The Council of Section Representatives (CSR) sets the dues and fees for the Society. Certain individuals may qualify for reduced dues. Dues are at the following rates.

1. Annual dues are \$75.00
2. You may qualify for a 50% (\$37.50) reduced dues status if you are unemployed, retired, or submitting membership application after January 1 of the fiscal year.
3. Upgrading as a Student Member to a SWE membership is applicable to those who have graduated within the previous 12 months. Dues are \$25.00.

There is also a \$20.00 application/reinstatement non-refundable fee for each membership application. This application fee does not apply to Student Member Upgrades. For those who attend the Annual Conference at the non-member rate, this application fee is waived.

For the period January 1st to June 30th, dues are prorated 50%. Student membership, student upgrades, and corporate sponsored member dues are not prorated.

Contact your local SWE Section or SWE Headquarters or SWE's Web Home Page for applications and current rates. The fiscal year for the Society is July 1 to June 30. Annual dues expire June 30. Dues renewal notices are mailed to members in May. Failure of a member to pay applicable dues by December 1st will result in forfeiture of membership. In order to reinstate, a member must provide appropriate application with accompanying dues and applicable fees.

A common bill and application will serve both students and members for membership applications, upgrades, and dues renewals.

The Council of Section Representatives has established that 2% of the dues collected will be rebated to the Regions and that 20% of the dues collected will be rebated to the Sections and Members-at-Large.

There shall be no "local" dues assessed by any of these SWE groups.

Dues rebates may be spent at the discretion of the Regions, Sections, Student Sections, and MALs.

Rebates will be paid after a financial report is received by the Society Treasurer, due within 30 days of the close of the fiscal year (i.e. due by July 30). Rebates will not be paid to Sections whose financial reports are not received by the Society Treasurer by the end of the following fiscal year (i.e. June 30). Rebates are paid twice a year.

### ***G. Membership Committee***

The Society of Women Engineers' Membership Committee was formed in 1992 to assist the Board of Directors and SWE Headquarters Staff in recruiting and retaining members. The Society of Women Engineers, Membership Committee is comprised of one Regional Membership Coordinator from each region, the Members-at-Large President, and special committee chairs: Guidebook, Membership Manual, Zip Code, International Membership, New Section, Membership Campaign, Membership Awards, and Student Upgrades.

This committee assists and leads in the promotion of member benefits, works with Regions, Sections, and Members-at-Large to disseminate information, coordinates the annual membership campaign, and produces membership related documents.

### ***H. Headquarters***

The Membership Supervisor at SWE Headquarters is responsible for: processing membership and corporate membership applications, recruiting, recommending an applicant's eligibility and SWE membership grade, notifying assigned or selected member's local Section or Members-at-Large President of application approval, addressing membership questions and resolving discrepancies, providing paid and unpaid members' lists to local Sections for additional Section follow-up, and providing membership statistics to the organization.

### ***I. Membership Policy and Interpretation***

As defined in the Society Bylaws, the Council of Section Representatives is responsible for establishing policy, while the Board of Directors (formerly Executive Committee) is responsible for interpreting and implementing these policies. Policy and interpretation (P&I) are written interpretations of the bylaws or of customs and practices of the Society. P&I is maintained in two forms by the Society -Current and Historical. Historical P&I includes those items that have been superseded by later Policy and Interpretations by the Board of Directors, CSR, or Membership.

The current P&I document is updated by the Secretary and copies of marked up pages sent to the Board of Directors with the minutes of each meeting so that the Board of Directors can assure that all needed items have been incorporated. A formal, approved revision will be issued by the Secretary each year, not later than November 15, containing the previous fiscal year's Policies and Interpretations. It is each holder's responsibility to ensure that the annual addendum has been received and that such addenda are attached to the current revision and transferred with other files to her/his successor. A copy of the current policy will be issued to and maintained in the current files of the Board of Directors, Council of Section Representatives, Executive Director and Committee Chairs. A copy will be sent to each Section President as an appendix to the Section Manual.

Attachment H contains excerpts from the current P&I that are relevant to membership. Not all P&I relevant to membership are included here, only those items from commonly asked questions. Concerns or questions regarding the portions from P&I may be referred to the Membership Committee Chair or SWE Headquarters.

## ***J. Logo***

Membership communications including the SWE logo must respect official logo requirements. Contact SWE Headquarters for logo requirements, logo on disk or logos for reproduction. Attachment I provides information regarding SWE logo guidelines.

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## **III. Membership Basics**

This Section covers the basics for a successful membership program.

