



# Increasing Member Engagement for AGMs



# Enhancing Member Engagement at AGMs

Many organisations undertaking their regulatory AGM process use the meeting opportunity to engage with their membership. In many cases the AGM is the only formal meeting during the year where members group together and are given the chance to ask questions and understand more about what the organisation has achieved and what they are looking to achieve moving forward.

## Maximising AGM Impact and Member Participation

Organisations must meet their governance objectives in undertaking their AGM process and there is an associated cost to running them. The number of members involved and who engage in the AGM process can be used as an indicator of how well the organisation is performing. Especially useful is the feedback received from members which can prove very valuable indeed in shaping the future development and structure for all concerned. Therefore, as the AGM must be undertaken many organisations are looking for the highest level of engagement with their members to not only capture valuable feedback but also to show case their activities and plans.



In this document, we look at ways of increasing engagement with members for the AGM process.



# Organisation articles

The articles, along with any by-laws, will describe the process, notices, dates, and other aspects of the AGM meeting process. Organisations must ensure that any activity detailed in these governance documents relating to the AGM meeting is undertaken as described, as any deviation may be challenged by members.



In most cases the document will describe the functions of the AGM meeting process, but for engagement this is most likely limited to ensuring all members receive notification of the meeting location, date, time, and order of business. Generally leaving it with the member to decide if they get involved or not.

## Pre-notice period

The period in the lead up to issuing the formal AGM notice to members allows the greatest time to plan, communicate, advertise, and prepare members for the forthcoming event. Ideally you should be thinking about your members when planning your AGM, try to envisage their experience and perception of the organisation and the AGM process.



### Here are some aspects to consider:

- Think about the timing and location of the AGM. How would your members react to an AGM on a normal working day during work time, or what about at the weekend. Do you have any demographic information in the organisation regarding members that can help you determine the best time to hold the meeting. For the location, consider where many of your members reside and how easy it would be for them to travel. Consider offering remote access (articles permitting) to increase attendance.
- The meeting agenda may also influence whether members engage. For example, do you think it would be attractive to members if the meeting is short and only covers the main typical 3 resolutions, and a presentation on the financial statements. Think about what they would like to hear about, any key topics of interest or noteworthy aspect of your organisation that they would feel passionate about.
- You may already hold information about when you typically get the highest level of interest and engagement from your members through previous meetings or other events. Use this information to help you plan your process.
- Consider minority groups and ensure accessibility for all members, look to encourage all members to participate, remove any perceived barriers and promote their participation.
- Ask your members “What incentivises them to get involved in the AGM process?” the answer you receive may give you a better understanding of changes and improvements you can make to your process. Where possible it is recommended that you should gather this feedback just after the AGM process whilst it is fresh in the members memory before the next AGM process.

**It is worthwhile speaking with your marketing team, they may have insights on your members that you can use in your planning process.**

## Use the pre-notice period to promote the AGM process, here are some suggestions:

- Create and add a banner to all staff email signatures signposting the process and why it is important for members to get involved. Consider creating a logo/graphic/strapline for the process.
- If you have high footfall locations where members pass, think about placing pull up banners or posters/notices in those locations to promote the process.
- Mention the AGM at all other types of events, such as training or other events where members might be in attendance. It doesn't take much for the AGM to be mentioned by a speaker at the start of that event to promote it as a key event they shouldn't miss.
- Add News items to your website and social media posts, and ensure your posts are shared by all relevant parties.
- Send warm up emails to members, tell them that there is an important process coming and why they should get involved. 'Look out' for further exciting news!

**Remember to focus on what's important to members and why it would benefit them to get involved.**

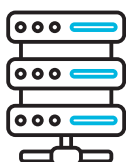
## You may wish to highlight some incentives to members to try and attract their attention and get them involved, some examples may include:

- The organisation will give a donation to charity for every member that votes.
- Run your AGM meeting alongside another event (conference/open day) that would make it more attractive for members to attend.
- Consider a high-profile keynote speaker or guest to discuss an important member topic.
- Add members that engage/vote/participate into a prize draw.
- Hold your AGM at a venue that people would like to go to, for example a sports ground or historical building, maybe offer a free tour after the AGM.



# Notice and proxy voting period

Defined by your articles and by-laws, this period is likely much shorter and may limit your ability to undertake engagement processes with your members, as it is likely your Proxy voting process will already be underway. This means that any promotion or communication that isn't proxy voting related will send mixed messages to your members.



