

Caring for CARE Act Planning Bodies

January 2004

A Guide to Recruiting and Retaining Planning Council and Consortia Members

COMMUNITIES ADVOCATING
EMERGENCY AIDS RELIEF

CAEAR

COALITION
FOUNDATION

ACKNOWLEDGEMENTS

The Communities Advocating Emergency AIDS Relief (CAEAR) Coalition Foundation gratefully acknowledges the Title I & Title II grantee and planning body representatives who participated in the focus groups and key informant interviews that led to the completion of this training guide.

The foundation also acknowledges, the staff who worked on this guide Venessa Hadley and Pia Hill, Oxygen Communications and 202design for their editorial and technical support.

This guide was funded by the Health Resources and Services Administration (HRSA), HIV/AIDS Bureau, U.S. Department of Health and Human Services. The contents of this guide are based on the findings of the CAEAR Coalition Foundation and do not necessarily represent the official views of HRSA.

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This publication was supported by grant number #1-U69-HA00045-02 from the Health Resources and Services Administration, HIV/AIDS Bureau. Its contents are solely the responsibility of the authors and do not necessarily represent the official views of the Health Resources and Services Administration.

Introduction

U.S. communities hardest hit by HIV and AIDS have responded by providing care, services and support for people living with the disease. Many of these activities are funded through the Ryan White Comprehensive AIDS Resources Emergency (CARE) Act. First enacted by Congress in 1990, the CARE Act was amended and reauthorized in 1996 and again in 2000. The CARE Act pays for primary health care and support services that address the unmet health needs of people living with HIV disease, and provides funds through several funding streams, called “Titles.”

To ensure that the funded programs meet the needs of their communities, the CARE Act requires that communities convene planning councils and consortia that include consumers and other advisors. The role of these groups is to determine together how the CARE Act funds will be spent in the community.

This guide was created to help planning councils and consortia recruit and retain members in their communities. It contains an overview of recruitment and retention strategies, as well as worksheets that planning councils and consortia can use to assess their needs and priorities. The guide will be useful for both the staff and leadership of these groups, as well as others in the CARE Act community.



The CARE Act's Training Requirements

In 2000, Congress reauthorized the Ryan White CARE Act and indicated that planning councils and consortia provide training to their members so they can “serve effectively and improve the allocation of resources for services.”

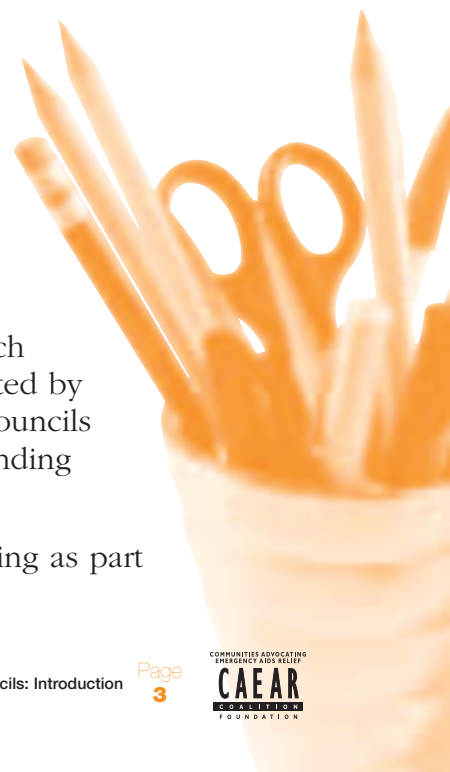
To help meet this requirement, the HIV/AIDS Bureau (HAB) of the Health Resources and Services Administration (HRSA) created guidebooks and other documents such as the *CARE Act Title I Manual* and *Title II Manual* and *Training Guide: Preparing Planning Bodies*. These documents are available on the HAB website at <http://hab.hrsa.gov/tools.htm>. The HAB site also provides overviews of Title I and Title II and the rest of the CARE Act, as well as other practical information.

HAB specifically recommends that planning council and consortium members receive training on certain topics, including:

- The content and intent of the legislation;
- Their specific roles and responsibilities in meeting the requirements of the law;
- Meeting procedures such as Robert's Rules of Order;
- The effects of conflicts of interest on the work of the group, and how the group can address such conflicts when they arise;
- Cultural sensitivity about different group members' viewpoints;
- Cultural awareness about the needs of varying groups and underserved populations within the community;
- The use and interpretation of data as a decision-making tool;
- Treatment requirements of HIV disease, and how these affect the costs and accessibility of ambulatory outpatient care and primary care; and
- The group's roles and responsibilities as health care planners for community residents living with HIV/AIDS.

Providing training along these lines is a requirement for planning councils, entities that operate as part of the CARE Act's Title I, which provides emergency assistance to localities disproportionately affected by the HIV/AIDS epidemic. Starting in 2002, HAB required planning councils to include an overview of their training program as part of their funding applications to the bureau.