### ***A. Key elements to a Membership Program***

Growth in membership is important, however turning members into active participants is also important for a successful Section. Because SWE Sections are diverse in member numbers, geographical size, industries where members work, and in the types of communities we serve, the details of a membership program will vary .

There are five key elements to achieve a successful membership program. They include 1) new member orientation, 2) membership recruitment, 3) membership records, 4) membership processing, and 5) membership renewal and retention. These elements are described in detail in the following sections. Some of the listed activities serve dual roles and all ideas should be evaluated in relation to your Section, its goals, its membership, demographics and diversity, and Section's membership strengths and areas of concentration.

### ***B. Roles and Responsibilities***

Roles and responsibilities of the Membership Chair, Membership Committee Members, Section Officers, other committee chairs, and the membership of your Section are identified below.

#### **a. The Membership Chair**

The Membership Committee's responsibilities are usually defined in the Section Bylaws.

Membership is a standing committee, which means that it is a permanent committee. The chair is either recruited by the Section's officers or volunteers for the position. Generally, the chair is considered part of the Section's Executive Council. Most Sections have some sort of planning exercise during the summer for the upcoming year of activities. This is an excellent time for the Membership Chair to formulate a membership program plan and to ask/recruit volunteers for the committee.

#### **b. Membership Committees**

Throughout this manual we refer to Membership Chairs/Committees. It is important to realize that while one person may be able to run a basic membership program, it really takes a committee to run an effective successful program. The Membership Chair has the responsibility to ask for volunteers. The responsibilities of membership can be easily divided up among several members.

#### **c. Section Officers and Other Committees**

The Membership Chair will find herself/himself working in conjunction with other Section officers and committees. The following descriptions share some of these interactions.

### 1. Section President

The Section President is the point of contact from the Section to the Society of Women Engineers. The President receives membership lists, paid-unpaid lists, rosters, new member notifications, and notifications of address changes. Encourage your President to pass a copy of these items to the Membership Chair/Committee in a timely fashion.

### 2. Council of Section Representatives (CSR)

The CSR receives board-meeting minutes, containing new or revised Policy and Interpretation (P&I). They also are kept informed of pending issues and items of interest to the members. The CSR is also responsible for submitting reports on the Section's plans and progress to the Region Director. The Membership Chair/Committee should submit to the CSR a short summary of the status of the Section's membership program for these reports.

### 3. Section Secretary/Records Chair

Some Sections have the Section Secretary responsible for maintaining a Section roster and/or directory. Other Sections have a separate Records Chair or the Membership Chair might be responsible for maintaining the roster. Close coordination is required to keep the roster up to date. The Section President is important since she/he is the person receiving member status updates from Society of Women Engineers Headquarters.

### 4. Student Counselors or Student Section Liaisons

The Section's Student Counselor(s) or Liaison(s) make and maintain contacts with the local Student Sections. This becomes important for recruiting student member upgrades and recent graduates to your Section.

### 5. Programs

The Membership Committee may want to have a program or event specifically directed at membership. This should be coordinated through or with your Programs Chair. Also, the Membership Committee may want to have a way to greet and welcome new members at all Section functions, such as a special welcoming table or new member gift.

### 6. Newsletter

The Section newsletter is the primary method of communication with members. As part of your membership program, you may want to submit a column to the newsletter. The newsletter editor will have specific due dates and probably a preferred format. Some examples of membership newsletter content may be found in Section IV, Membership Retention.

### 7. Publicity/Industrial Support Committee

This committee can help you find and recruit new members through publicity campaigns and company contacts.

### ***C. New Member Orientation***

The most critical aspect of any membership program is new member orientation. New members need to know that their Section is active and interested in them. When your Section is notified by SWE Headquarters of new members, make them feel welcome. A "Welcome to our Section" letter will let them know that their membership application has been approved by the Admissions committee. Also, provide them with local contacts if they are new in the area and notify them of upcoming Section activities. Add their names to your mailing list so that they will receive regular local publications. Some Sections provide questionnaires at this time to determine their interest in various Section activities so that new members get involved quickly. Additional ideas to encourage new memberships are highlighted below.

