The American Physical Therapy Association (APTA) works diligently to protect and advance the physical therapy profession from the many changes and challenges that the profession faces today. APTA leaders are committed to ensuring a healthy future for the profession, APTA members, and consumers of physical therapy services.

APTA’s effectiveness in protecting and advancing the profession comes from the more than 66,000 members who support the Association through their annual membership dues and their involvement in APTA activities.

But APTA’s efforts are only as effective as its membership is strong. When APTA experienced significant declines in membership in the late 1990s, the Board of Directors showed their commitment to membership development by appointing a Task Force on Membership Development in 1998. The Task Force was re-appointed annually and was recently replaced by an Advisory Panel on Member Recruitment and Retention. The purpose of this Advisory Panel is to provide advice and counsel to the Board of Directors on internal and external factors that affect members’ and prospective members’ decisions to join the Association and/or maintain membership. Key tasks of the Advisory Panel include:

- To review and make recommendations regarding APTA’s Strategic Plan for Membership Development, an action plan that provides APTA and its components with clear direction for membership recruitment and retention activities.
- Monitor, evaluate, and recommend activities and initiatives to support positive member relations and member satisfaction.

Today membership is growing and membership development remains a top priority in 2005. As a result, APTA continues to be committed to the Strategic Plan for Membership Development, which has been revised to include updates and further recommendations from the newly Board-appointed Advisory Panel on Member Recruitment and Retention. Many of APTA’s membership development efforts in the coming years will continue to focus on informing current and prospective members about the value of membership and the many activities that APTA carries out on behalf of the entire profession. In addition, APTA will renew efforts to provide ongoing education to component leaders regarding the fundamental strategies of the Strategic Plan for Membership Development.

The key messages of APTA’s recruitment and retention efforts in the coming years will focus on specific interests or practice areas. Targeting messages to an individual’s interests will be critical as APTA continues efforts to boost renewal rates and build membership. In addition, members will be reminded and educated about professionalism and what it means to be a professional. Maintaining membership in the Association is a critical component of professionalism, as defined by APTA’s Vision Statement for 2020.
Strategic Plan for Membership Development
(2005-2007)

Membership development—which entails both recruitment and retention—remains one of the highest priorities of the American Physical Therapy Association. Currently, the national office and many of APTA’s components adhere to the Strategic Plan for Membership Development, which was originally adopted by the Board of Directors in 1999. This document, which is a work in progress, evolves as APTA and its components move forward in their membership development efforts.

The Strategic Plan for Membership Development (2005-2007) outlines strategies to meet APTA’s membership development goals and objectives. The underlying premise of this Plan remains the same since its inception—the most effective recruitment and retention efforts take place at the grassroots level. APTA will continue to work closely with its components to coordinate membership development efforts to achieve positive results in recruitment and retention.

In March 2005, the Board of Directors adopted the Advisory Panel’s recommendations to enhance the Strategic Plan by updating membership goals for target audiences and modifying target audiences for membership development initiatives, key messages, and appropriate mediums for communication.

By incorporating this information into the action items and objectives outlined in the Strategic Plan, the national office and components can better target their messages to key audiences—thereby communicating more effectively and enhancing current membership efforts. The Plan also contains key membership development tasks for association leaders, volunteers, members, and staff.

The Board is grateful for the efforts of the Advisory Panel on Member Recruitment and Retention (2004), which contributed significantly to this integrated Plan for Board review and approval:

Chris Junkins, PTA—PTA Representative (SC)
Stuart Katzman, PT—Treasurer (CA)
Nichole Spake, PT—Membership Chair (KS)
Barbara Sullivan, PT—Chapter President (IL)
Debbie Lowenthal—Component Executive (TN)
Pauline Flesch, PT, MPS—Board Liaison

Overview of the Environment

Growth Rates

APTA’s membership has experienced peaks and valleys over the years. In the mid 1990s, APTA experienced significant growth in membership and grew to more than 75,000 in 1997. However, once the effects of the Balanced Budget Act of 1997 were felt, membership declined sharply to just over 63,000. After several years of declines, APTA finally began to experience an upward trend in membership in 2003. This trend continued in 2004.
At the end of 2004, total membership was up by 4.01% when membership figures were compared to the same time in 2003. Physical therapist membership was up by 2.97%, physical therapist assistant membership was up by 2.11%, and student membership was up by 10.04% from this time last year. Within the PT membership category, "PT Full" (physical therapists paying full dues) membership had increased by 5.78%.

In 2004, most components recognized gains in membership. At year end, 44 chapters and 13 sections experienced growth in overall membership. The Utah Chapter recognized the largest growth among chapters with an increase of 15.34% and the Neurology Section recognized the largest growth among sections with an increase of 8.73%.
## Membership Totals by Category*


<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>PTs</td>
<td>45,262</td>
<td>47,332</td>
<td>48,220</td>
<td>49,232</td>
<td>50,172</td>
<td>49,850</td>
<td>47,392</td>
<td>46,994</td>
<td>46,750</td>
<td>47,283</td>
<td>49,246</td>
<td>50,712</td>
</tr>
<tr>
<td>PTAs</td>
<td>4,552</td>
<td>5,679</td>
<td>6,437</td>
<td>7,269</td>
<td>8,079</td>
<td>7,829</td>
<td>6,363</td>
<td>5,525</td>
<td>5,098</td>
<td>4,565</td>
<td>4,418</td>
<td>4,511</td>
</tr>
<tr>
<td>Students</td>
<td>11,335</td>
<td>13,126</td>
<td>14,222</td>
<td>15,682</td>
<td>16,778</td>
<td>15,501</td>
<td>13,987</td>
<td>12,263</td>
<td>11,257</td>
<td>9,891</td>
<td>10,883</td>
<td></td>
</tr>
<tr>
<td>Total Membership</td>
<td>61,149</td>
<td>66,154</td>
<td>68,879</td>
<td>72,183</td>
<td>75,029</td>
<td>74,582</td>
<td>69,256</td>
<td>66,506</td>
<td>64,111</td>
<td>63,105</td>
<td>63,555</td>
<td>66,106</td>
</tr>
</tbody>
</table>

*Figures represent year-end totals and do not include honorary member category (nominal).