Training also is considered useful for members of consortia, operating as part of the CARE Act's Title II.





Planning Council and Consortium Responsibilities

Title I Planning Councils

The planning council is a group of people responsible for planning how to use Title I funds to deliver services within a specific locality, or Eligible Metropolitan Area (EMA)

Planning council responsibilities include:

- Establishing planning council operations. The council's key operational responsibilities are to: consider nominations for the council; bring in new members; address conflicts of interest; settle grievances through established procedures; and make decisions about how best to use Title I funds.
- Conducting needs assessments for their communities.
- Setting priorities and developing a comprehensive plan for use of Title I funds.
- Ensuring coordination of care and development of a statewide coordinated statement of need in collaboration with Title II.
- Evaluating grantees' performance in distributing funds and in following the priorities set by the planning council.

Title II Consortia

Title II provides grants to states and territories to improve the quality, availability and organization of services for people living with HIV and their families. Title II also funds the AIDS Drug Assistance Program (ADAP). Title II consortia are local, city, county or statewide groups that assess the need for services and make decisions about how to use funds in the state.

Consortia responsibilities include:

- Conducting needs assessments to identify and describe specific service needs in the state.
- Identifying populations, groups and families affected by HIV disease, particularly those experiencing health care disparities and/or living in medically underserved communities.
- Ensuring that services address the needs identified in the state assessment. (This responsibility typically is carried out through structured priority-setting and resource allocation.)
- Developing a comprehensive plan to address health care disparities and improve access to services in historically underserved communities, in consultation with specific stakeholders and review the Statewide Coordinated Statement of Need (SCSN).
- Overseeing the coordination and expansion of resources at the community level.

This booklet provides information on membership recruitment and retention for both planning councils and consortia. Although the two groups are different, they have similar needs and face similar challenges in recruiting members and keeping them involved.





Membership Retention for Planning Councils and Consortia

People volunteer for and engage in community service work for many reasons. These can include wanting to be part of their community, wanting to be involved in important decisions, or wanting to advance their careers through networking.

In the end, however, volunteers must get a positive feeling from their participation, or they won't continue it. People cite a range of reasons for volunteering to serve on planning councils or consortia. They want to:

- Feel valued and appreciated;
- Be part of something important or necessary;
- Connect with the community;
- Be a member of a larger group;
- Network and meet new people;
- Learn new skills and talents; and/or
- Accomplish goals.

Successful retention efforts are those that aim to help members achieve these goals while deepening volunteers' connection to the group and its mission.

Why Members Leave

At the same time that they are working to help volunteers realize the benefits of membership, planning councils and consortia need to eliminate or minimize the “negatives” that compel people to leave these groups.

According to a poll taken with planning council leadership, each year, 65 percent of membership loss is due to reasons over which the councils have no control. Among the most common reasons members leave: they move out of the area; they face conflicting pressures (such as too much work, family demands, lack of time and temporary illness); or they experience traumatic events or die.

While this number is significant, it still means that potentially 35 percent of membership loss—more than a third— could be prevented. The bottom line: councils and consortia can dramatically improve their retention by focusing on, and addressing, the avoidable reasons that members leave.



Based on a series of focus groups with current and former members of planning councils and consortia, the CAEAR Coalition Foundation developed a list of 14 common reasons people cite for leaving these groups. The common element across the reasons: burnout and frustration on the part of members, who are likely to leave the group once these feelings take hold.

Focus group participants noted the following reasons for leaving their planning councils or consortia:

REASON #1

Members lack information about the planning council/consortium process.

Some members left consortia or planning councils because they did not receive enough information about the groups' work and the CARE Act's goals. Without a real understanding of the purpose of the planning councils or consortia, or of the CARE Act itself, it can be hard for members to engage with the group, become committed to its goals and play an active role in its work.

RECOMMENDATION:

New members must have complete and accurate information about the purpose and activities of the group in order to become fully engaged in the work of the consortium or planning council.

REASON #2

Members could not commit to the requirements of serving on the planning council or consortium.

Sometimes, individuals are recruited and brought into planning councils or consortia without having a clear idea of what their position will entail. If members have not received accurate and thorough information about the requirements of the position, they may discover, too late, that the group's activities are not very interesting to them. Another problem may be that members are more interested in the incentives offered to planning council and consortium members (such as transit vouchers and meals), rather than the less tangible benefits of membership.

RECOMMENDATION:

Members must completely understand their role and the attendant responsibilities and fully commit to being active participants in the work of the consortium or planning council.

REASON #3

Members could not be fully involved in the work of the group.

In the same way that some members might not fully understand their responsibilities, some may join a planning council or consortium only then to realize that they do not have the time or energy to do the work of the group. This tends to happen when individuals are brought on board without having a realistic and complete sense of what being part of the planning council or consortium will involve, or how much time it will consume.

