



HOUSING & BUILDING ASSOCIATION  
OF COLORADO SPRINGS

# MEMBER SERVICES COUNCIL PROCEDURE MANUAL

## MISSION STATEMENT

The Housing and Building Association of Colorado Springs is committed to promoting policies that allow for the production of safe, decent and affordable housing and to enhancing the environment for the housing and building industry in El Paso County.

## GUIDING PRINCIPLES

To Protect, Promote, and Support the membership of our Trade Association

## STRATEGIC PLAN

Increase, Retain and Engage Membership  
Address Leadership Development  
Identify and Implement Strategic Regulatory Influence  
Determine and Implement Optimal Political Influence  
Allocate appropriate resources to sustain financial stability

## **2010 Leadership Team**

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<b>Name &amp; Company</b>	<b>Role</b>	<b>Phone</b>	<b>Email</b>
Michael Law - Merrill Lynch	Council Chair	(719) 630-6049	mike_law@ml.com
Shelly Farmer - Heritage Title Company	Education	(719) 592-9933	sfarmer@heritagetco.com
Dawn White - Dawn White & Co.	Membership	(719) 271-8889	dawn@dawnwhiteandco.com
Amy Cox – Total Office Solutions	Events	(719) 327-5885	amy@toscs.net

### **HBA Staff Contacts:**

Shirley Rouse, Director of Member Services	(719) 592-1800 x 17	shirley@cshba.com
Renee Zentz, Executive Vice President	(719) 592-1800 x 15	renee@cshba.com
Kirk Standley, Events Manager	(719) 592-1800 x 14	kirk@cshba.com

# Colorado Springs Housing and Building Association (HBA)

## Member Services Council

### Council Procedure Manual

#### **Mission**

The Member Services Council is responsible for executing two strategic issues of the strategic plan, adopted by the Board of Directors, specifically the issues of “engage, retain and recruit members” and “leadership development”, in conjunction with other elements.

#### **Meetings**

Council meetings will be held monthly, including December. Meetings will be the first Thursday of each month from 8:30 a.m. till 10:00 a.m. Networking will be prior to and/or after each meeting.

#### **The Council**

The Chair of the Member Services Council is appointed by the President of the HBA and can serve no more than three (3) one-year terms. The Chair is a Member of the Executive Committee and therefore is a voting member of the Board of Directors.

Committee Vice-Chair positions are Education, Events and Membership. The Chair of the Member Services Council is selected by the President from the Committee Chair positions who have been actively involved in the Council for three years or longer.

#### **Responsibility of the Chair**

The Chair holds the Committee Chairs accountable for their assigned tasks (identified in this Manual). In addition, the Chair monitors the Association Members’ issues and represents their interest to the Executive Committee and the Board of Directors (BOD).

- Populate committees by choosing leaders, identifying participants
- Stress recruitment of new committee members and attendees
- Lead meetings
- Determine agenda content
- Identify and resolves issues:
  1. Get the people to the meeting to discuss issues
  2. Decide if action is needed
  3. Press for resolution or progress from sub-committees
  4. Arrive at a recommendation, best for the industry
  5. Implement action or makes a recommendation to the BOD for action
- Work directly with Staff to achieve the above
- Report to the Executive Committee and Board of Directors

#### **Responsibility of Committee Vice-Chairs**

There are three (3) Committee Vice-Chairs of the Member Services Council, with subcommittees under the Committee. Although the Committee Vice-Chairs are responsible for managing their particular task, the entire Council is responsible for implementing the policies identified by the Committee Vice-Chairs.

1. Membership
  - a. Retention
  - b. Recruitment
  - c. Recognition
2. Events
  - a. Trap Shoot
  - b. Rally Ride
  - c. Chili Wing Ding Brew Fest
  - d. Membership After Hours
  - e. Holiday Party
  - f. Other events as identified and approved by the Executive Committee and BOD

3. Education
  - a. General Membership Meetings
  - b. Review Member ideas
  - c. General education
  - d. Resource Center (HBA website)

### **Membership Committee Vice-Chair**

The Membership Committee Vice-Chair is managing the Membership policy and attracting Members to this subcommittee to assist with the following activities:

- Retention: Identify and implement the retention policy of the Association (page X)
- Recruitment: Identify and implement the recruitment policy of the Association (page X)
- Recognition: Identify and implement appropriate recognition programs and local awards for Spike Club Members (please see NAHB Spike Member outline on page X)
- A Council member will call on every new and renewing member.

