



Focus on Future Membership & Volunteer Growth

**South Carolina Society of
Association Executives
Annual Conference**

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Overview

Optimal Use of Core Functions

1. Retention/Renewal
2. Relationship Management
3. Volunteer Engagement
4. Segmentation/Market Management
5. Acquisition/Outreach
6. Accountability/Financial Management
7. Program Development
8. Research/Data Collection
9. Database Management
10. Image Management
11. Change Agent

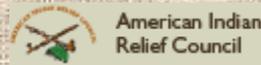
Principles & Best Practices

Core Premise: Focus is on Future Growth

- Many resources developed over time (ASAE)
 - *Membership Essentials* handbook
 - Older: *Retaining Members, Millennium Membership*
 - *Decision to Join & Decision to Volunteer*
 - *7 Measures of Success*
- Goal today
 - Present view of what you need to achieve/maintain growth
 - Some best practices
- What we'll cover
 - Lessons/observations from 100+ associations
 - In-depth things learned from association positions
 - Conferences: ASAE, DMA Nonprofit, state societies
 - Focus: always on strategy PLUS execution



Nonprofit Federation



1. Retention/Renewal

- #1 campaign or function: if calendar or anniversary
- How are these managed? In program reviews ...
 - We find that personalization may be lacking or done awkwardly
 - Batch lots without personalization instead of variable copy
 - Loaded up with add-ons: PAC, foundation contributions, demographic updates
 - Eliminating/deferring these steps tends to improve performance
- Basic goal: cut through the clutter and generate the sale
 - Best packages are often a cover letter and 'invoice'
 - Treated as mix of reminder and accounting process
 - Often use multi-media: phone up-front and telephone late in process: amore timely online renewals and better recapture
 - Generally a 90/60/30/0/-30 day, 5-contact sequence helps

Best practices: renewal/reinstatement

- As with most marketing, other vehicles carry weight of reminding of benefits:
 - Emails, publications that are cultivational in nature
 - Peer to peer and/or staff phone calls
 - This takes pressure off the renewal to do more than it needs to
- Data management helps
 - Postal hygiene on a regular basis (NCOA & Address Service requests)
 - Leading with email allows bouncebacks to be flagged
- "Closed loop" to measure exposure, impact, outcomes

"The battle is won or lost before you take the field"

- Sun Tzu

2. Relationship Management

- If members are new, what impressions are they forming?
- Everything is new, so all introductory messages are collectively transmitted but may be a confused mass:
 - When events are held
 - How to register for meetings
 - How to participate in benefits
- How is contact managed?
 - How often would a confused member get a chance to speak with a live person to explain things?
 - If they do, how much overhead are you burning?
 - Do they turn to each other for (possibly right) answers?
- Best practices in CRM
 - Consist of repeated 'touches' from early in their tenure
 - Start with the acknowledgement: donor research demonstrates second gift declines sharply if *> 72 hours*
 - Timely response to calls & messages matter, for the issue at hand and symbolically

Best practices: Relationship management

- Web: studies document low frequency of visits, value
- Even today, many sites hinder speed, flexibility of updating through old content management models
 - Design—Many suffer from excess “creativity” (flash animation) or too little (minimalist or crowded navigation)
 - Analytics—Very little analytics to measure member visits, frequency
 - User Experience—Many remain “brochureware”/no engagement
- Missing focus on search engine optimization
 - Need metatags, frequent updating, reciprocal links, content aggregators
- Track volume of member web visits and their tracking
 - Web traffic tracking: from hits to unique user sessions, harder to tell how many members visit
 - Measure real frequency of use, sections visited, surveys to validate
 - Segment/detail logs to measure progression/landing page visits

3. Volunteer Engagement

- **Role**: Builds community, access to SMEs/expertise, ensures we have right tone, provides voice to members, creates leadership “farm team,” avoids potential governance disasters.
- **Concerns**: Representation, how to allocate resources absent ROI, balancing quantity vs. quality, a system and group always exists absent strong active catalyst role.
- **Metrics**: # who participate, degree of desired turnover, degree of retired retention of volunteers in positions, impact on retention.