RECOMMENDATION:

Members must be fully informed of their expected time and energy commitments so they can weigh the demands of service against other commitments in their lives.

REASON #4

Procedures are too formal and complex.

The processes and procedures used by the planning council or consortium can seem overly complicated to many members. Without training in how the group will run its meetings and reach decisions, members may become alienated from the work of the planning council or consortium, viewing its procedures as arbitrary and needlessly formal.

RECOMMENDATION:

Members must be trained in whatever meeting procedures are used (such as a consensus model or parliamentary procedure such as *Robert's Rules of Order*). In addition, these procedures must be used consistently to make the process transparent for members.



REASON #5

Members are included in the group, but not involved in its processes.

Individuals may leave planning councils or consortia because they don't feel involved in the work of the group. Sometimes, individuals are brought on board but are not trained to be effective members of the group. Others may feel that they are only nominally included in the general processes of the group and are left out of actual decision-making or real project implementation. This leaves them embittered and dejected, and they feel they have no incentive to stay on.

RECOMMENDATION:

Consortia and planning councils must work to ensure that all members are engaged and can participate to the fullest extent possible in the work of the group.

REASON #6

Members dislike the presence of cliques in the group.

Some members find that the work of the planning council or consortium is dominated by a small group of insiders who appear to make all of the decisions and control the group process. This makes the "outsiders" feel alienated and can contribute to burnout among leaders who are doing all of the group's work.

RECOMMENDATION:

Planning councils and consortia must work to bring all members into the decision-making process and ensure that everyone understands how he or she can participate.

Groups also need to ensure continual leadership development and enhancement so that a core set of people are not always making the decisions and doing the work.



REASON #7

Members dislike “made-up” rules.

Sometimes, members leave a planning council or consortium because they perceive the group’s rules to be either arbitrary or applied inconsistently among members. It may be that members are not well informed about the decision-making processes. Or, unspoken rules may have developed among longstanding group members, a situation that can make the process appear confusing and exclusionary to others. In other cases, different rules appear to apply to different group members—for example, when minimum attendance policies are cited as justification for removing some individuals but not others.

RECOMMENDATION:

Policies and procedures must be clearly explained and understood by everyone in the group, and then applied consistently to all members.



REASON #8

The planning council or consortium does not provide enough opportunities for interaction among members.

As noted above, some people join a planning council or consortium only to discover that the activities are not what they expected. In some cases, members find meetings and activities to be much more didactic and less interactive than they thought. What’s more, if members joined the planning council or consortium seeking training and engagement with people served by the CARE Act, they may be disappointed in the reality of the group’s planning and assessment work.

RECOMMENDATION:

Planning councils and consortia need to fully explain their work to prospective members, giving them a detailed understanding of the typical activities undertaken by the group.

REASON #9

The planning council or consortium provides insufficient incentives to make membership attractive and convenient.

Incentives such as transportation vouchers and day care for children make service on a planning council or consortium more attractive and, in some cases, are essential to an individual's ability to participate. For example, the food served at meetings is extremely important to some members; groups should not assume that all members are getting adequate nutrition elsewhere. When food is provided at meetings, it should meet people's needs; in other words, don't offer snacks if your members need dinner.



RECOMMENDATION:

Consortia and planning councils must work to ensure that appropriate incentives are offered to members, and that the incentives meet the members' needs.

REASON #10

Meetings are not well prepared and/or well run.

Members may resign from planning councils or consortia because meetings are disorganized and/or too lengthy. Over time, leaving the group is preferred over continuing to attend meetings that are not well run.

RECOMMENDATION:

Groups can work to ensure that their meetings run smoothly and efficiently by setting a regular meeting schedule, distributing agendas before the meetings, and keeping them to a reasonable length of time.



REASON #11

The planning council or consortia is not attentive to member's needs, particularly in times of crisis.

Group members often experience personal crises or situations that hamper their full involvement in the work of the planning council or consortium. If this happens and other group members—or the council or consortium as a whole—are perceived as either uncaring or unchanged in their expectations of a high level of commitment from the individual, then he or she may be inclined to bolt.

RECOMMENDATION:

Groups must remain attentive to members' special needs and/or situations, while not overwhelming any one person with too many tasks. Group leaders must understand that everyone's life is complicated, and that it should be perfectly acceptable for members to take a leave of absence when circumstances demand it.

REASON #12

The costs of participating in the group are too high.

Many people forget that it can be expensive to attend meetings; things like transportation and child care often aren't free. Indeed, some people leave planning councils or consortia because they cannot afford to travel to the meeting site, pay for child care during the meeting time or take time off from work.

RECOMMENDATION:

Groups must work to ensure that meetings are accessible for all members—for example, by holding meetings near public transportation and affordable parking, providing child-care, and feeding members. Where allowable, groups also should provide incentives and other supports that will encourage maximum participation.



REASON #13

Meeting times are inconvenient.