During the past few years, APTA has recognized an upward trend in renewal rates for physical therapists and physical therapist assistants.

## Renewal Rates by Category


<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>PTs</td>
<td>83%</td>
<td>83%</td>
<td>80%</td>
<td>79%</td>
<td>79%</td>
<td>76%</td>
<td>71%</td>
<td>76%</td>
<td>76%</td>
<td>78%</td>
<td>80%</td>
<td>80%</td>
</tr>
<tr>
<td>PTAs</td>
<td>74%</td>
<td>71%</td>
<td>68%</td>
<td>67%</td>
<td>66%</td>
<td>59%</td>
<td>48%</td>
<td>54%</td>
<td>61%</td>
<td>63%</td>
<td>66%</td>
<td>69%</td>
</tr>
</tbody>
</table>

Because student retention rates are linked to the Career Starter Dues (CSD) program, presentation of these rates is considerably more complex than is presentation of renewal information for physical therapist and physical therapist assistant members. Adding to this complexity is the fact that the CSD program and the length of student membership have changed many times in the past 10 years. Previously, new graduates were eligible to pay one third of dues after graduation and then two thirds dues the second year after graduation. Student membership expired the month of graduation, so eligible students had a specific window of time in which to renew at the one-third dues rate. The current CSD program entitles new graduates to pay one half of dues at renewal time. Student membership now runs for a full year, so it may or may not end with the month of graduation. New graduates have 30 days after their membership renewal date to take advantage of one half dues. The second year, they pay full dues.

It's important to note that student membership and Career Starter Dues figures include only entry-level students. Transition-DPT students are included among the “PT Full” membership category and students that have returned to school full-time for a post-professional degree are included among the Active-Student membership category.

The following table summarizes the student conversion rates associated with the Career Starter Dues program.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>PT</td>
<td>4,390</td>
<td>1,569</td>
<td>4,644</td>
<td>2,061</td>
<td>4,992</td>
<td>2,347</td>
<td>5,041</td>
<td>2,679</td>
<td>5,463</td>
<td>2,989</td>
<td>6,010</td>
<td>3,101</td>
<td>6,191</td>
<td>2,702</td>
<td>5,744</td>
<td>2,013</td>
<td>5,761</td>
<td>1,668</td>
<td>5,169</td>
<td>1,074</td>
<td>4,077</td>
<td>969</td>
</tr>
<tr>
<td>PTA</td>
<td>2,909</td>
<td>1,569</td>
<td>4,644</td>
<td>2,061</td>
<td>4,992</td>
<td>2,347</td>
<td>5,041</td>
<td>2,679</td>
<td>5,463</td>
<td>2,989</td>
<td>6,010</td>
<td>3,101</td>
<td>6,191</td>
<td>2,702</td>
<td>5,744</td>
<td>2,013</td>
<td>5,761</td>
<td>1,668</td>
<td>5,169</td>
<td>1,074</td>
<td>4,077</td>
<td>969</td>
</tr>
<tr>
<td>Grad Rate</td>
<td>66%</td>
<td>60%</td>
<td>65%</td>
<td>63%</td>
<td>69%</td>
<td>60%</td>
<td>69%</td>
<td>60%</td>
<td>67%</td>
<td>56%</td>
<td>64%</td>
<td>64%</td>
<td>46%</td>
<td>66%</td>
<td>51%</td>
<td>59%</td>
<td>44%</td>
<td>60%</td>
<td>40%</td>
<td>48%</td>
<td>31%</td>
<td>66%</td>
</tr>
</tbody>
</table>
The following table summarizes the data available regarding renewal rates of members taking advantage of the current CSD program.

<table>
<thead>
<tr>
<th>Grad Year</th>
<th>2004 PT</th>
<th>2004 PTA</th>
</tr>
</thead>
<tbody>
<tr>
<td># Grad</td>
<td>4,620</td>
<td>1,235</td>
</tr>
<tr>
<td># Tran</td>
<td>1,422</td>
<td>202</td>
</tr>
<tr>
<td>% at 1/2</td>
<td>31%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Membership Dues

In January 2005, APTA increased national dues for physical therapists to $265. This was the first increase in national dues for physical therapist members since 1997. National dues for physical therapist assistants increased to $180 in 2005. Student dues increased to $80. Chapter dues range from $20 to $245 for physical therapists, from $10 to $156 for physical therapist assistants, $0 to $25 for students, and $0 to $140 for active-student members. According to APTA bylaws, national dues increases also will go into effect for physical therapists and physical therapists assistants in 2007 and 2009.

An analysis of market share conducted by APTA’s Research Services Department in December 2004 concluded that there appears to be a relationship between amount of chapter dues and market share. However, perceived value of membership has a bigger effect on market share than does the amount of chapter dues.
Vision Statement
By 2020, physical therapy will be provided by physical therapists who are doctors of physical therapy, recognized by consumers and other health care professionals as practitioners of choice to whom consumers have direct access for the diagnosis of, interventions for, and prevention of impairments, functional limitations, and disabilities related to movement, function, and health.

In 2005, APTA will continue efforts with vigor to work toward this vision, which includes the following components: direct access, practitioner of choice, evidence-based practice, professionalism, doctorate of physical therapy, and autonomous practice.

Member Opinion Survey
A member satisfaction survey was conducted in November 2004. The survey was conducted in a way that allowed APTA to share specific results with each chapter. In addition, the questionnaire was similar to that used in 2003, so that results could be compared easily to see if members’ attitudes and perceptions had changed. In general, the survey results were positive. Respondents indicated that they are satisfied with the services and value offered by both the chapter and the national office.