### **Events Committee Vice-Chair**

The Events Committee Vice-Chair is responsible for managing the networking events of the Council and for attracting Members to this subcommittee to assist with planning and presentation of the following activities:

1. Member Benefits Overview /Orientation – held prior to Membership After Hours in 2010
2. Membership After Hours – identified throughout the year
3. Rally Ride (typically the 3<sup>rd</sup> weekend in July)
4. Chili Wing Ding Brewfest (3<sup>rd</sup> Wednesday in September)
5. Holiday Party (1<sup>st</sup> Wednesday in December)
6. Other events as identified and approved by the Executive Committee and BOD

*The event Vice-Chair is also responsible for securing sponsorships of their event. HBA Policy: All sponsors MUST be an active Member of the Association with no invoices more than 90 days past due.*

### **Education Committee Vice-Chair**

The Education Committee Vice-Chair is responsible for attracting Members to this subcommittee to assist with planning and presentation of the following activities:

1. Identify and work with Staff to schedule programs for General Membership Meetings that add value for our members
2. Vet education programs submitted by Members and outside parties to be held in the HBA conference room
3. Identify general educational programs for the Membership (i.e., applicable to a specific segment within the Association). This will also include a report out at the monthly meetings by the Remodelers Council and the Sales & Marketing Council. Some of the educational programs will be submitted by other HBA committees and Councils. I.E., Code Review Committee requesting an Erosion Control program.
4. Identify topics to be included on the *Resource Center* on the HBA website.

### **Staff Responsibilities**

- Coordinate mailings, budget, and meeting notices/minutes; liaison with other committees.
- Mail (hard copy or electronic) membership applications to potential members. Follow up for questions until the potential member has joined or said no.
- Coordinate with and provide support to subcommittees
- Assist subcommittees with needed tasks
- **Conduct membership orientations – coordinate with other Staff or Committees to participate.**
- Follow up on outstanding invoices
- Ensure that sponsorship dollars are paid at least 7 days prior to the event or withhold Members' sponsorship of that event.

**Outline of Agendas:**

Approval of previous month's minutes

Board Report – Chair

Membership Report – Committee Chair

Events Report – Committee Chair

Education Report – Committee Chair

Affiliate Reports

    Remodelers Council report

    Sales & Marketing Council report

New Business

# **Membership Retention, Recruitment & Recognition**

## **Retention Subcommittee**

Develops and implements the membership retention program. The Council recognizes that retention begins the day a member joins and that involvement and value are the keys to member satisfaction and retention. *They call on every new and renewing member.*

### *Committee:*

1. Member Services Council will contact all new members within 45 days of Board approval. They will welcome the new member into the Association and arrange to meet with them to deliver the Membership Directory and get to know the new member.
2. The Member Services Council will contact all members at month 6 of their membership.
3. The Member Services Council will contact all expired members at 120 days. The spike credit for those who renew will be reassigned to that Council person.

### *Staff:*

4. The Director of Member Services will contact all new members within 3 days of Board Approval to let them know that their Membership was approved by the Board – when time allows.
5. The Director of Member Services will contact all members during their grace period and after their membership has been cancelled.

During any retention call, do not wait for the monthly meeting to provide feedback to the Director of Member Services (Shirley Rouse – (719) 592-1800, ext 17 or email [Shirley@cshba.com](mailto:Shirley@cshba.com)) for:

- Members with questions/concerns you cannot address
- Members who do not feel they are getting value for their investment
- Members who require follow-up on your calls

## **Recruitment Subcommittee**

### *Committee:*

1. Council Members will .....

### *Staff:*

2. The Director of Member Services will send information to prospective members identified through various channels and follow up with prospective members.
3. The Director of Member Services will provide a list of new prospective Members to the Committee Chair for distribution to the Member Services Council.

## **Recognition (Spike Club) Policy**

The Recognition Committee Chair oversees the recruiter recognition program.

1. Recruit new Spike candidates
2. Promote the NAHB spike program
3. Recognize Spikes as they move up the Spike ladder
4. Promote Spikes and membership drives throughout the Association and
5. Identifies the appropriate Spike recognition (i.e, Spike Party, vacation, points)

# **Events Procedures**

## **Membership after Hours**

Membership after Hours is an opportunity for HBA members to network with one another in a fun, relaxing environment. Having an event at a Members facility will allow other HBA members to get to know the Member, their company, employees/associates, and the products and/or services they offer.

