

## **Engaging Members in an Era of Profound Change. A Look at Some Best Practices**

By Audrey Price, CAE

Not-for-profit organizations have experienced and continue to operate in an era of profound change that began several years ago. Technology, once the blessing that enabled us to do more with less, has also become a curse.

Members once viewed associations as the go-to point for information and current practices – today we compete with pages and pages of information available via the internet. Members once flocked to annual meetings and conferences to network and participate in education workshops that are now delivered in chat rooms, blogs and via webinars.

How do we attract and retain members when generational change, in both those aging and those under thirty, has resulted in new demands and the interests and expectations of each are so very different? Where once a single renewal notice and membership card were sufficient to satisfy members, they now look for ROI on their membership investment.

Associations struggle with how they are perceived, how they provide value and how to ensure members continue to support them. Sometimes significant change appears disguised first as a significant challenge. It is with the above thoughts in mind that I undertook a benchmarking exercise in an effort to identify some best practices in high performing associations in Canada relative to member engagement.

### **Social changes impacting associations**

The public's interest in joining associations has continued to wane over the past years for various reasons. The Canadian Society of Association Executives, in their CAE® Program, cites a number of social changes impacting associations including the following:

- the decline of the competence of traditional institutional authorities;
- members scrutinizing and evaluating every expenditure (value-consciousness);
- new social issues;
- rapid growth in technology, in particular, social media;
- time-poverty on the part of volunteers;
- the demand for instant service delivered at the members' convenience, not the association's;
- the demand for more choice in services and how they are delivered;

- expectations for higher levels of quality; and
- an aging population.

In his book, “*Associations in Canada: Future Impact and Influence*”, Donald Belfall also cites a number of issues affecting associations and membership, including the following:

- a lack of attention to members’ value perceptions of programs and services;
- the increasing tendency for mandatory and quasi-voluntary membership associations to take their members for granted;
- concerns regarding the effectiveness of the association’s Board of Directors and the usefulness of new models of governance;
- the increasing need for greater involvement by the grassroots membership and for greater member input on an ongoing basis; and,
- The need to recognize members’ changing attitudes and the effects of demographics on services and programs.

### **Research results**

I invited twenty-three associations to contribute to my benchmarking study – eight ultimately agreed to participate. My research revealed:

- More than three quarters of the associations surveyed receive over half of their annual revenue from membership dues;
- Increased membership and improved retention, increased member engagement, and increased revenue were the top three membership recruitment and retention strategies;
- More than three quarters of respondents identified volunteer and Board member recruitment as a significant challenge for associations in the next five years;
- The most effective fundraising tools were identified as education events, workshops and certification programs followed by annual conference registration;

- Over half the respondents indicated that engaging a younger generation of members is very important to their ongoing success however none had a strategy in place. Three quarters indicated they were working on one or planned to create one;

- One third of the respondents indicated a 20% increase in membership within the last five years and over half have membership recruitment and retention strategies in place; and,

- 100% of respondents identified Facebook, Twitter and other social media as the frequently used social media tools.

A more detailed analysis of the benchmarking results reveals a number of best practices in each of the survey areas. Below is a checklist of those practices employed by the majority of the respondents.

### ***1. Membership Recruitment and Retention***

- Allocate 5 to 10 % of the annual budget for recruitment and retention strategies
- Develop specific strategies to address membership marketing
- Develop strategies to create touch points throughout the year that address:
  - o Advocacy activity
  - o Education, workshops
  - o Publications and newsletters
  - o Affinity programs and discounts based on member input
  - o Conference and tradeshow
- Develop a social media plan with specific objectives to increase online presence and create public awareness
- Ask for member input
- Ensure website information is current, regularly updated and membership application is convenient
- Increase member communication to a minimum of 4 to 6 times per year, in addition to the renewal notice

- Send 1 to 3 renewal notices
- Invite members to attend a committee meeting first to determine if they are interested in the topic and in participating as a member
- Invite members to become involved in specific projects with a clear end date (i.e. a task force), to accommodate those interested in participating but with limited available time
- Ensure members are aware credit card payments are accepted for applications and renewals

## 2. *Challenges anticipated by associations within the next five years*

- To address concerns for volunteer and Board participation, personally invite members to volunteer and use that as a development plan to secure them as future Board members
- Development of a solid membership engagement plan can mitigate member indifference
- Survey members for needs and interests and then develop strategies to deliver
- Continue to conduct environmental scans to determine new challenges facing associations

## 3. *Recruiting younger members*

- Become familiar with the generational characteristics that define both the aging population and generations X & Y
- Develop events of interest to younger generations
- Boost social media presence through Facebook, Twitter or LinkedIn
- Form a committee to develop a value proposition for younger generations
- Invite younger members to join committees or the Board
- Introduce mobile apps and online products – go where young people gather their information

## 4. *New Member Welcome*

- Ensure new members feel welcomed
- Develop a new member package that is distributed within 1 to 3 weeks after membership approval
- Ensure welcome package contains:
  - o Welcome Letter from the Board President
  - o A list of the Board Directors, Committee Chairs and Committee members
  - o Membership card or membership login information
  - o Membership benefits list,
  - o Copy of recent newsletters
- Consider developing an onboarding webinar to present new member orientation
- Develop an event specifically for new members to network
- Send a welcome email
- Call and invite a new member to an event or to become involved on a committee

## **5. *Member Engagement and ROI***

- Conduct member surveys to determine interests and concerns
- Introduce email communication as a quick way to distribute information and stay connected to member issues and thoughts
- Personally invite members to volunteer
- Ensure renewal letters and notices are not the only communication a member receives
  - Invite members to submit articles for magazines/newsletters

## **Conclusion**

Member engagement is not always easy to understand. David Gammel, CAE, defines it on his blog, *Definition of Member Engagement for Associations*, as:

“Member engagement is the result of a member investing time and/or money with the association in exchange for value. The more of these precious resources they invest, the more engaged they are.”

There is no right or wrong way for an organization to encourage engagement - what may work for some may not work for others. Giving significant consideration to best practices employed by successful organizations, however, just makes good sense.