Survey respondents identified reimbursement for physical therapist services, repeal of the Medicare therapy cap, direct access under Medicare, and practice act revisions or protection as important. Among benefits perceived as valuable were advocacy for reimbursement and accreditation. Survey respondents also were asked to identify scenarios that would affect their likelihood to renew. The scenario associated with the highest likelihood to renew related to receiving two to three hours of free continuing education. The scenario leading to the lowest likelihood of renewal was one in which the respondent was no longer practicing as a physical therapist. Overall, those respondents who were likely to renew expressed more positive opinions about the value of dues and satisfaction with service than did those respondents who were less likely to renew.

Former Member Survey
In November 2004, APTA also conducted a survey of former members. Survey questions were similar to those asked in the member satisfaction survey so that results, opinions, and perceptions could be compared. Approximately one quarter of respondents indicated that they received good value for national and chapter dues. Nearly 50% of respondents indicated some level of satisfaction with customer service at the national and chapter levels.

Respondents identified the following issues as important: reimbursement for physical therapist services, repeal of the Medicare therapy cap, supply/demand of physical therapists, practice act revisions or protection, and direct access under Medicare. Among benefits perceived valuable by lapsed members were accreditation of physical therapy education programs and advocacy for reimbursement.

Interestingly, more than half of the respondents indicated that they were likely or very likely to rejoin APTA. Nearly three quarters of respondents cited issues related to dues as the primary reason that they are no longer members of the Association. Respondents also indicated that they would be most likely to renew if their employers paid their dues or dues were reduced. The inclusion of 2 to 3 hours of free continuing education also led to higher likelihood of renewal.
Generational Issues

In 2004, the Board of Directors met with experts to discuss the potential effects generational differences may have on APTA membership. Currently, 4 generations of employees can be found in the workplace, and, subsequently, within APTA membership. Because each generation exhibits different behaviors, attitudes, and perceptions, it is important for APTA to respond to the needs of each generation.

Analysis of current membership shows that APTA’s physical therapist membership consists of 6.76% of Traditionalists (born prior to 1946), 42.23% of Baby Boomers (born 1946-1964), 50.94% of Generation Xers (born 1965-1981), and 0.07% of Millennials (born 1982-2000). APTA’s physical therapist assistant membership consists of 1.71% of Traditionalists, 39.43% of Baby Boomers, 54.57% of Generation Xers, and 4.3% of Millennials. Student membership consists of 4.11% of Baby Boomers, 73.04% of Generation Xers, and 22.6% of Millennials.

In comparison, the breakdown of physical therapists who lapsed membership between 1999 and 2004 consists of 3.26% of Traditionalists, 21.37% of Baby Boomers, 75.33% of Generation Xers, and 0.04% of Millennials. Former physical therapist assistant members consist of 1.40% of Traditionalists, 25.26% of Baby Boomers, 71.99% of Generation Xers, and 1.35% of Millennials.

In 2004, renewal rates varied among the generations as well. Among “PT Fulls” (physical therapists paying full dues), the breakdown of renewal rate by generation was as follows: Traditionalists—84.9%; Baby Boomers—85.67%, and Generation Xers—74.6%. In comparison, the overall renewal rate for “PT Fulls” was 80%. The breakdown of renewal rates for “PTA Fulls” by generation was as follows: Traditionalists—77.14%; Baby Boomers—73.51%; Generation Xers—66.15%. In comparison, the overall renewal rate for “PTA Fulls” was 69%.

Association leaders could benefit from similar conversations about generational differences within their chapters and sections, if they haven’t already done so. A good resource is When Generations Collide by Lynne C Lancaster and David Stillman, who presented during APTA’s Annual Conference in 2004.

Membership Development Goals and Objectives

The American Physical Therapy Association has recognized the importance of membership development as reflected in the following 2005 Goal and Objectives:

Goal VI: Communication throughout the Association enhances participation and responsiveness to members and promotes and instills the value of belonging to APTA.

Objective A: Implement Association communications that effectively match target audiences, key messages, and appropriate mediums.
Objective B: Develop and implement strategies to increase membership in the Association.

Objective C: Develop and implement strategies to promote members’ active involvement in professional association activities.

In addition, in May 2003, President Ben F Massey, Jr, PT, MA, set a membership goal of increasing “PT Full” membership by 10% by the time his term ends in May 2006. (PT “Full” membership refers to those members who pay full dues.) At this time, APTA continues working toward achieving this goal.

“PT Full” Membership as of 5/31/03 – 38,815
10% Goal – 3,881 for a total of 42,696
“PT Full Membership as of 12/31/04 – 42,571

The Board of Directors approved specific membership goals for target membership groups based on previous membership statistics. Following are goals adopted by the Board of Directors.

Acute Care Practitioners
Goal: To increase membership within the acute care practice setting by 1% for physical therapist membership and 1% for physical therapist assistant membership by the end of 2005.

Current demographics show that members in an acute care setting represent approximately 14.2% of PT membership and 11.2% of PTA membership. Two factors were taken into account as these goals were set: membership statistics of the Acute Care Section and the results of past direct mail campaigns targeted at acute care practitioners. For the past 3 years, the Acute Care Section has recognized declines in overall membership. In addition, response rates to mailings directed at acute care practitioners have generated lower responses than other APTA direct mail campaigns. For these reasons, modest goals were set.

Clinical Instructors
Goal: To increase membership among clinical instructors by 2% by the end of 2005. (Analysis of information regarding credentialed clinical instructors shows that approximately 28% of those credentialed belong to the Association.)

This goal, seemingly low in comparison to the “PT Full” goal of 10%, was based on results of previous membership campaigns targeted at clinical instructors. Response rates to these campaigns were modest in comparison to other APTA direct mail campaigns. These results indicate that convincing clinical instructors to join the Association is a much harder sell than other group. For this reason, the Board of Directors adopted modest recruitment goals for this group.

Key Strategies for Achieving Objectives
The following key strategies will be used throughout the Plan period as a means of achieving the objectives:

- Foster congruent efforts between APTA national and the components via the following:
  - Share existing and new data between and among APTA and the components;
  - Conduct national/component forums for regular and ongoing discussions of membership development issues; and
  - Share membership development ideas and materials via coordinated and regular communications with component presidents, membership chairs, and executives.