- a. **New Member Packet:** This locally prepared packet of information provides activities happening in the Section and introduces your officers and committees. Items recommended include a welcome letter from the Section President, list of committees, contacts, activities, calendar of events, a recent newsletter, and facts about SWE and the Section. See Attachment J for an example new member letter and an example of the new member letter sent out by SWE Headquarters.
- b. **Recognize New Members & Guests:** At your Section's check-in table at meetings, identify new members and guests with different nametags to distinguish them. These nametags could be used by existing members or a designated welcome committee to introduce your Section and welcome these new and potential new members.
- c. **Assignment to a committee:** Most people joining an organization want to get involved but do not know how or who to contact to discuss their level of interest. Be proactive and assign a new member to a committee. Be sure to have the committee chair contact the new member if they are assigned a committee or volunteer for a committee in the interest questionnaire.

### ***D. Membership Growth and Recruitment***

A basic function of the Membership Committee is to actively recruit new members. This can be accomplished in several ways. A membership campaign is a focused intensive effort and is accomplished in a variety of ways depending on the Section's goals and plan.

Recruitment differs for Sections and Student Sections. The target population for a Student Section is specifically aimed at one college or university, while a Section covers a more diverse population. In planning your Membership Program, select two or three achievable ideas to implement.

- a. **Ideas for Sections**  
*The Membership Committee would like to thank SWE Members who provided the following membership ideas.* Special thanks to Cynthia Hodges, previous Region H Membership Coordinator from Detroit for a variety of membership objectives, whether Sections or Student Sections, new member recruitment, membership retention, and/or membership growth. Numbers have been added for Membership Chair/Committee discussions as they facilitate discussion and develop a membership program and/or campaign.

- 1) Hold a "Get to Know SWE" meeting every September so that members and prospects can meet staff, board members, and other volunteers and see what your Section is doing.
- 2) Develop a top opportunity list of prospective members and make sure all officers know who is on it. Try to get "big names" in your area.
- 3) Use free trial subscriptions to your newsletter as a membership campaign.
- 4) Invest in a high quality, attractive booth and exhibit at conferences and career fairs.
- 5) Develop a multimedia kiosk for use as a member "Hall of Fame."
- 6) Establish a hotline for Section information.
- 7) Develop road shows where selected Section speakers and materials are presented to other cities to support members or solicit prospects.
- 8) Include membership literature with all non-member speaker gifts. Consider a gift membership for appropriate speakers.
- 9) Include membership related responsibilities in every Section officer and committee chairs' strategic plan.
- 10) Offer to pay membership dues each year for the person who sponsors the most new members.
- 11) Develop membership recruitment contests in which all members can participate.
- 12) Get To Know the Staff at Society of Women Engineers Headquarters and what they can do for your membership program.
- 13) Conduct a full member survey every year Publish informal surveys in your local SWE Section magazine or newsletter.
- 14) Use your voice mail, fax, hotline, or electronic bulletin board to collect informal surveys and other feedback.
- 15) Conduct exit interviews with non-renewing members. Survey nonmembers to find out why they don't join.
- 16) Know your competition. Ask members why they belong to a technical organization and then explain why they need to belong to SWE as well.
- 17) Provide favors to attendees ( e.g., key chains, mugs, free passes, or the like) that fill out evaluation forms at each meeting.
- 18) Have a drawing for a door prize.
- 19) Conduct focus groups.

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- 20) Identify the questions most asked by your members, develop a list of brief answers, and distribute it to all the officers.
  - 21) Hold regular meetings with all officers and committee chairs.
  - 22) Hold an annual kick-off meeting in September to share successes of the prior year and plans for the upcoming year.
  - 23) Offer opportunities for members to meet influential people in industry .
  - 24) Maintain an open door policy. Encourage members to call you with their concerns.
  - 25) Publish a "Who to Call" list that matches staff with categories of member questions.
  - 26) Have officers/committee chairs develop a "Know It All Book" that contains frequently asked questions.
  - 27) Document a press relations plan and have a Public Relations committee to serve as a media contact.
  - 28) Have a suggestion box at every meeting to get ideas from members.
  - 29) Conduct an organization "sanity check." Does the Section organizational structure or chart make sense?
  - 30) Price some events higher for non-members.
  - 31) Keep a file on every member, with survey responses, interview information, address and name changes, etc.
  - 32) Ask your personnel office for the names and interoffice addresses of every woman engineer in the company. Send them membership information.
  - 33) Ask your company to pay for postage for membership mailings.
  - 34) Ask if your company will provide reprographic services for your membership materials.
  - 35) Request your company to be a corporate member. That way, you can get five memberships free.
  - 36) Have on-site meetings at companies where you have five or more members. Have these groups meet on a regular basis to encourage further membership.
  - 37) Find out what your company policy is for dues reimbursement. Let prospective members know if their dues can be company paid.
  - 38) Get to know employee relations people in your company. They are often very interested in supporting SWE.
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- 39) Solicit a "bigwig" in your company or school to be a supporter of SWE and use her/his influence to promote SWE.
- 40) Have a "Bring the Boss" meeting so that your supervisor can learn about SWE.
- 41) Use alumni and professional organizations as prospective member sources.
- 42) Always carry SWE applications and information packets with you.
- 43) Sell SWE attire so that members can be walking advertisements for SWE.
- 44) Have designated "greeters" at every meeting, outgoing people who have volunteered to chat with people as they arrive.
- 45) Take the first five minutes of every meeting to have the audience introduce themselves to someone they have not met.
- 46) Advertise for meetings everywhere, both in the community and the workplace.
- 47) Place meeting notices in the newspapers.
- 48) Get to know someone in the local media and tell them about SWE.
- 49) Make an effort to talk about SWE at least once every day.
- 50) Wear your SWE pin on meeting days.
- 51) Tell coworkers about SWE scholarships. Encourage them to suggest their daughters join SWE in college.
- 52) Display SWE awards at work.
- 53) Have members give "testimonials" of how SWE has helped them in their careers.
- 54) Give SWE magazine subscriptions to non-member speakers or combine with other gifts to non-members receiving special recognition.