Some members who work for organizations that support the goals of planning councils and consortia are encouraged by their employers to attend meetings. Others are usually free during the times when meetings are held. For people who do not fall into either of these categories, however, finding the time to attend meetings can be very challenging; all meeting times pose potential challenges.

RECOMMENDATION:

Groups should work to schedule meetings at times that are convenient for as many people as possible, while acknowledging that meeting times will have to shift as new members, with differing schedules, join the group. Alternating day-time, evening and weekend meetings ensures that everyone will be able to attend at least some.

REASON #14

The meeting venue presents difficulties for members.

Meeting sites are important; they must be accessible and easy to get to. This is especially important for members who are physically challenged, and for those who use public transit to get to meetings.

RECOMMENDATION:

Groups must ensure that meetings are held at sites that are accessible and welcoming.





Using Recruitment, Training and Engagement to Create an Effective and Sustainable Group

In general, planning councils and consortia can minimize the problems that cause member departures and enhance overall retention by actively working on three key areas: **RECRUITMENT**, **TRAINING** and **ENGAGEMENT**.

- **RECRUITMENT** means ensuring there is a good fit between new members and the planning council or consortium. It can be enhanced by creating an effective and organized recruitment process that fully informs prospective members about the group, its function, processes and purpose, as well as the roles and responsibilities of members.
- **TRAINING** means providing opportunities for new members to enhance the skills and knowledge needed to fulfill their responsibilities on the planning council or consortium. Well-organized, regular trainings help ensure that members understand the group's processes and procedures and have the knowledge and skills to serve effectively.
- **ENGAGEMENT** means keeping members interested in and committed to the work of the planning council or consortium once they join the group. To facilitate strong engagement, groups should establish systems and processes to involve all members in the work of the planning council or consortium and assess the group's functioning on a regular basis.

The following pages offer specific tips and ideas for improving your group's performance in each of these three areas.



RECRUITMENT

Tips for Finding the Right People

TIP #1

Organize a member recruitment program guided by a plan of action.

New planning council and consortium members do not simply appear; they must be identified, recruited and welcomed into the group. A recruitment program guided by a detailed plan of action helps to systematize recruitment of new members and provides a mechanism for all group members to reach out to potential volunteers.

TIP #2

Provide council and consortium members with information and tools to become effective recruiters.

Develop a business card and fact sheets about the work of the planning council or consortia. This material can be made available at all public meetings and other functions as a way to inform people about the work of the group; it also can be distributed directly to potential future members. The information should include an overview of the planning council or consortium, its roles and responsibilities, plus a schedule of meetings and contact information.

TIP #3

Incorporate membership development programs into the group's work.

Membership development must be incorporated as part of the group's on-going work. Set aside specific meetings to address membership development and recruitment. At these meetings, the planning council or consortium can hold workshops, talks and trainings to expand the skills and knowledge of current members, while also highlighting their role in identifying and recruiting new members. These meetings are great opportunities to initiate member discussions of the group's accomplishments and future plans; provide skills-building on meeting management and parliamentary procedure; and offer informative overviews of the HIV/AIDS epidemic and community responses.

TIP #4

Invite colleagues to observe meetings as potential members.

People are much more likely to become involved in a group when they understand what being a member will be like. Inviting prospective members to attend planning council and consortium meetings allows them not only to observe the work of the group, but also to meet current members and form relationships with them.

TIP #5

Develop a document or presentation that describes the accomplishments of the consortium or council and explains its contributions to HIV care in your community.

In order for new members to become engaged in the work of the planning council or consortium, they have to understand what that work is. The materials that are provided to potential group members should therefore include a compelling overview of the group's work. What has the planning council and/or consortium done? How much money has been channeled into care for people living with HIV disease? How have these funds made a difference in the community? You can also provide this overview to decision-makers, stakeholders and members of the press, as another way of broadening understanding about the CARE Act and the work of your group.

TIP #6

Show a genuine interest in prospective members. Find out what information they need to decide about joining—and provide it.

Too often, planning councils and consortia consider what they need from prospective members before weighing what these individuals need themselves. To ensure that new members are a good fit and are committed to the work of the planning council or consortium, it is important to get to know these people, find out what they need in order to make an informed decision about participating, and make sure that all of their questions and concerns are addressed. One strategy is to have one or more current group members serve as contact points, or mentors, for prospective members. By linking potential members with people who are already on the planning council or consortium, you can help nurture a strong bond and ensure that people are getting the information they need to make the right decisions.





TIP #7

Develop a website that explains the mission, accomplishments, operations, membership requirements and responsibilities of the group.

A website can include electronic versions of the outreach materials discussed in Tips 2 and 5. The site also can be used to post meeting agendas and minutes, as well as links to the websites of member agencies. Your planning council or consortium might also consider using e-mail to offer more information about the work of the

group. Once you have the information in a presentable form, it is easy to send it to people as a link or an e-mail attachment.