If you are sending AGM notices via email then try not to add too many different messages into its content, ideally this should be a call to action with reference to 1 or 2 key points. If the main aspect is to try and point members to the Proxy voting process, then look to make this a 1 click process. Also try to use an email delivery system that tracks opens, click throughs and other metrics to measure the engagement rates, this will be valuable information for next time, or any reminder processes planned. For those emails that 'bounced', consider sending those members a simple letter containing the same information as the email. If you do not follow up with such a letter, then you have already lost those numbers of members from ever engaging in your process.

**If you are sending out postal proxy packs, then you may improve engagement by implementing some of the following:**

- Add your organisation's logo to the outer envelope so members don't think it is junk mail, and signpost what's inside.
- Use colour, graphics, highlighted sections where possible to encourage members to read the content.
- Use plain English so members understand the messaging and what you would like them to do.
- Add a pre-paid and pre-addressed return envelope so it is easy for them to return their proxy instructions.
- Make use of 'Quick vote' options where members can use one mark to instruct the Chair and allow them to vote as the board recommends.
- Offer multiple channels of submitting their Proxy vote or getting involved, i.e. how to ask a question, or where best to park if they are coming along to the meeting in person.
- If asking members to pre-register for the in-person attendance, offer them an incentive of a cup of tea and a pastry on arrival.

**For online proxy voting processes**, try to keep the site simple and intuitive. Try to use voting metrics to determine reminder activities. Use it as a final opportunity to ask if they would like to attend the meeting (either in-person or virtually) instead of submitting a proxy vote.



# AGM Meeting

By the time the meeting occurs the time has passed to promote it, therefore members would have engaged ahead of the meeting via the proxy voting process and/or sending in questions (if allowed), or they will be in attendance (in-person or virtually) at your meeting. Planning to ensure everyone's voice is heard at the meeting will be key to increasing engagement.



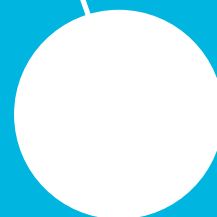
**If you are looking to run a Hybrid AGM, make sure that everyone attending remotely has the same functions to be seen and heard along with secure voting options, as those attending in person. This will mean planning, Audio and Visual equipment, internet connection speeds and rehearsals for the Chair and Panel members.**

You will need to consider the budget you have for the event and get organisation buy-in to the process; if you do increase members engaging with the process, you will want them to have a great experience at the meeting.

After the AGM, it is a good idea to undertake a lesson-learnt process with all stakeholders to determine what worked well and what didn't, this will help planning for the next event. Also, if you recorded the event, put a copy of it on your company site as not everyone will be able to make the meeting, but may well be interested to learn what happened.

### SUMMARY

# Effective Member Engagement



**There is no ‘one size fits all’ approach to ensure increased member engagement at your AGM. Increased engagement will come from understanding your members and their needs, however you are best placed to do that as no-one knows your members better than you. Remember to consider all aspects of the process from their perspective, in terms of touch points, communications, messaging, their key drivers, etc.**

You should provide members with as many possible ways to interact/engage as possible, consider a multi-channel approach for this to be effective. Build on things that have worked previously for the organisation, there is no point re-inventing the wheel, if something worked well before, try it again. If you have a network of colleagues in your industry you are linked with, for

example an Association or Institute, try speaking with peers about what worked or didn't work for them.

Finally, don't wait until your notice goes out to then start trying to increase engagement, as you will have lost key time and opportunities and will have a limited impact on engagement.



### Security guaranteed

With encryption protection, multi-factor authentication, data security and secure servers, you're in safe hands.



### User friendly

You'll find UKEmeet mobile-friendly and easy to use even for those who aren't tech-savvy, making voting an enjoyable experience for all.



### Proxy voting

Allows proxy votes to be cast for members not in attendance up to 48 hours before a meeting, articles permitting.



### Unrivalled customer service

We hold the Customer Service Excellence Standard (CSE) and have a 100% customer satisfaction score.\*



### Bespoke to your brand

The platform can be customised for your brand or group identity complete with image and logo, helping to further inspire confidence.



### Unique features built in

Scalable so you can also make use of extra features such as downloadable documents, submit a question, proxy countdown timer and the usual functions of your chosen interactive meeting or broadcast solution.



\*Source: UK Engage Customer Satisfaction Survey 2022. Assessed and accredited by Customer Service Excellence.