- Enhance volunteer participation in membership development efforts by identifying appropriate volunteers, orienting them, motivating them, and providing them with information and tools to carry out peer-to-peer development activities.

- Survey APTA members every other year to determine degree of satisfaction with national and component memberships and to derive appropriate information regarding how to improve satisfaction and enhance responsiveness to member needs.

- Survey eligible nonmembers, as resources allow, to determine perceptions, needs, and messages that are most likely to motivate them to join.

- Evaluate and report the results of various membership development initiatives.

- Increase communication with members about APTA activities, so that members are informed and knowledgeable about what APTA does on their behalf.

- Continue educational efforts focusing on the fundamentals of recruitment and retention. Consider generational issues when developing targeted membership development efforts.

Membership Development Initiatives Timeline

Plan Year 2005
As national, chapters, and sections focus on the fundamentals of membership recruitment and retention, the emphasis in 2005 continues to be communication, education, and consensus-building regarding membership development. National, chapters, and sections can all benefit from the following initiatives. For detailed listings of 2005 activities, see Action Items at the National Level, Action Items at the Component Level, and the summaries of specific communications with various member and nonmember groups outlined in Tables 1 through 7.

The following initiatives will be undertaken in 2005:

- Educate current and prospective members about the importance of professionalism and how it relates to membership in their professional Association.

- Continue to educate members about Vision 2020, how it relates to their practice, and why it is important to them.

- Ensure that all components offer core benefits and core standards to their members.

- Renew efforts to educate component leaders about the fundamental strategies outlined in the Strategic Plan for Membership Development. Education must be ongoing as component leaders change frequently.

- Make the national Web site a more effective recruitment and retention tool.

- Continue to collect and share prospect information from all appropriate internal and external sources in APTA’s centralized database, and share information with components.

- Continue to identify target audiences and promote appropriate messages about APTA membership.

- Focus on performing the key tasks identified by the Advisory Panel on Member Recruitment and Retention, if time, resources, and volunteers are limited.

- Evaluate and report on the effectiveness of all membership development initiatives.

- Emphasize collaboration between national and components and also between chapters and sections.

- Learn more about the needs of APTA members and consider the affect of generational issues on membership development efforts.
Plan Year 2006
The focus in 2006 remains on continuing the education of component leaders and volunteers. As new members enter leadership roles, it is essential that they have the means to continue effective membership development efforts. APTA also will continue its efforts to promote professionalism among members and prospective members and identify and offer members the services they need from their professional association.
- Continue and refine regular and coordinated communications with component presidents, membership chairs, and executives as a means of sharing membership development ideas and materials.
- Conduct nationwide member satisfaction and former member surveys to derive information regarding how to improve satisfaction and enhance responsiveness to member needs. Share results with components.
- Evaluate and report on the effectiveness of all membership development activities.
- Continue efforts to enhance professionalism among current and prospective members.
- Build upon efforts to appeal to members within the various generations that make up APTA membership.
- Investigate the feasibility of offering a training workshop for component membership chairs.

Plan Year 2007
The focus in 2007 is building on the capabilities of APTA’s database and technical support to allow for a greater understanding of who our members are and what motivates them, and to enhance our ability to implement “mass customization” techniques.
- Expand the capabilities of APTA’s centralized database to allow for the following:
  - Tracking information that demonstrates the value a member has received from the Association;
  - Ranking members and customers by the total annual amount of money they spend on Association dues, products, and/or services and using these data to better focus marketing efforts;
  - Tracking activity that contributes to an understanding of the member’s lifetime value to the Association;
  - Creating individual profiles (e.g., interests based on purchasing and attendance histories, preferences regarding mode of communication, factors and/or messages that are likely to motivate action); and
  - Identifying who is at risk for nonrenewal.
- Identify ways in which to recruit new customers into the Association with the understanding that not everyone will join the Association; however, they may purchase APTA products and services.
- Continue efforts to enhance professionalism among current and prospective members and to reinforce the value and importance of membership.
- Evaluate and report on the effectiveness of all membership development activities.
- Implement actions that appeal to members’ special interests by ensuring collaboration between chapters and sections.

Action Items at the National Level
Actions taken at the national level to help advance the Strategic Plan for Membership Development are directed to supporting a strong relationship between APTA and its chapters. Each of the items listed below will be incorporated into the 2005 workplan for APTA’s staff membership team. APTA will:
- Help chapters define the roles of volunteers and staff in membership development, including the membership chair, membership committee members, executive, Board of Directors members, and others. Provide sample job descriptions.
Develop feedback loops to help determine the effectiveness of communications based on response rates. APTA will provide components with a mechanism for tracking, evaluating, and reporting on recruitment/retention efforts.

Ensure that chapters are supplied the names of national meeting prospects no more than 30 days after the event concludes.

Provide membership development ad(s) to all components for use in their periodicals via www.apta.org.

Encourage chapters to follow up after APTA has done a mailing to prospects.

Resurvey components to update the master list of chapter benefits and services.

Encourage and provide instruction regarding chapter use of APTA’s categories in order to ease communication, streamline database maintenance, and enhance the ability to get the most out of the information available.

Share component membership profile sheets with appropriate Board liaisons so that they are in a better position to assist components with strategies for membership development.

Continue to reinforce the necessity of exceptional customer service among staff members.

Continue to conduct visits with components that need assistance with membership development and implement joint membership campaigns with interested components.

Conduct focus groups to determine the needs, attitudes, and perceptions of current and prospective members in the first 5 years of membership.

Launch a Young Professional Group that appeals to the needs of members in the first 5 years of their career.

**Action Items at the Component Level**

Although the following items are listed as “Priority 1,” “Priority 2,” and “Priority 3,” the Board of Directors strongly encourages the components to consider implementing as many of the following ideas as possible in the interest of enhancing membership development.

**Priority 1**

One critical aspect of ensuring integration of national and chapter membership is that chapters should be encouraged to offer core benefits packages that are of value in relation to the amount of dues charged and that are complementary to the core benefits offered by APTA.