TIP #8

Submit information about planning council accomplishments and membership needs to local newspapers, electronic media, and relevant listservs.

The more the public knows about the work of your planning council or consortium, the better. One way to help community members learn what the group is working on—and the importance of that work—is to publicize your meetings, activities and decisions. Providing information to the press (television, cable, newspapers and local radio) helps inform the community about your work and may generate additional volunteers and interested members. Yet another way to let people know what the group is doing—and what kind of volunteers it needs—is to communicate with neighborhood, community and professional listservs.



TIP #9

Wear a button at functions and conferences where potential members may be attending. The slogan: “Ask me about becoming a member.”

People may not know how to become a planning council or consortium member—some may not even know that the groups are made up of volunteers from the community. Wearing a button, posting signs asking for new members, and/or having literature available at meetings are all ways to let people know that they can become more active in the work of the planning council or consortium. Inviting people to ask about becoming a member is a welcoming way to open the conversation and meet new volunteers.



TIP #10

Build a reputation as an effective group.

Everyone is busy, and no one wants to be part of a group that doesn't deliver effectively on its mission. Your best recruitment tool, therefore, may be your group's reputation in the community. Ensure that the planning council or consortium is an effective group, with meetings that start and end on time, are efficiently chaired and follow a meaningful agenda. And, as noted above, make sure people know about your accomplishments in the community. Knowing that yours is a well run, high-performing group will be great encouragement to those who are thinking about joining up.

TRAINING

Building and Maintaining Members' Knowledge and Skills

TIP #1

Hold an orientation at the beginning of new members' terms.

Regardless of how good a job you've done educating and informing prospective members about the work of the group, a new member orientation is an absolute necessity. Hold this orientation before the first meeting that new members will attend, and use it as an opportunity to discuss the work of the group, the decision-making processes, leadership development, roles and responsibilities, and the group's schedule for the year. Even if these things have been discussed while the members were being recruited, they will benefit from hearing it again. Handouts and materials such as committee descriptions and the group meeting calendar are also important to provide to members at this time.



TIP #2

Distribute a questionnaire to new members to gather information about their needs and interests.

No matter how well you've planned for new members' needs, people may require additional information or guidance. Create a process by which you can survey new members about their needs, and make sure the group is able to meet any needs that arise. It's a good idea to survey new members a couple of times during their first year. The reason: Their needs and interests may change as they start becoming part of the group.

TIP #3

Establish a regular training cycle

Create a yearly calendar that includes not only regular meeting dates, but also dates to be used for trainings, workshops, field visits to AIDS service organizations and other special events. In addition, the planning council or consortium should reserve certain meeting dates for membership development, which includes training and education for new *and* current members. As noted in the recruitment section above (Tip #3), these

meetings can include discussions of the group's accomplishments and future plans; skills-building on meeting management and parliamentary procedure; overviews of the HIV/AIDS epidemic and community responses; and more.



TIP #4

Evaluate trainings and other activities.

It's fairly easy to offer trainings and workshops, but it is harder to ensure that they are of a consistently high quality and capture the attention of participants. Use evaluations after each training or workshop to gather feedback on the sessions and make any needed adjustments. Asking for member input and feedback on new activities not only helps you ensure that trainings are appropriate, but also communicates to members that their opinions matter.

TIP #5

Continue to help members grow and learn.

Training and other skill-building opportunities provide members with tangible benefits in return for their service on the planning council or consortium. Groups should work to institutionalize training and member development by establishing a continuous schedule of training and ensuring that group members are continually learning new skills.

ENGAGEMENT

Keeping Members Active and Involved



TIP #1

Start on day one.

It is almost impossible to keep a member on board when he or she is unhappy, ready to leave and has “one foot out the door.” It’s much more effective (and more pleasant for everyone) to keep members engaged, committed and happy with their contributions to the group. Start on day one by making retention efforts part of the normal day-to-day functioning of the consortium or planning council.

TIP #2

Disperse responsibilities among members.

Involving members in the day-to-day operations of the planning council or consortium is an important retention tool. The CAEAR Coalition Foundation’s research suggests that members who feel excluded from the work of the group become unhappy and eventually leave. The key to success: establish mechanisms for everyone to be involved. When new members join, connect them with an established volunteer who can help show them the ropes and answer any questions they may have. In addition, all group members should serve on at least one committee and be expected to perform real work for the group.

TIP #3

Make fellowship a reality for everyone.

As noted above, when power is concentrated among only a few individuals, others can become distanced from the group’s work and may abandon it entirely. Work to prevent concentrations of power, or cliques, from forming. Rotate seating assignments at meetings to break up exclusive groups. Have a “meeting greeter” at each meeting who makes sure attendees are comfortable and engaged in the

process. Most importantly, work on leadership development so that new leaders are groomed and old ones step aside before they get burned out. Leadership development includes implementing term limits for leadership positions, creating a viable membership recruitment plan to bring in new volunteers, and communicating extensively and openly about the work of the group.