b. Ideas for Student Upgrades

This is one of the easiest ways to increase SWE membership but perhaps the most underutilized for several reasons. The students in question are no longer part of the Student Section nor have they communicated to SWE Headquarters where they will be receiving SWE mail. A student's permanent and school address is recorded in the SWE database, if provided in the student's application. Given some students are not affiliated with either a student or local Section, SWE becomes the focal point for student upgrades. The approach to achieve student upgrades is dual focused:

1. Emphasize the fact that SWE Sections are a good networking tool for newly graduated job seekers.

2. Make clear the advantages of SWE as a great way to meet similarly educated women with whom new graduates can socialize.
  - a. *Tours*: Tours are a good way to draw members' coworkers and supervisors into SWE events. They are usually sponsored and easy to arrange.
  - b. *Events*: Local SWE Sections can host a "Get to Know SWE Night," inviting your Student Sections and the general public. Activity can include SWE member testimonials, officers & committee chair introductions, and tables displaying committee activities and literature. In addition, information regarding the history of the local Section, organizational structure of SWE Society of Women Engineers and potential positions for new members would be useful during this meeting.

### ***E. Student Membership Growth and Recruitment***

Low cost and convenience of location are two of the biggest factors in encouraging student attendance at SWE functions.

Events, which are consistent winners, include:

1. *Late Night Ice Cream Socials*: These are easy, relatively inexpensive and can be held in a dorm lounge or student union. They are a big draw for studious engineers returning from the library or study groups late at night. Because of the time of day, it is unlikely there will be other activities or students' work study jobs with which to compete. An added bonus is that by nature, the event is very conducive to networking.
2. *Tours*: Regardless of the location of the school, there are usually some local companies, which would make good tour sites. Since tours will most likely be held during the day, participation will not be as high as for other events. Also, transportation mayor may not be a challenge. Some companies have sponsored bus trips taking SWE members to tour locations with verified good attendance. The SWE advisor and local Section liaison may be able to help in this area. A good tour is a way to draw in new members. Popular tour locations, which can be found in some communities, include:
  - Local candy manufacturer
  - Radio or TV station
  - Telephone switching office
  - Manufacturing facility
3. *Mentoring Meeting*: Since one of a student's main interest is pursuing a degree, it makes sense to have a meeting to bring together freshmen with the more experienced members of the student body as well as mix with SWE members that are working in engineering fields. During the meeting, usually SWE members and/or upperclassmen make presentations to freshmen interested in pursuing specific majors. Freshmen can be divided into groups by area of interest. Juniors, Seniors, or graduate students can discuss career opportunities, professors, classes, degree programs, and internships.

4. *SWE Career Fairs:* Student Sections have had large success and support from universities organizing career fairs. At Northwestern University, they are able to encourage about 45 companies to participate annually in their "SWE Industry Day." It is open to the entire school and held in the ballroom of a local hotel on a Saturday in the fall. Close to 1000 students attend. It provides great visibility for SWE and the university and provides a wonderful opportunity for students to meet with representatives from local companies.
5. *Resume Books:* Some student SWE Sections publish SWE Resume Books for industry purchase as a fund raising activity. As SWE members, your resume may be placed in this book at no or a reduced cost. This activity is an excellent opportunity to encourage SWE awareness and grow your student SWE Section membership for all engineering students, regardless of gender, discipline, etc.
6. *Outreach Meetings:* Students, particularly freshmen who have their High School experiences fresh in their minds, are often enthusiastic about meeting with high school students to discuss careers in engineering. It's a popular campus SWE activity and great for the high schoolers who respond enthusiastically to engineering pep talks delivered by someone in their peer group.
7. *Company Presentations:* Student Sections have discovered that meetings with company representatives are quite popular especially if the company provides pizza or refreshments. Companies are interested in participating for a variety of reasons. Students are interested in attending for informational and networking reasons. Also, these activities are relatively easy to set up.