The following components of a core benefits package should be made available by every **chapter**:

- A newsletter that is issued on at least a quarterly schedule to all chapter members.
- Advocacy at the state level (eg, regarding issues that affect the scope of practice in the state).
- State-specific reimbursement information (eg, Workers’ compensation).
- Member discounts for educational meetings.
- Public awareness efforts.
- A “welcome” packet.
- Availability and publication of one central telephone number and e-mail address for the chapter.

The following components of a core benefits package should be made available by every **section**:

- A newsletter or journal that is issued on at least a quarterly schedule to all section members.
- Advocacy (eg, regarding issues that affect the scope of practice that the section represents)
- Member discounts for educational meetings.
- Public awareness efforts.
- A “welcome” packet.
- Availability and publication of one central telephone number and e-mail address for the section.
Priority 2
Certain core standards are necessary to supplement the core benefits package, and the Board of Directors proposes that the following be implemented by all components:

- Appointment of a standing committee for membership development, designation of a membership chair who is accountable for chapter membership development efforts, and creation of district/regional chairs who are active in membership development efforts.
- Adoption of a set of guidelines for volunteers to encourage their participation in peer-to-peer contact and other recruitment and retention activities.
- Development, maintenance, and follow-up of membership prospect lists deriving from, for example, nonmember attendees at chapter meetings or nonmember purchasers of chapter products and/or services.
- Mentoring of new members (specifically, peer-to-peer contact).

Priority 3
The Board of Directors supports the following actions at the component level to help advance the Strategic Plan for Membership Development. Peer-to-peer contact has been shown repeatedly to have the greatest impact in membership development efforts. Whenever feasible, face-to-face or telephone contact by a physical therapist or physical therapist assistant is preferred. The following action items are incorporated into Tables 1 through 7, which summarize specific communications with member and nonmember groups (pages 23 through 29).

The Board of Directors encourages components to do the following:

- Communicate with all current members 60 days prior to expiration to reinforce the renewal message. [See Table 2.]
- Communicate with lapsed members 60 days after their renewal date to reinforce the renewal message. [See Table 3.]
- Send a post-renewal mailing to thank members for their renewal. [See Table 4.]
- Send a welcome packet within 30 days of receipt of “new member” and “transfer-in” lists from APTA. [See Table 5.]
- Send a “welcome back” packet or make a “welcome back” call within 30 days of receipt of the “reinstate” list from APTA. [See Table 6.]

In addition, the Board of Directors strongly encourages all components to implement the following actions at the earliest opportunity:

- Limit nonmember access to information via pricing policies, members-only Web site access, and other appropriate means.
- Implement innovative strategies for rebating or discounting meeting registrations and product/service purchases for those who join.
- Give public recognition to members by publishing the names of new members and “transfer-ins” in the component periodical.
- Maximize the success of peer-to-peer contact by encouraging active members to contact other physical therapists, and affiliate members to contact other physical therapist assistants to share their recruitment and retention messages.
- Involve sections in component membership efforts and partner with sections to promote the need to be part of one or more special-interest groups.

Key Membership Development Activities

Because time and resources may be limited, the Board of Directors identified a list of key tasks that can be implemented immediately by component leaders, volunteers, APTA Board of Directors, and
staff. As a result of these efforts, APTA and its components should begin to see an improvement in recruitment and retention rates.

**APTA Board of Directors**
- Communicate with component presidents on membership issues.
- Interact with members (especially newer practitioners) at APTA activities and be more visible to the general membership.

**National Office**
- Acknowledge new members immediately.
- Share membership statistics with chapters, sections, and appropriate Board liaison.
- Provide section information in renewal packets.
- Provide a thank-you gift to members.

**Membership Chairs**
- Acknowledge new members.
- Contact Career Starter Dues participants and those eligible for the program.
- Contact lapsed members and prospective members.
- Know key membership contacts in the national and component offices.
- Organize the flow of information to district/region leaders and grassroots members.
- Communicate with APTA about the needs and wishes of members.

**Chapter Presidents**
- Reach out to physical therapists, physical therapist assistants, and students by visiting schools and attending district meetings or local events.
- Maintain two-way communication by sharing information with committee chairs and board members.
- Assess the talents of your members and define roles of staff and volunteers.
- Interact with members (especially newer practitioners) at APTA activities and be more visible to the general membership.

**Chapter Executives**
- Acknowledge new members immediately.
- Keep membership chair informed about the membership development activities conducted by the executive office.
- Share membership information monthly with volunteers.
- Provide exceptional customer service.
- Contact Career Starter Dues participants who are transitioning to active or affiliate status and whose membership has lapsed.

**Section Presidents**
- Maintain two-way communication by sharing information with committee chairs and Board members.
- Assess the talents of your members and define roles of staff and volunteers.
- Retain APTA members by promoting the necessity to be a part of the specialty section.
- Interact with members (especially newer practitioners) at APTA activities and be more visible to the general membership.

**Section Executives**
• Acknowledge new members immediately.
• Keep membership chair informed about the membership development activities conducted by the executive office.
• Share membership information monthly with volunteers.
• Provide exceptional customer service.

Targeting the Message About APTA Membership

The Board of Directors also approved target groups, appropriate messages for each group, and the best means for getting this message across.

Top Groups to Target in Membership Development Efforts

1. Physical therapists
   • PT Fulls (physical therapists paying full dues)
   • Physical therapists in the first 5 years of membership
   • Acute care practitioners
   • Career Starter Dues participants
   • Clinical instructors
2. Physical therapist assistants
3. Students, program directors, and faculty
4. Former members (physical therapists and physical therapist assistants)
5. Employers of physical therapists and physical therapist assistants

Key Messages

Physical Therapists
• Advocacy: Membership creates a unified voice for the profession. The more members that APTA represents, the stronger our voice will be.
• Information: APTA members are more informed and have greater access to current information, which makes them better practitioners. Issues at the national level affect how you practice, regardless of your practice setting, specialty area, or years in practice.
• Professionalism: Know what it means to be a physical therapy professional.
• Vision 2020: Understand how the elements of APTA’s vision affect how you practice and why they are important for the profession.