TIP #4

Help members form connections with one another.

It is hard to feel like part of a functioning group when you don't know anyone very well. To create group cohesion and better communication, work to build relationships among planning council and consortium members. Distribute a contact list so that members can communicate with one another. Make bios of the members available, recognize group members in the newsletter or on the website, and be sure to highlight their accomplishments on a regular basis. Create time for socializing and interaction at every meeting, either before or after the agenda, so that people can connect.

TIP #5

Communicate regularly with all members.

It is a fact of life in organizations: much of the work of the group occurs outside of regularly scheduled meetings. In addition, not every planning council or consortium member will be able to attend every meeting. This makes it vitally important to establish a process for making sure the group communicates effectively between meetings. E-mail and listservs are two easy ways to ensure that everyone knows what is happening in the group, what decisions are under consideration or have been made, what's on the upcoming agenda, and when the next meetings are. Phone calls to members who have missed meetings are another way to make sure everyone is engaged; they are also a way to check in and see if there are any problems that need to be addressed. Last but not least, a monthly newsletter or an update on the website can help to publicize the work of the group, both internally and to the broader public.



TIP #6

Learn what is working and what needs changing.

It is important to assess the group's functioning on a regular basis. Conducting an anonymous survey of group members will help identify any weaknesses in how group is working, as well as any changes that can be made to increase members' engagement and commitment. Assess how the recruitment process is working, how well meetings are functioning, how effective the group's work is as a whole, how included and connected volunteers feel, and what they think can be done to improve the way the planning council or consortium operates. Be sure to implement suggested changes so that participants feel a real stake in the operation and functioning of the group.



TIP #7

Show appreciation for members' hard work.

While people serve on planning councils and consortia for many reasons, all participants like to be thanked for the energy and effort they invest in the groups. Recognition may not be the main motivator for most volunteers, but it is always appreciated. Honor longtime group members on the anniversary of their membership. Create an award to thank those who make valuable contributions to the group's work. Send a thank-you letter to each member, as well as their organization, acknowledging their hard work and commitment to HIV/AIDS prevention.

TIP #8

Invigorate your programs and activities

It can be hard to remain engaged in a group whose work consists primarily of meetings. Planning councils and consortia should consider programs that give the membership a broader perspective on the group's work. Take trips to visit contractors and other service providers in your community. Invite guest speakers to attend meetings and discuss important and emerging issues. Bring in trainers and offer experiential sessions that draw people away from the meeting table to

build new skills. People serve on planning councils and consortia because they care about their communities. Help volunteers connect with service providers and others serving those living with HIV/AIDS.

TIP #9

Monitor departing members' reasons for leaving.

When members do leave, investigate what led them to take that step. Schedule an exit interview between the departing member and someone they trust from the group. As an alternative, you may want to use a survey to assess a person's reason for leaving, because some may be uncomfortable discussing their reasons (particularly if conflict was involved). Your goal should be to find out if the reason or reasons for leaving could have been prevented, and if any problems that come up in the exit interview are interfering with the group's functioning. Then, you can work to address those problems so that other members aren't likely to walk out as well.

TIP #10

Stay in touch with former members.

Individuals who leave planning councils or consortia are still valuable assets for the organizations. They can represent the entities in the community, help identify new volunteers, and may be interested in rejoining the group at some point. Keep them in the loop about key developments, and retain them on the planning council or consortium mailing list for materials, invitations to events and other updates.





Effectiveness: Your Ticket to Member Engagement

As noted elsewhere in this guide, the most important factor in recruiting volunteers and keeping them engaged in the work of your planning council is the overall functioning of the group. Is it known in the community as an effective entity? Do current and former members share a positive view of their experience with the group? Is the group's work conducted efficiently?