Best practices: Volunteer engagement

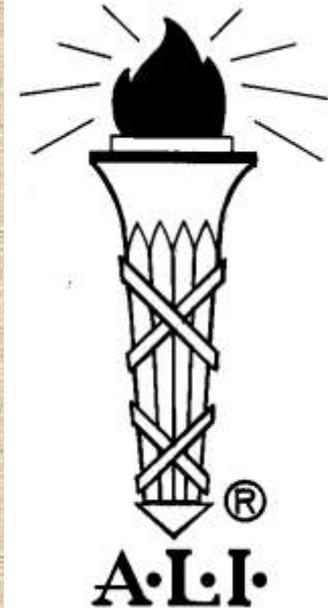
- Decision to volunteer presents reasons for engagement
 - Echoes 'give to get' mentality in *Decision to Join*
 - Emphasizes importance of effective recognition
 - Desire for effectiveness

Observation:

- Key issue comes in member recognition
- Often rank and file members draw the wrong inferences
- Narrow range of members who are quoted, mentioned by way of indirect recognition ...
 - Too narrow conveys impression of a 'club.'
 - "Same people are always mentioned"

4. Segmentation/Market Management

- Major principle: reflects need to be inclusionary
 - ASAE: 4 major strategic initiatives includes diversity
 - Not political: driven by demographics
 - Our population is growing far more diverse: U.S. Caucasian minority by 2045
 - Globalization for national organizations
- Segmentation: diversity-based business model
 - Generational marketing, gender, level/breadth of functional areas: focus on service and engagement
 - To attract members, new members need to see people like them
 - American Law Institute example: “youth movement” from an average age of 65 (typical also of donor orgs.)



Best practices: Generational marketing

- Same as with all individuals: to attract & keep, often two different methods
 - Underlying response dynamics haven't changed
 - Young respond to offers, word of mouth from others ... peers AND supervisors
 - Often barrier is trying something new, out of pocket
 - Offer satisfaction guarantees, trials offers, risk-reducers
- Coping strategies in nonprofit marketing
 - Huge wasted effort trying to convert young donors
 - Now, conscious attempts to skew younger in right ranges
 - Adapt programs to meet their psychic needs
 - Asking for time and in-kind support for advocacy, not money they don't have
 - Feeds desire to have an effect, address underlying issues

5. Acquisition/Outreach

- Need to bring more people into the fold
 - Demonstrate a willingness to accept new members
 - Awareness is raised through word of mouth
 - Direct marketing only "closes the sale"



PICPA
Pennsylvania Institute of Certified Public Accountants

MEMBERSHIP APPLICATION

Application subject to review and approval

650 Locust Street, 15th Floor, Philadelphia, PA 19106
 Telephone: (215) 566-2000
 Fax: (215) 566-2001
 E-mail: membership@picpa.org

Personal Information

First Name: _____ Last Name: _____
 Middle Initial: _____
 Date of Birth: _____
 Social Security Number: _____
 Home Address: _____
 Home Phone: _____
 Home E-mail: _____
 Please check if you are a Student/Post-Grad:

Business Information

Name of Firm or Organization: _____
 Business Address: _____
 Business Phone: _____
 Business E-mail: _____
 Major Business Product or Service: _____
 Does your business address in any of the following? Yes No
 Regulatory Agency: Public Accounting/Firm Insurance Government Non-Profit
 Type of Employer: Partner/Full Time Part Time Temporary/Seasonal Consultant
 Are you a member of any other professional organizations? Yes No
 Name of Other Organization: _____
 How long have you been a member of that organization? _____
 How long have you been a member of PICPA? New Renewal Reciprocity

Professional Information

Professional License Number: _____
 License State: _____
 License Expiration Date: _____
 License Status: Active Inactive Suspended Expired