Within the physical therapist population there exists a wide array of needs, interests, specialty areas, and career levels. For this reason, the messages directed at current and prospective members within these groups will be tailored based on specific demographics.

Physical Therapists in the First 5 Years of Their Career
• Advance Your Career: APTA gives you the resources to continue your learning, increase your knowledge, and advance your career. (Ex: APTA’s Advanced Clinical Practice Series, which offers intensive learning experiences consisting of lectures, case studies, and hands-on lab time.)

Career Starter Dues Participants
• APTA’s Investment in Your Future: Pay reduced membership rates and get all the benefits that full-paying members receive—APTA’s graduation gift to you.
• Start your career out right! APTA has the resources you need to find your first job, make professional contacts, and advance your career.

Acute Care Practitioners
• Serve your patients best as an APTA member. APTA is your reliable source for information, including staff experts who can answer your practice and research questions.
• In a dilemma about meeting productivity requirements while still providing appropriate care to your patients? Turn to APTA for assistance.
• Gain quick and free access to evidence-based practice through Hooked on Evidence, APTA’s online database.
• Professionalism: Know what it means to be a physical therapy professional.

Clinical Instructors
• APTA membership demonstrates your commitment and dedication to the physical therapy profession. What better way to show your students what it takes to be a professional than by being an APTA member?
• Serve as the best and most influential role model for the future of the profession by supporting and being involved in your professional association. Your actions speak volumes to your students.
• Information: Gain quick and free access to the information you need to provide the best possible learning experiences to your students.

Physical Therapist Assistants
• Advocacy: Membership creates a unified voice for the profession. Supervision on premise and under Medicare remain key issues.
• Team: Working together, physical therapist assistants and physical therapists form a valuable health care team.
• Information: APTA members are more informed and have greater access to current information.
• Achieve the recognition you deserve with APTA’s new Recognition of Advanced Proficiency for the Physical Therapist Assistant.

Program Directors and Faculty
• APTA membership demonstrates your commitment and dedication to the physical therapy profession. What better way to show your students what it takes to be a professional than by being an APTA member?
• Serve as the best and most influential role model for the future of the profession by supporting and being involved in your professional association. Your actions speak volumes to students in your program.
  • Information: Gain quick and free access to the information you need to provide the best possible learning experiences to your students.
Students

- Involvement: Get involved and stay involved. Learn how to network with the professionals and make contacts that may help you land your first job after graduation. Plus, you'll have the opportunity to influence the future of the profession.
- APTA’s Investment in Your Future. As a student member, you get all the benefits of belonging that physical therapists and physical therapist assistants received for just a fraction of the cost. Take advantage of this reduced dues rate—it’s APTA’s investment in your future.
- Professionalism: Get ready to be a professional. Take advantage of all the resources, information, and contacts available through APTA…and prepare yourself for the future.
- Bundle of goods: APTA has the tools and resources you’ll need during your physical therapy education. Get the Guide to Physical Therapist Practice, the FirstHand Kit, Writing Case Reports, National Student Conclave registration, and more all at discounted rates for members only. APTA’s members-only prices on publications are cheaper than you can find in your university bookstore. It pays to be a member!
- Hooked on Evidence: Quick and easy access to information regarding evidence-based practice.

Former Members

- Advocacy: Membership creates a unified voice for the profession. The more members that APTA represents, the stronger our voice will be. Issues at the national level affect how you practice, regardless of your practice setting, specialty area, or years in practice.
- Information: APTA members are more informed and have greater access to current information, which makes them better practitioners.
- Professionalism: Know what it means to be a physical therapy professional.
- Vision 2020: Understand how the elements of APTA’s vision for the future affect how you practice, and why they are important for the profession.

Employers of Physical Therapists and Physical Therapist Assistants

- Employee enrichment: Enhance facility reputation and bottom line by employing physical therapists and physical therapist assistants on the cutting edge of the profession.
- Practice solutions: Watch your business thrive by giving employees the tools they need to practice more effectively.
- Advocacy: APTA efforts affect your bottom line and ensure your employees can provide the best possible health care.

Mediums for Communicating with Target Groups

Following are the preferred mediums for communicating the appropriate messages with the various target groups of membership. Whenever possible, peer-to-peer contact by telephone or in person serves as the most effective means of communication. However recognizing that time does not always allow for personal contact, the following means of communication are acceptable and appropriate.

Physical Therapists

- Peer-to-peer contact—one physical therapist to another
- E-mail, component Web site, and APTA Web site
- Membership ads in APTA or component publications
- Direct mail to employers, PT managers, and schools

Physical Therapist Assistants
• Peer-to-peer contact—one physical therapist assistant to another
• E-mail, component Web site, and APTA Web site
• Direct mail to employers, PT managers, and schools

**Graduating Students**
• Program directors

**Students**
• E-mail, component Web site, and APTA Web site
• Program directors
• Former students
• Student and faculty liaisons
• Student special-interest groups
• Career counseling

**Former Members**
• Peer-to-peer contact
• Direct mail

**Glossary of Terms Used in Tables 1-7**

**Current Member:** A current member is an individual whose “paid through” date has not yet expired. The “paid through” date is the last day of the month of an individual’s term of membership. This date is always the last day of the month (e.g., 8/31/05, 12/31/05). This date is also referred to as the “renewal date” or the “expiration date.”

**Lapsed (Former) Member:** A lapsed member is any member who has not paid her/his membership dues by the end of the 30-day grace period following that person’s “paid through” date. Lapsed members do not retain the status of “continuous” membership when they pay again.

**Reinstate/Rejoin:** A reinstatement occurs when a lapsed member reactivates his/her membership after dropping that membership for more than 30 days after his/her “paid through” date. The reinstated member is given a new 12-month term of membership.

**Renewal:** A renewing member is one who pays her/his membership dues within the time frame to receive continuous membership.

**New Member:** A new member is an individual who is brand new to APTA. This individual has completed a membership application, remitted the appropriate dues payment, and been entered into the membership database for the first time.