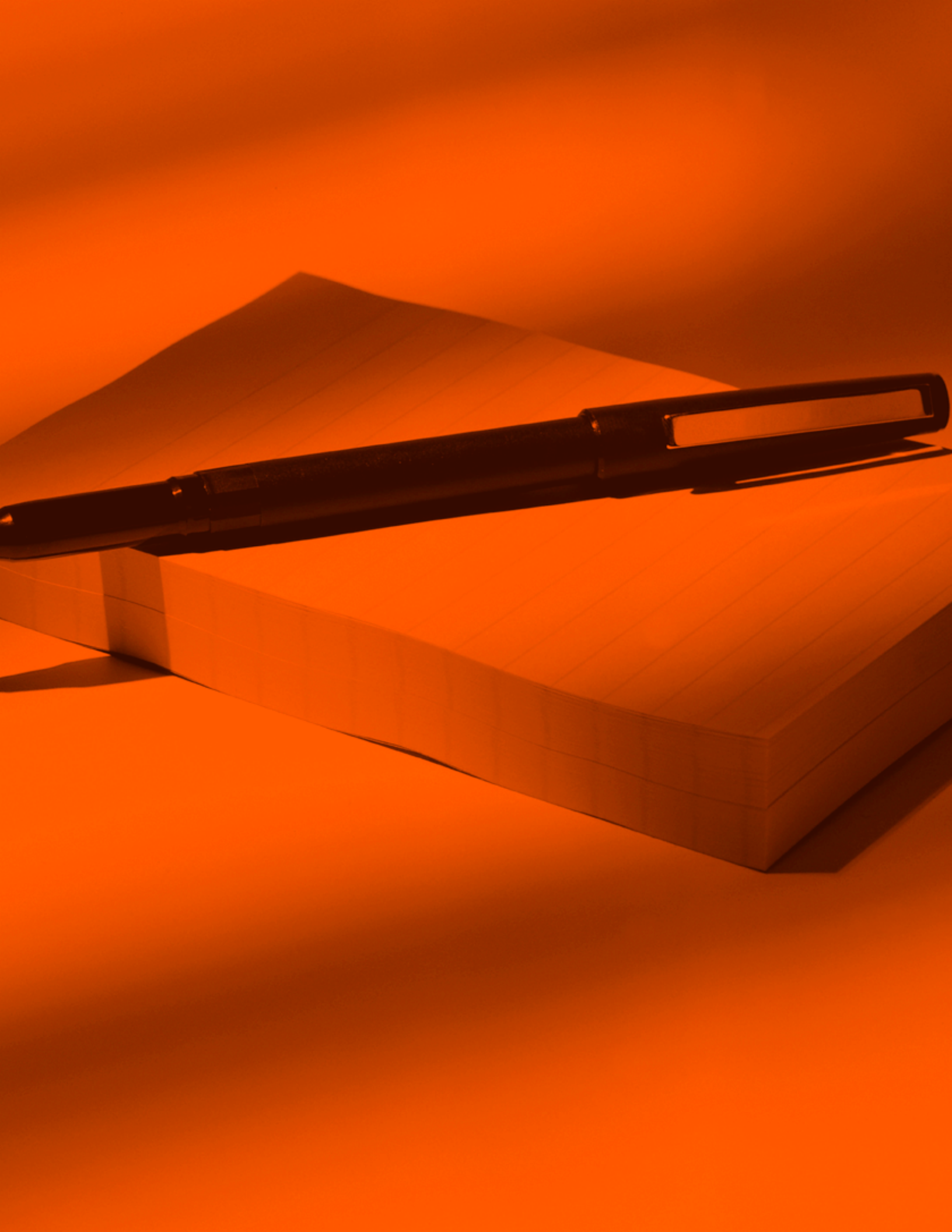
Looking at planning council and consortium operations objectively can help you see whether the group is appealing to potential members, and whether current members are able to remain enthusiastic and engaged. This type of evaluation also can help to identify problem areas you can work to address.

In the Appendices are some questions that will help you review planning council and consortium operations. Be as objective as possible when answering them—by understanding the group's weaknesses, you have a real opportunity to address factors that might lead volunteers to become disillusioned and leave the group. Meeting these challenges will increase the planning council or consortium's "curb appeal" and attract the kind of volunteers who will be most committed to the work of the group.

Areas for Concentration

Now that you have answered the questions in the appendices, make a list of areas that your planning council or consortium can focus on to improve recruitment, training or engagement:

You may want to set up a special committee to address these areas, or hold a meeting focused on these issues. However you decide to proceed, the good news is that you have a roadmap for making improvements that will enhance the work of the planning council or consortium.



Conclusion

This guide is designed to help Title I planning councils and Title II consortia recruit and retain members who will be committed to the work of the groups. In many cases, the problems and challenges that lead members to drop out of planning councils and consortia can be addressed—and prevented—through systematic efforts to recruit, train and engage group members.

These activities will help build stronger planning councils and consortia—groups that members will enjoy serving, and to which they will remain committed, well into the future. It may take some work, but the benefits of an engaged and informed membership are well worth the effort.

A stack of several books is shown, with an orange overlay covering the entire image. The books are stacked in a slightly irregular manner, with some pages visible. The text "Appendix: Worksheets" is overlaid on the books in white.

Appendix:
Worksheets

Use the worksheet below to assess whether any of the challenges noted in this section may be an issue for your planning council or consortium. If you answer “No” to any of the questions, it should indicate an area that your group needs to address in order to foster better member retention. The same may be true if you have trouble answering a particular question.