## ***F. Membership Processing***

Processing of potential, new and current members is the responsibility of the Membership Supervisor at SWE Headquarters. Timely processing of the required paperwork is essential in making a good impression. How many members have dropped out or potential members not joined because they didn't "hear back" from SWE?

### 1. How to Fill Out an Application

Although the application itself is self explanatory, it is important that the general membership understand that it is the responsibility of every member to help recruit new members.

Advantages include:

- a. Higher dues rebates for the local Section
- b. A wider sphere of contacts for the local members

Also, members need to take credit for their efforts by filling in their name on the "Sponsored By" line on the application's front page. This method enables SWE Headquarters to recognize individuals who have sponsored two or more members. A Membership Application form is provided in Attachment K.

## 2. Section Membership Records Roster

It is important to keep, maintain, and update member data files. The Section can identify talents and interests of members by conducting annual surveys. One member of your Section should have the responsibility to maintain the data. In smaller Sections, it may be the responsibility of the Secretary to maintain the data. Changes received in the Section from members should also be forwarded to Society of Women Engineers to ensure that the database is updated.

To ensure database accuracy you may want to conduct an annual survey of the membership or use other avenues within membership activities to update member data. The database is often used for generating newsletter mailing labels. Coordinate with the newsletter committee so that one accurate database can be maintained. With the use of personal computers, maintaining a database should be easier. Setting up a database may be more problematic - try to use software that is either portable or very popular, so that the database can be passed on to your successor.

## 3. SWE Headquarters Membership Database Fields

Attachment L contains a listing of the fields contained in the membership database maintained by the Membership Supervisor at SWE Headquarters.

### ***G. Resources***

#### a. Member Handbook

Locally prepared membership orientation packets or Member Handbooks should be provided to all new members. This will serve two purposes. First, it will help answer questions about SWE for your new members. This information is vital if members seek funding from their employers or recruit coworkers. Second, the more new members know about SWE, the more comfortable they will feel with the organization, and the more inclined they will be to participate.

Information to be included in the Handbook:

1. SWE Contact Information: names, addresses, phone numbers, email address, titles and function of each of the members of Society of Women Engineers Headquarters Staff. This sheet needs to be updated and distributed to all members annually.
2. SWE Section or Members -At -Large Bylaws
3. SWE Section or Members -At -Large History
4. SWE Vital Statistics: date started, number of members (including students), locations of Section, status as non-profit organization.

### ***H. Publications***

Following is a listing of resources available to SWE members. Copies of these documents can be obtained from SWE Headquarters or by contacting the appropriate SWE Committee Chair.

1. SWE Web Site: <http://www.swe.org> - The SWE Web Site has useful information about the Society and its committees.
2. Articles of Incorporation/Bylaws -Rules that govern the operation of SWE are contained in the Bylaws. Bylaws can only be changed upon a vote of the Council of Section Representatives. See Attachment M.
3. Section Bylaws -Sections, Student Sections, and Members-At-Large may have their own Bylaws.
4. Policy and Interpretation (P&I) -As defined in the Society Bylaws, the Council of Section Representatives is responsible for establishing policy, while the Board of Directors is responsible for interpreting and implementing these policies. Policy and Interpretation (P&I) are written interpretations of the bylaws or of customs and practices of the Society. See Section II.I for more information.
5. Section Manual -The Section Manual provides general guidance, practical suggestions, and answers to questions about SWE.
6. Student Section Manual -This manual provides general guidance, practical suggestions, and answers to questions about SWE. It is tailored for Student Sections.
7. Membership Manual -This manual is intended to assist Membership Chairs/Committees and Sections in building, running and/or expanding Sections' membership programs.
8. Members-At-Large (MAL) Newsletter: See SWE Web Site
9. Student Activities Committee (SAC) Newsletter
10. Membership Newsletter
11. President's Panorama
12. SWE Recruitment Brochure
13. SWE Upgrade Brochure
14. SWE Awards Program Manual
15. Career Guidance Related Information: See SWE Web Site
16. Continuing Development Related Information: See SWE Web Site
17. SWE Procedures: Attachment N contains the Table of Contents from the SWE Procedures Manual.