**Nonmember:** A nonmember is an individual who has never submitted a membership application to APTA.

**Prospect:** A prospect is an individual who is not currently a member, but is eligible to join. This group may include former members as well as persons who have never been members.

**Welcome Packet:** Information sent to new, reinstated, or members transferring into the component to acknowledge their membership. A welcome packet might include a letter from the component president sharing the name and phone number of the district/regional chair, the phone number of
the component office, and a list of Board members with contact information; the most recent edition of the component newsletter; and information about volunteer opportunities.

**Table 1. Component Communication With Current and Prospective Members**
The following table outlines component (chapters and sections) communications with current and prospective members as recommended within the *Strategic Plan*.

<table>
<thead>
<tr>
<th>Who?</th>
<th>What?</th>
<th>When?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current Members:</strong> Physical Therapists, Physical Therapist Assistants, Active-Students, and Students (PT and PTA)</td>
<td>• Renewal Contact (via fax, mail, e-mail, or phone)</td>
<td>• 60 days prior to expiration</td>
</tr>
<tr>
<td><strong>Former Members:</strong> Newly Lapsed</td>
<td>• Renewal Reminder Contact: (via phone, mail, or e-mail)</td>
<td>• 60 days after expiration</td>
</tr>
<tr>
<td><strong>Renewing Members:</strong> Physical Therapists and Physical Therapist Assistants</td>
<td>• Post-Renewal Thank You (Letter, Gift, &quot;Pass Along&quot; Application)</td>
<td>• 90 days after renewal</td>
</tr>
<tr>
<td><strong>Reinstating/Rejoining Members:</strong> Physical Therapists and Physical Therapist Assistants</td>
<td>• Chapter/Section &quot;Welcome Back&quot; Packet</td>
<td>• 2-4 weeks after component receives information from national office</td>
</tr>
<tr>
<td><strong>Prospects:</strong> Meeting Attendance at Component Level</td>
<td>• Letter and Membership Application</td>
<td>• Within 2 weeks of meeting date</td>
</tr>
</tbody>
</table>

*All component communications also are listed in Tables 2-8 to show how these efforts complement those being conducted at the national level.

**Table 2. Communications With Current Members**
The following table outlines national and component communications with current members. Unless specifically noted as a "chapter/section" communication, each contact is made by the national office.

<table>
<thead>
<tr>
<th>Who?</th>
<th>What?</th>
<th>When?</th>
</tr>
</thead>
</table>
| Physical Therapists | • Renewal Letter 1  
  • **Chapter/Section:** Contact (via fax, mail, e-mail, or phone)  
  • Renewal Letter 2 | • 90 days prior to expiration  
  • 60 days prior to expiration  
  • 30 days prior to expiration |
| Physical Therapist Assistants | • Renewal Letter 1  
  • **Chapter/Section:** Contact (via fax, mail, e-mail, or phone)  
  • Renewal Letter 2 | • 90 days prior to expiration  
  • 60 days prior to expiration  
  • 30 days prior to expiration |
| Active-Student | • Renewal Letter 1  
  • **Chapter/Section:** Contact (via fax, mail, e-mail, or phone) | • 90 days prior to expiration  
  • 60 days prior to expiration |
Table 3. Communications With Former Members

The following table outlines national and component communications with former members. Unless specifically noted as a “chapter/section” communication, each contact is made by the national office.

<table>
<thead>
<tr>
<th>Who?</th>
<th>What?</th>
<th>When?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Physical Therapists and Physical Therapist Assistants Who Are Newly Lapsed</strong></td>
<td>• Renewal 3 (Postcard)</td>
<td>• 30 days after expiration</td>
</tr>
<tr>
<td></td>
<td>• <strong>Chapter/Section</strong>: Contact (via phone, mail, or e-mail)</td>
<td>• 60 days after expiration</td>
</tr>
<tr>
<td></td>
<td>• Renewal Letter 4</td>
<td>• 90 days after expiration</td>
</tr>
<tr>
<td><strong>Physical Therapists Who Are Lapsed &gt; 90 Days</strong></td>
<td>• Lapsed Member Letter</td>
<td>• 4-16 months after expiration</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Periodic (2-3 times/year)</td>
</tr>
<tr>
<td><strong>Physical Therapists Assistants Who Are Lapsed &gt; 90 Days</strong></td>
<td>• Lapsed Member Letter</td>
<td>• 4-16 months after expiration</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Periodic (2-3 times/year)</td>
</tr>
</tbody>
</table>
Table 4. Communications With New Members
The following table outlines national and component communications with new members. Unless specifically noted as a “chapter/section” communication, each contact is made by the national office.