Events are typically held the second Wednesday of the month from 5:30 to 7:30 p.m. when no large event is being held (i.e., Parade of Homes VIP Party, Chili Wing Ding Brew Fest, Holiday Party). See the Interest Form for more information.

## **Trap Shoot**

The Trap Shoot is held each May, usually at the Isaac Walton Gun Club. Trap shooting is one of the three major forms of competitive clay pigeon shooting (shotgun shooting at clay target). The chair is responsible for oversight of this event. Please see the time line for this event.

## **Rally Ride**

The Rally Ride and Poker Run is held each July. The event is not limited to motor cycles only; Members and their guests are encouraged to drive up in any mode of transportation. Participants leave from a designation location around 8:00 a.m. and have at 3-4 "poker stops" along the way. There is a luncheon at the end point and planned activities throughout the day. Participants may stay over night or return home that day. The chair is responsible for oversight of this event. Please see the time line for this event.

## **Chili Wing Ding Brew Fest**

The Chili Wing Ding Brew Fest (aka "Chili Cook Off") is held the third Wednesday in September. Members of the HBA cook red or green chili, desserts, and chicken wings. Members and their guests attend the event. Each chili participant is judged on the red chili, green chili, wings, desserts, presentation, and best of show. The chair is responsible for oversight of this event. Please see the time line for this event.

## **Holiday Party**

The Holiday Party is held the first Wednesday in December and is a time to celebrate the holidays with Members and their guests. The chair is responsible for oversight of this event. Please see the time line for this event.

# Education Procedures

Identify and work with the Director of Member Services to schedule and promote educational programs.

## General Membership Meetings

General Membership events are applicable to all members. Scheduled programs for General Membership Meetings (GMM) must add value to the Members' bottom line. In some instances, programs will come from other sectors of the HBA. For instance, the Political Action Committee (PAC) may request a GMM to promote/support endorsed candidates or to raise funds for the PAC.

When talking with the Membership at events and during retention calls, ideas for GMMs will occur.

## Review Ideas

The HBA has a wealth of resources within its membership. Members who approach the HBA with educational opportunities must provide an outline of the program and the costs associated with the program. The Educational Subcommittee will take all ideas under consideration and make a recommendation to the Council.

The subcommittee will then work with the Director of Member Services to arrive at a budget for the program. The Director of Member Services will prepare the event flyers, arrange for promotion of the event, and schedule the HBA conference room.

Please note: The HBA conference room is available for rental to our Members on an hourly basis. They may either rent the room for a nominal fee with no HBA promotion of the room, or they may rent the room at a higher fee with HBA assistance in advertising and promotion of the event. Once the Member rents the room, the Member takes all registrations and can either charge for the event or offer it for free.

When Members submit ideas to the HBA, it is the responsibility of this subcommittee to decide which programs fall under the purview of HBA education programs and which ones fall under the rental policy.

## Education Programs

Educational programs are targeted to a specific sector of the Association. For example, the Code Review Committee may request a program on new codes or Land Use may request a meeting on erosion control. The Director of Member Services will apprise the Education subcommittee on the program will schedule the HBA conference room time, promote the event through printed materials (event flyers, Friday e-mail/Friday fax, blast emails, and The HOMEFRONT when possible) and arrange for other needed resources. Members of the subcommittee will be responsible for promoting the event through word of mouth.

A cooperative program is established with Lorman Educational Services ([www.lorman.com](http://www.lorman.com)). HBA Members receive a discount on all Lorman programs when they register using the below priority code and discount code.

Seminar ID: Per Web site  
Priority Code: 16018  
Discount Code: J9194

## HBA Welcome Visit



Company/Business: \_\_\_\_\_

Name: \_\_\_\_\_ Date \_\_\_\_\_

HBA Ambassador \_\_\_\_\_

### **This is a personal visit**

- ✓ Bring them a membership directory
- ✓ Bring them HBA decals
- ✓ Get acquainted with them; welcome them to the Association

### **Suggested 3 – 5 questions:**

1. Tell me about your company. Listen attentively
2. Why did you join the Association? (then direct the conversation to how the Association can benefit them)
3. Have you attended an Orientation yet?
  - a. If yes, “great, what were the main points you got out of it?” then direct them to how the Association can benefit them
  - b. If no “Orientation is a great way to find out how you can get the most out of your investment in the Association. Our next one is scheduled for \_\_\_\_\_”
4. Is there a Committee or Council that you’d like to join? (make sure you have a committee or Council sheet with you / point them to our website)
5. Do you have any hobbies or interests? Listen attentively and then reference HBA events or issues. Golf, poker run, politics, etc.
6. Have you heard about our upcoming events? (Name a couple of events with the dates)

This form is kept for your reference only!