Education Information

How many years of education beyond high school? _____
 How many years of education beyond college? _____
 How many years of education beyond a master's degree? _____
 How many years of education beyond a Ph.D.? _____

Professional Information

Applicant's Signature: I am applying for membership in PICPA and I understand the responsibilities of a member. I agree to abide by the rules and regulations of PICPA and to pay the dues and fees as required. I agree to be bound by the decisions of the governing body of PICPA. I agree to be bound by the decisions of the governing body of PICPA. I agree to be bound by the decisions of the governing body of PICPA.

Signature: _____
 Date: _____

Approved & Submitted by: _____
 Title: _____
 Date: _____

MEMBERSHIP APPLICATION

Membership Types and Dues Rates*

MEMBERSHIP TYPE	REG. DUES	RENEWAL DUES
Life Membership The Life Membership is a one-time payment of \$10,000. It entitles the member to all the benefits of membership for the remainder of their life.	\$10,000	\$0
Family Membership The Family Membership is a one-time payment of \$10,000. It entitles the member to all the benefits of membership for the remainder of their life. It includes up to four family members.	\$10,000	\$0
Student/Post-Grad The Student/Post-Grad Membership is a one-time payment of \$1,000. It entitles the member to all the benefits of membership for the remainder of their life. It is available to students and post-graduates.	\$1,000	\$0
Regular The Regular Membership is a one-time payment of \$100. It entitles the member to all the benefits of membership for the remainder of their life. It is available to all members.	\$100	\$100
Corporate The Corporate Membership is a one-time payment of \$1,000. It entitles the member to all the benefits of membership for the remainder of their life. It is available to corporate members.	\$1,000	\$1,000

General Category Descriptions

Category	Description
1	Accounting
2	Business
3	Education
4	Finance
5	Health
6	Insurance
7	Law
8	Marketing
9	Real Estate
10	Technology
11	Transportation
12	Utilities
13	Other

Position Category Code

Code	Description
1	Member
2	Student/Post-Grad
3	Family
4	Life
5	Corporate

Area of Interest Codes

Code	Description
1	Accounting
2	Business
3	Education
4	Finance
5	Health
6	Insurance
7	Law
8	Marketing
9	Real Estate
10	Technology
11	Transportation
12	Utilities
13	Other

Best practices: Acquisition/Outreach

- Design issues and tone
 - Two color: good stewardship, higher response
 - Foldouts emphasize what someone *really* gets
 - Get away from the crowded pocket folder—easy to store/read, low expense justifies repetitive contact
- Need to consider the role of the brochure
 - Mission: delivery system for painless contact
 - Fits within an overall communications mix and milieu
 - Typically driven by word of mouth: auditory vs. visual
 - The few outreach to the many > mass market
 - Mass marketing techniques support existing WOM
- Real test comes when reviewing the application
 - Tool to close the sale, translate awareness into action

Best practices: Materials/forms design

- Balance need for data collection and marketing
 - Forms need to be easy to fill out
 - Single biggest deterrent to response: apparent difficulty to complete
 - A 'delayed response' is often a non-response
 - DM lessons: reply form is #1 driver of any collateral
 - Can use as a handout, but most effective are:
 - Prepopulated forms—easy to complete and return: conveys that it was meant for you
 - Clarifies the offer—price, basis, terms & conditions: statement of ethics, references, processing fees
 - Subliminally appreciated—tells them WHAT YOU WANT
 - Often materials are shy, hide the offer, or speak in generalities ... the reply 'means business'
 - Still critical even in the web era .. Mail drives web traffic but call to action should push website, inbound calls



*Founded more than
60 years ago, the
American Society of
Appraisers is the world's
oldest and most widely
respected multidiscipline
society of professional
appraisers.*



International Headquarters
American Society of Appraisers
P.O. Box 13366
Washington, DC 20044-0266

March 1998

Mr. Lowell
5305A Shepherd Drive
Waldorf, MD 20602

Dear Mr. Lowell:

I want to extend to you this invitation to apply for membership in the American Society of Appraisers (ASA)—the premier professional appraisal society, representing more than 6,000 appraisers from all disciplines.