## **IV. Expanded Membership Program**

### ***A. Membership Retention***

Delivering satisfaction to your members is the key to retaining and increasing your Section's membership. Membership satisfaction is an ongoing process, which begins when the Section obtains a clear understanding of members' needs, wants and expectations.

Encouraging membership retention is a function of SWE. Depending on your Section's interest, demographics, and goals, some of the following ideas may meet your individual Section's needs. Numbers have been added for Membership Chair/Committee discussions as they facilitate discussion and address activities to encourage membership retention.

- 1) Send members and prospects a year in review document every July highlighting all accomplishments and services of your Section.
- 2) Conduct member blitz days during which Section officers make "How are you and what can SWE do for you?" calls.
- 3) Send a "Don't Miss Out" flyer describing upcoming member only benefits to members at dues bill time (well before December 1 Society of Women Engineers Headquarters drop date from membership rosters).
- 4) Prepare a membership justification sheet showing the hard-dollar savings associated with a member's dues.
- 5) Use the SWE magazine or local newsletter to highlight your Section's activities and member benefits.
- 6) Use your newsletter to reprint the questions and answers most asked by your members.
- 7) Solicit quotes from satisfied members to use in a Section brochure or newsletter.
- 8) Offer a series of special meetings limited to members only and feature a significant speaker.
- 9) Schedule special yearly mailings of less time-sensitive information such as resume database service, Section sale items, brochures, etc.
- 10) Establish an electronic bulletin board at area companies, accessible by both members and non-members.
- 11) Recognize your volunteers through awards, letters to management, and newsletter features.
- 12) Put charts (thermometers or yardsticks work well) in the newsletter and celebrate when milestones are attained. Engineers love data!

- 13) Implement a peer recognition program. Have the Section President or the membership chair take a person to lunch for providing outstanding membership service by a Section officer or committee chair.
- 14) Develop a consistent look for all your Section's correspondence. Design a Section logo.
- 15) Create a central member database to allow everyone access to the same information.
- 16) Contact all members at least once a year for something other than money.
- 17) Form cross-functional project teams.
- 18) Hold an annual leadership training session for your officers/committee chairs.
- 19) Organize historical files of membership retention rates, revenue sources and the like and note any trends.
- 20) Develop five year membership projections and Section or Members-at-Large goals.

### ***B. Member Needs Assessment: The Nuts and Bolts***

To increase Section membership satisfaction and growth, your Section should develop a member needs assessment. This requires that you ask certain questions:

- Who are the members, past members and potential members?
- What are member needs and expectations of Section services?
- What should be done to respond to these needs?
- Should member expectations be exceeded?

While these questions may appear easy, one member, a committee or your Executive team, cannot accurately answer them internally. It is important that the Section conduct research to gain input and answers from current and prospective members.

#### ***Goals***

The first step in conducting a needs assessment is to determine the goals of the survey. Perhaps an easier way to examine this is what decisions should the research help you make.

Here are some examples of possible goals you may have:

1. Discover the value members place on current services to determine if the Section should continue or discontinue specific services.
2. Pinpoint unmet member needs, which can be used to identify potential new services or activities.
3. Measure product/service satisfaction to uncover sources of dissatisfaction and areas that need improvement.
4. Rank the importance of current/potential services to help the Section determine the priority of

services.

5. Identify key professional issues to assist the Section in selecting programming topics or setting priorities.
6. Evaluate the value of services or programming over time to monitor changing member needs or new opportunities.

As a secondary goal, you may *wish* to gather demographic information, which can serve to further define segments of members. Questions on member age, gender, level of education, office and residence locations, type of business (employed or self-employed), and industry should appear at the end of your survey. This placement is recommended since they may not complete the demographics at the end but may answer the survey.

One or more of these goals may be the purpose of your assessment. Careful definition of your survey goals assures that you collect the data needed to make relevant decisions.

### ***How to Define Member Needs***

Typically, members seek to benefit from an association in three ways: through technical information and networking to solve problems, through the ability to shape legislative or regulatory initiatives that affect their jobs, and finally, through the recognition of peers or the status of belonging to a professional society. Members may belong for any, or all, of these reasons and others.