## HBA Retention Call

The purpose of the retention call – made at month 6 of their membership (no invoice has been sent) – is to check in and see how they are doing.

I just call and say “Hello, this is Shirley from the Housing & Building Association in Colorado Springs. This is just a check-up call to see how things are going and if there is anything I can help you with.”

You can then also ask them any of the following questions:

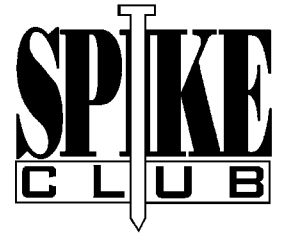
1. Are you getting the information from the HBA? weekly email? The HOMEFRONT?
2. Are you involved on any committee or Council?  
If no – would you like to be?  
If yes, discuss the various committees & Councils that may be of interest to them
3. Are there any particular business concerns that the HBA could help address?
4. Are you getting the most from your HBA membership?  
If no, is there something you can help them with?
5. Have you heard about our upcoming events? (Name a couple of events with the dates)

Ambassador Name: \_\_\_\_\_ Date contacted: \_\_\_\_\_

Ambassador comments:

This report is for your use only. However, please report comments of concern to the HBA as soon as possible.  
Shirley Rouse, Director of Member Services      719-592-1800, ext 17 or email Shirley@cshba.com

**Becoming a Spike.** Before becoming a Spike, you are a Spike candidate. That means you have earned between one and five Spike credits. Once you earn your sixth Spike credit, you become an official NAHB Spike providing you have earned those six credits within two consecutive membership years. Spike credits are earned by recruiting and retaining NAHB and Council members.



To retain your status as a Spike you must earn a minimum of one Spike credit (new or retention) each year until you reach a total of 25 credits, at which point you are elevated to Life Spike status.

**Earning Spike Credits.** Members earn one Spike credit for each new member they sponsor. When that member renews after his or her first year of membership the sponsoring member automatically gets one retention credit. Every year the member renews thereafter, the sponsoring member will receive a 1/2 renewal credit.

For Affiliate members, Spikes receive a 1/2 credit for recruiting them and a 1/2 credit for renewing them. These credits count toward achieving and maintaining Spike status, but do not count toward Spike Party invitations.

*Note: Double Spike credits are awarded during the month of National Membership Day and for Membership Drives when NAHB is notified in advance.*

**Recruiting and Retaining Members.** When the [Sales & Marketing or Remodelers] Council membership is activated in conjunction with a new NAHB membership, the recruiter earns a 1/2 credit, and when that member renews his or her council membership, you earn 1/4 retention credit.

Note: Credits earned for recruiting and retaining (SMC and Remodelers) Council members do not qualify you for Spike status or for the Spike Party, but they do count toward your total credit accumulation.

You must be a Spike in good standing as of October 31 (having at least 6 credits) and you must have earned at least one new member credit from January 1 through October 31 to receive an invitation to the Spike Party at the NAHB conference.

**Changing Spike Sponsors.** When the Member renews their membership, the sponsor receives Spike Credits as identified above (Earning Spike Credits). However, if during a retention call, a HBA Member tells the Retention Committee Member that they will not be renewing, and the Retention Committee Member changes their mind and gets the Member to renew, the sponsor will be changed from the original sponsor to the Retention Committee Member.