<table>
<thead>
<tr>
<th>Who?</th>
<th>What?</th>
<th>When?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical Therapists and Active-</td>
<td>• Welcome e-mail</td>
<td>• 1 week after joining</td>
</tr>
<tr>
<td>Students</td>
<td>• New Member Welcome Packet</td>
<td>• 3-4 weeks after joining</td>
</tr>
<tr>
<td></td>
<td>• Membership Card</td>
<td>• 1-2 weeks after joining</td>
</tr>
<tr>
<td></td>
<td>• Membership Certificate (upon request)</td>
<td>• 2-4 weeks after joining</td>
</tr>
<tr>
<td></td>
<td>• Membership Decal</td>
<td>• 1-2 weeks after joining</td>
</tr>
<tr>
<td></td>
<td><strong>Chapter/Section:</strong> New Member Welcome Packet</td>
<td>• 2-4 weeks after component receives information from national office</td>
</tr>
<tr>
<td></td>
<td>• Advantage Newsletter and <em>e-Advantage</em></td>
<td>• 6 times/year</td>
</tr>
<tr>
<td></td>
<td>• New Member Listing in PT Magazine</td>
<td>• Monthly</td>
</tr>
<tr>
<td></td>
<td><strong>Chapter/Section:</strong> New Member Listing in Periodical</td>
<td>Updated every issue</td>
</tr>
<tr>
<td>Physical Therapist Assistants</td>
<td>• Welcome e-mail</td>
<td>• 1 week after joining</td>
</tr>
<tr>
<td></td>
<td>• New Member Welcome Packet</td>
<td>• 3-4 weeks after joining</td>
</tr>
<tr>
<td></td>
<td>• Membership Card</td>
<td>• 1-2 weeks after joining</td>
</tr>
<tr>
<td></td>
<td>• Member Decal</td>
<td>• 1-2 weeks after joining</td>
</tr>
<tr>
<td></td>
<td>• Membership Certificate (upon request)</td>
<td>• 2-4 weeks after joining</td>
</tr>
<tr>
<td></td>
<td><strong>Chapter/Section:</strong> Welcome Packet</td>
<td>• 2-4 weeks after component receives new member data from the national office</td>
</tr>
<tr>
<td></td>
<td>• Advantage Newsletter and <em>e-Advantage</em></td>
<td>• 6 times/year</td>
</tr>
<tr>
<td></td>
<td>• New Member Listing in PT Magazine</td>
<td>• Monthly</td>
</tr>
<tr>
<td></td>
<td><strong>Chapter/Section:</strong> New Member Listing in Periodical</td>
<td>Updated every issue</td>
</tr>
<tr>
<td>Students (PT and PTA)</td>
<td>• Welcome e-mail</td>
<td>• 1 week after joining</td>
</tr>
<tr>
<td></td>
<td>• Student New Member Packet</td>
<td>• 3-4 weeks after joining</td>
</tr>
<tr>
<td></td>
<td>• Membership Card</td>
<td>• 1-2 weeks after joining</td>
</tr>
<tr>
<td></td>
<td>• Member Decal</td>
<td>• 1-2 weeks after joining</td>
</tr>
<tr>
<td></td>
<td><strong>Chapter/Section:</strong> Welcome Packet</td>
<td>• 2-4 weeks after joining</td>
</tr>
<tr>
<td></td>
<td>• New Member Listing on <a href="http://www.aptastudent.org">www.aptastudent.org</a></td>
<td>• 2-4 weeks after component receives date from the national office</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Ongoing</td>
</tr>
</tbody>
</table>
Table 5. Communications With Reinstating/Rejoining Members*
The following table outlines national and component communications with reinstating/rejoining members. Unless specifically noted as a “chapter/section” communication, each contact is made by the national office.

<table>
<thead>
<tr>
<th>Who?</th>
<th>What?</th>
<th>When?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical Therapists</td>
<td>• Membership Card</td>
<td>• 1-2 weeks after rejoining</td>
</tr>
<tr>
<td></td>
<td>• Membership Certificate (upon request)</td>
<td>• 2-4 weeks after rejoining</td>
</tr>
<tr>
<td></td>
<td>• Membership Decal</td>
<td>• 1-2 weeks after rejoining</td>
</tr>
<tr>
<td></td>
<td>• “Welcome Back” Packet</td>
<td>• 1-2 weeks after rejoining</td>
</tr>
<tr>
<td></td>
<td>• Chapter/Section: “Welcome Back” Contact (via phone, mail, or e-mail)</td>
<td>• 2-4 weeks after chapter receives information from national office</td>
</tr>
<tr>
<td>Physical Therapist Assistants</td>
<td>• Membership Card</td>
<td>• 1-2 weeks after rejoining</td>
</tr>
<tr>
<td></td>
<td>• Membership Certificate (upon request)</td>
<td>• 2-4 weeks after rejoining</td>
</tr>
<tr>
<td></td>
<td>• Membership Decal</td>
<td>• 1-2 weeks after rejoining</td>
</tr>
<tr>
<td></td>
<td>• “Welcome Back” Packet</td>
<td>• 1-2 weeks after rejoining</td>
</tr>
<tr>
<td></td>
<td>• Chapter/Section: “Welcome Back” Contact (via phone, mail, or e-mail)</td>
<td>• 2-4 weeks after chapter receives information from national office</td>
</tr>
</tbody>
</table>

Table 6. Communications With Nonmembers
The following table outlines national communications with nonmembers.

<table>
<thead>
<tr>
<th>Who?</th>
<th>What?</th>
<th>When?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical Therapists and Physical Therapist Assistants</td>
<td>• Double Postcard: Update Address, Check Off for More Information (gift on return of information) [Incremental test, 5-10 states per year, using licensure lists]</td>
<td>• 1 time/year</td>
</tr>
<tr>
<td></td>
<td>• Double Postcard Respondents: Join Letter &amp; Application</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>2-4 weeks after postcard returned to APTA</td>
</tr>
<tr>
<td>Students (PT and PTA)</td>
<td>• Program Directors Mailing: applications and recruitment brochures</td>
<td>• 1 time/year (January)</td>
</tr>
<tr>
<td></td>
<td>• Membership Campaign</td>
<td>• Fall</td>
</tr>
</tbody>
</table>
Table 7. Communications With Prospects

The following table outlines national and component communications with prospective members. Unless specifically noted as a “chapter/section” communication, each contact is made by the national office.

<table>
<thead>
<tr>
<th>Who?</th>
<th>What?</th>
<th>When?</th>
</tr>
</thead>
</table>
| Prospects via Cold Call to National Office | • If in Database: Letter + Invoice if Lapsed > 12 months  
• If Not in Database: Letter + Application + Section Brochure  
• If Don't Respond: Updated Letter + Membership Materials | • 1-5 business days after call, sent by Membership Dept  
• 1-5 business days after call, sent by Membership Dept  
• 60 days after call, sent by Marketing Dept |
| Prospects via Meeting Attendance at National Level | • Letter + Application | • Within 4 weeks of meeting date |
| Prospects via Meeting Attendance at Component Level | • Chapter/Section: Letter + Application | • Within 4 weeks of meeting date |

(Membership Development Department, ext 3110)

[Document updated: 12/14/2009]

Explanation of Reference Numbers:
BOD_P00-00-00-00 stands for Board of Directors/month/year/page/vote in the Board of Directors Minutes; the "P" indicates that it is a position (see below). For example, BOD P11-97-06-18 means that this position can be found in the November 1997 Board of Directors minutes on Page 6 and that it was Vote 18.