### ***Cross-checks***

Each of these needs or benefits must be explored and cross referenced by the amount of time and money a member is willing to spend for the benefit. Time and money variables will assist the Section in developing the right format for services. For example, a member who rates the need for information very high but has little time to attend meetings would value increased technical information provided in a newsletter more than additional seminars.

### ***Past Behavior***

Another way to group members is by their past behavior. Questions uncovering past behavior can be predictive of the types of services or products a member will buy/use in the future. If a member has attended every meeting in the past year, chances are that she/he is likely to attend in the future.

By grouping the needs and behavior of your members, the survey results will tell you what services are important to your members and the types of services which should be developed or discontinued.

### ***Who Will You Survey?***

The second step, deciding whom to survey, requires planning on the part of the Section. Do you want to survey potential members? Members? Specific subgroups of your members? Do you need information from subgroups, such as veteran professionals versus novice professionals? Resolve these questions before you develop your survey. Your questions will vary depending on the group from whom you collect information.

Some Sections may ask, "if this is a member needs assessment why mail to prospects?" A needs assessment sent to prospects can help your Section develop programs or services which will aid you in recruiting these members.

The next consideration is whether to survey potential or current members or a sample of each. A general rule of thumb is that the smaller the population, the larger the percentage sample you need to get the same degree of confidence. Confidence level measures how representative the sample is of the entire population. For example, suppose a Section with 1,000 members wants a 95% confidence level and expects a 30% return rate, the Section would need to mail to a random sample of 566 members. This number was calculated using a market research computer program. In general, Sections under 750 members should mail to all members rather than a sample of the membership.

If you are from a large Section and plan to use a sample, be sure to use proper sampling procedures. The sample should be selected so that everyone in the population selected has an equal chance to be selected. The most practical approach for Sections to use is the systematic sample. This involves starting with a number, which is obtained using dice or by blindly selecting numbers from a random table, and then choosing every *n*th person (an example of *n*th person is the seventh, or eighth, etc.).

### ***Survey Design***

When developing the survey, make sure that each question seeks information related to the decisions you will make based upon the results. Remove any questions which do not pass this standard.

Many times people suggest questions because "it would be nice to know." The end results of "nice to know questions" are added time and money in the tabulation and analysis stages. Additionally, non-essential questions can make a survey so long that members will not take time to complete the survey.

There are two types of questions: close or open-ended. Close-ended questions include multiple choice or rating scale questions. Close-ended questions are easy to summarize and analyze. Respondents can complete closed questions more quickly than open-ended questions. Open-ended questions include fill-in-the-blank, short answer and comments. Open-ended questions are more difficult to summarize and analyze and may include irrelevant information. Generally, the bulk of your survey should include close-ended questions, however a few open-ended questions are useful to collect unanticipated, hard to quantify information.

A good question will produce reliable and consistent information in similar situations. Use these considerations to evaluate the quality of survey questions:

- Does the question ask for only one piece of information?
- Will the wording affect responses?
- Are any words emotionally loaded, vague or overly general?
- Does any wording have a double meaning, which may cause misunderstanding?

- Does the question use abbreviations or jargon that may be unfamiliar to some of the respondents?
- Are the response options mutually exclusive and sufficient to cover each conceivable response?

Pre-testing the survey with approximately 10-15 people will tell you if there are problems with the way that questions are worded. A sample Educational Program Survey Sample is provided in Attachment O and a Needs Assessment Survey Sample is provided in Attachment P.

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## SAMPLE SURVEY QUESTIONS

### **Bias**

Poor: Should we raise meeting prices for our Student Members who can't afford it any more than we can?

Good: Do you believe that we should increase the meeting prices paid by Student Members from \$5 to \$10 per meeting?

### **Vague**

Poor: Do you attend meetings regularly? (which meeting, when, how often)

Good: Have you attended our National Convention and Student Conference in the past three years?

### **Double Meaning**

Poor: Do you favor reducing the Section deficit by raising dues? (two separate issues: existence of a deficit and a dues increase)

Good: Should the Section be allowed to operate with an annual deficit?

\_\_\_\_\_yes \_\_\_\_\_no

What should be done to eliminate the Section deficit?

\_\_\_\_\_ eliminate programs \_\_\_\_\_ raise meeting fees

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### **Data Collection**

Data collection should be handled by phone or mail. To avoid bias or non-representative survey results, do not use a convenience sample. Including the survey with your newsletter mailing is one example of a convenience sample because only those members who read the newsletter will notice and respond to the survey. A second example would be handing out surveys at the monthly meeting. This form of distribution will also bias your results because only those members who attend the meetings will receive the survey.