*Note: The Retention Committee Member must put it in writing to the Director of Member Services and state how they were able to get the Member to recommit before the sponsor can be changed.*

**Spike Benefits.** The real benefits are intangible—you will be recognized for your contributions to the association and regarded as an accomplished and connected member. Additionally, Spikes receive:

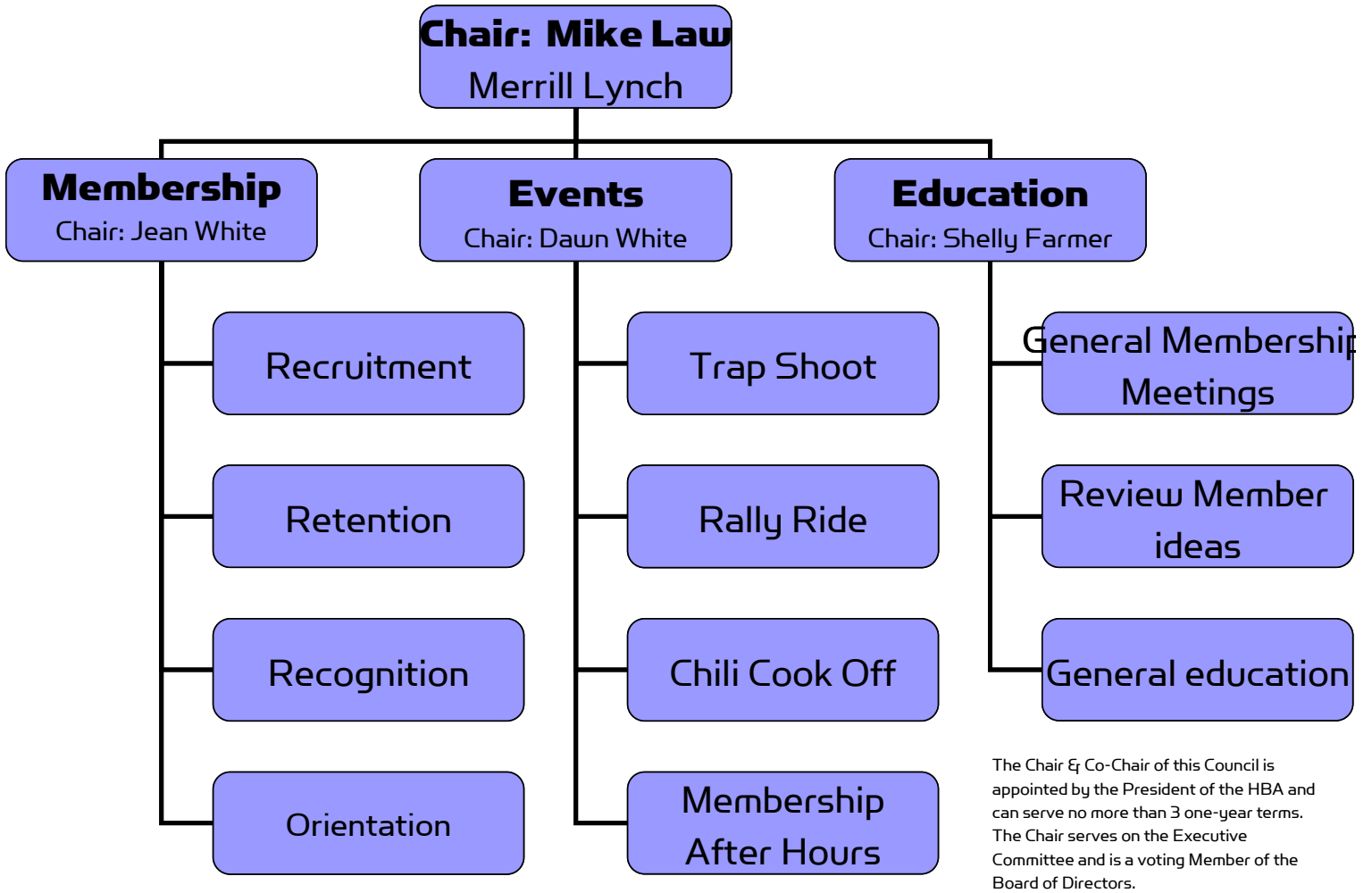
- A coveted invitation to the biggest party of the year, the Spike Party/Directors Reception\*
- Increased visibility, recognition, and networking opportunities at industry events
- Unique and valuable rewards for each level of achievement, including lapel pins, plaques, trophies, wearables, jewelry, and more
- Additional VIP treatment throughout the year at local and national events

\*Invitations are sent only to eligible Spikes who have recruited at least one new member during the year.

NAHB will send notices of spike level changes on a monthly basis. This will be forwarded to the Spike Member upon receipt.

**Member Services Council  
Organization Chart**

# Member Services Council



It is important to note that while you may Chair a particular activity within the Council, everyone participates in all of the activities of the Council.