YES	NO	ASSESSING REASONS FOR DISSATISFACTION
		Do you have a packet of information about the planning council that is available for potential members?
		Is there an established training process for educating new and/or potential members about the group’s work and processes?
		Is there an established means for describing the group’s roles and responsibilities to new and potential members?
		Do you have an effective process to assess a member’s interest in the group’s work?
		Do you have a reliable estimate of the weekly and monthly time commitment of group membership?
		Do you inform new and potential members about this expected commitment?
		Is there an established process for making decisions?
		Do new members receive orientation and training in the group’s meeting procedures and decision-making processes?
		Do you offer trainings and other experiential activities throughout the year?
		Does the group strive to include all members in decision-making?
		Are major decisions routinely handled by the group at large or an Executive Committee (not a small group of “insiders”)?
		Is there an official process to develop new leaders?
		Are leadership positions term-limited?
		Are there “unspoken rules” that guide the group’s operations?
		Are all rules and processes applied consistently among group members?

ASSESSING REASONS FOR DISSATISFACTION worksheet

YES	NO	ASSESSING REASONS FOR DISSATISFACTION
		Does the group provide incentives to members such as day care, transportation reimbursements and food?
		Do you regularly assess group members' needs and challenges (e.g. child care, transit, meals)?
		Is there a regular schedule of meetings established for the year?
		Do meetings start and finish on time?
		Is it clear who is leading the meeting and presenting different topics?
		Is an agenda prepared and distributed in advance?
		Does the group have a policy protecting members' medical and personal confidentiality?
		Does the group allow members to take a leave of absence?
		Are there set processes to assess and support members who may be experiencing personal or other problems that hamper their ability to serve in the group?
		Does the group have an accurate estimate of the transportation and other costs associated with attending meetings?
		Do meetings alternate among day/evening and weekday/weekend times?
		Is the meeting site accessible by public transportation?
		Are members able to park nearby, if necessary?
		Is the facility accessible to those who are physically challenged?

Use the worksheet below to assess how well your planning council or consortium recruits new members. Any area where you do not check off “Yes” is a potential weakness. Consider creating a task force or designating someone to work on addressing the areas where your planning council or consortium answers “No”.

YES	NO	RECRUITMENT STRATEGIES
		Does your group have a clear recruitment process or plan in place?
		Do you provide current members with materials they can use to recruit new members?
		Do you distribute information about becoming a group member at meetings and other public events?
		Does the group hold membership development sessions and activities?
		Are meetings open to the public and/or potential members?
		Is there an established process for greeting and welcoming these individuals?
		Are there materials available that describe the group’s past work and future plans?
		Are prospective members linked with someone who can answer their questions and shepherd them through the process?
		Do you have a website that describes the group, its work and how to become a member?
		Does the group regularly communicate with the media about its accomplishments?
		Is there a member who acts as the group’s spokesperson with the media?
		Do you have signs, cards or buttons that invite people to ask current members about joining and/or supporting the group?
		Does the group have a reputation as being effective, organized and well run?

Use the worksheet below to assess how well your planning council or consortium trains its members. Any area where you do not check off "Yes" is a potential weakness. Consider creating a task force or designating someone to work on addressing the areas where your planning council or consortium answers "No".

YES	NO	TRAINING STRATEGIES
		Does the group hold a new member orientation and training?
		Do you query new members to gather information about their needs and interests?
		Has the group established an annual calendar with meeting dates for trainings, workshops, field visits to AIDS service organizations and other special events?
		Are trainings held to help members acquire skills and knowledge?
		Are trainings evaluated to assess their quality?

Use the worksheet below to assess how well your planning council or consortium engages its members. Any area where you do not check off “Yes” is a potential weakness. Consider creating a task force or designating someone to work on addressing the areas where your planning council or consortium answers “No”.

YES	NO	ENGAGEMENT STRATEGIES
		Does the group strive to make member retention a continual process?
		Are members involved in the day-to-day work of the group?
		Are responsibilities delegated among group members?
		Do mentors help new group members adjust to the group?
		Do all group members serve on at least one committee?
		Do all group members understand the work that is expected of them as part of the planning council or consortium?
		Does a meeting “greeter” welcome new and potential members at meetings?
		Does the group work to avoid cliques and groups-in-groups?
		Are leadership positions term-limited?
		Does the group communicate its plans and actions both internally and to the broader community?
		Are contact lists and bios maintained, updated and distributed to group members?
		Are regular opportunities for socializing incorporated into the meetings?
		Does the group use e-mail or a listserv to communicate with all members about events, decisions and upcoming events?
		Does the group reach out to members who have missed a certain number of meetings?
		Does the group create and distribute a regular newsletter highlighting its work and the contributions of individual members?

YES	NO	ENGAGEMENT STRATEGIES
		Does the planning council or consortium conduct a regular survey of members to assess group functioning?
		Does the group work to recognize and honor the hard work of members?
		Does the group act on suggestions for improvement?
		Does the group engage in activities other than meetings?
		Are exit interviews held with departing group members?
		Do former members continue to receive updates and other materials from the planning council or consortium?
		Do you have a mechanism for keeping former members engaged?

COMMUNITIES ADVOCATING
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