Convenience sample results are not representative, which means the results cannot be generalized to all members.

A high response rate is very desirable. This reduces non-response bias. Code all surveys so that you can follow-up with non-responders. Build second or third contacts into your budget and plan.

Here are few more tips to enhance your response rates:

- Send a postcard ahead of time notifying them that they will receive a survey,
- Include an explanatory cover letter with the survey,
- Entice participation by offering an incentive coupon discounting the fee to attend at next meeting; attaching \$1.00 to the survey; or providing a chance in a raffle for a big prize,
- Construct an easily completed survey which contains a lot of white space,
- Explain that demographic questions help the Section meet the needs of subgroups,
- Always use ranges for sensitive information like salary, etc.,
- Place demographic or sensitive personal information at the end of the survey, and
- Follow-up with non-responders sending another cover letter and survey.

### ***Data Analysis***

Various statistical procedures such as cross tabulations or cluster analysis can provide useful results. Consider contacting a local college or university marketing department for low cost services in this area. Depending upon their policies, some colleges may even assist in writing questions or collecting information. However, if you plan to use a college or outside firm to handle data tabulation or analysis, be sure to talk to them before you finalize the questionnaire. The college or firm may be able to provide advice in survey wording, which will reduce tabulation costs.

### ***Share the Results***

Be sure to communicate survey results in simple terms for all survey participants as well as members. You may want to put a summary or series of articles in your monthly newsletter and/or present the findings during a business meeting.

Simply reprinting the survey with numbers tallied disregards the reason you conducted research to make decisions. Focus your communication on what the numbers tell you. Do you need to decrease the price of a service or add value for no extra cost to an existing product? Are most members unaware of certain benefits? Is there a hot topic on which most members or potential members need information? This is the type of information that will keep the attention of your readers/attendees.

And finally, be sure to preface your report with a brief explanation of how the research was conducted. Tell your audience whether all members or a sample of members was surveyed, who participated in the research (members, prospects or past members) and how many people responded.

### ***Now that you have the Results, What's the next Step?***

1. Identify what changes are required.

Look at your current services and listen to what your members have told you about what services are good, bad or missing.

2. Members' priority ratings of services will differ by membership segments. Not all members may need or value all of your services. Define and understand your member segments based on needs and behavior rather than type of membership (Member, Senior Member or Associate Member), title or demographic data.

In analyzing membership survey results, be aware that member perception defines reality. Knowing this point can help eliminate internal disagreements over the value and benefits of current services. If your members do not see benefits, the service is either not being performed or communicated properly or members do not value the benefits.

Your members and prospective members are the only ones who can correctly define their needs and expectations. It's risky to copy exactly what other Sections do. How do you know that those Sections know their members' needs better than you do? Remember members from other Sections are not the same in terms of work settings or experience.

3. Implement the change process by preparing a detailed action plan.

It may take you more than a year to start several new services and/or improve the quality of existing programs. You will need to prioritize your actions. Begin with services that are viewed as most important or those activities in which your Section has identified as deficient.

Put your new services/actions in your long-range plan. Describe in detail how you plan to carry out improvements and develop new ventures. This is especially important in a volunteer organization. You need to provide a game plan for your successors so that the change process continues after your tenure.

4. Track and measure results based on members' perspectives.

Because most needs change quickly, your Section must regularly (perhaps once a year) monitor members' needs and expectations. This enables you to react to changes and take advantage of opportunities that surface.

It seems easy to provide an initial members' survey or new member orientation, however, many groups have a hard time admitting that member needs are not being met. If members do not know about or value the services you provide, the Section is either:

1. not doing the right things,
2. not doing things right, or
3. not doing them consistently.

To retain and add members, the Section needs to identify and satisfy their needs. When a Section conducts a survey and constructively uses the findings to fulfill member needs, the process establishes and strengthens the bond between the members and their local SWE Section.

**Definition of Terms**

Convenience Sample - a non-probability sample. This sample includes people contacted easily such as those attending a conference or participating on a committee. Frequently, these are not representative of your entire population (members).

Probability Sampling - a group of individuals that have been selected so that everyone in the population to be studied has a probability of being included. Reliability of information obtained from this type of sample can be computed.

Simple Random Sample - each individual has an equal chance of being selected. The list cannot be duplicated. You need a database program to pull this from your mailing list.

Systematic Sample - a practical approach to obtaining a probability sample. Using a random start, selection is based on a systematic or nth name sample.

Confidence level - a measure of how representative your sample is of your total population (and thus whether your conclusions can be generalized to the entire population).