Once you become an ASA member, your clients will recognize your superior qualifications . . . your professionalism . . . and your commitment to high ethical standards. You'll be affiliated with the most prestigious multidiscipline association of appraisers worldwide.

I encourage you to join today and set yourself apart from the competition . . . expand your client base . . . and increase your earnings. But that's not all. Here's what becoming a member of ASA will do for you:

ASA Will Help You Succeed

Work Smarter: ASA's courses and educational seminars will help you boost your productivity, your know-how and your bottom line. These practical, hands-on courses will give you tools and appraisal methods you can use every day. Courses are offered for beginner and advanced levels at a variety of locations across the U.S.

Gain Referrals: As an accredited ASA member, you can take advantage of some of the more than 15,000 referrals ASA gives to appraiser candidates through its toll-free



American Society of Appraisers
International Headquarters
P.O. Box 17285 • Washington, DC 20044-0285
Phone: (800) ASA-VAL1 or (703) 478-2228
Fax: (703) 743-8473, E-mail: asmemb@aso.com
Internet: www.appraisers.org

Membership Invitation

YES! I accept your invitation to apply for membership in ASA

CODE 3064

NAME & ADDRESS

(Please type or print clearly with a ballpoint pen)

Name of Appraiser (omit professional title/ASA/DO title)

Business Address

Company _____
Address _____
City, State, ZIP, Country _____
Business Phone _____
Fax _____
Web Site Email _____
Social Security # (optional) _____
DOB Date (optional) _____

Alternative Mailing Address

(Use only if you don't want mail sent to your work address)

Address _____
City, State, ZIP _____

APPLICATION FEE

A \$100 Candidate Application Fee (non-refundable) MUST accompany your completed application form. **DO NOT send any other funds at this time.** An invoice for international and chapter dues will be issued upon receipt and approval of your application.

PAYMENT METHOD

Check enclosed for \$100 (Payable to ASA)
 Charge \$100 to my:
 VISA
 MasterCard

ACCOUNT # _____
EXPIRE _____
SIGNATURE _____

Complete BOTH SIDES of this form and mail by June 30, 1998, with application fee to:
American Society of Appraisers
P.O. Box 1638
Merrifield, VA 22116-9979

FOR OFFICE USE ONLY

Chapter _____
Region _____
Account # _____

Please complete the back side of application.

OVER PLEASE >

Hard to customize.
'Prestige' soft sell.

Working within constraints:
federation structure, local level approvals.

MEMBERSHIP APPLICATION

Complete the front side of this application form, and be sure to sign and date the Membership Agreement below.

Provide three business references

(Address and phone numbers must be complete.)

1. NAME OF REFERENCE _____
PHONE NUMBER _____
STREET ADDRESS _____
CITY, STATE, ZIP _____

2. NAME OF REFERENCE _____
PHONE NUMBER _____
STREET ADDRESS _____
CITY, STATE, ZIP _____

3. NAME OF REFERENCE _____
PHONE NUMBER _____
STREET ADDRESS _____
CITY, STATE, ZIP _____

Provide three personal references

(Address and phone numbers must be complete.)

1. NAME OF REFERENCE _____
PHONE NUMBER _____
STREET ADDRESS _____
CITY, STATE, ZIP _____

2. NAME OF REFERENCE _____
PHONE NUMBER _____
STREET ADDRESS _____
CITY, STATE, ZIP _____

3. NAME OF REFERENCE _____
PHONE NUMBER _____
STREET ADDRESS _____
CITY, STATE, ZIP _____

APPRAISAL DISCIPLINE

Please check your most significant appraisal discipline (Choose only one.)

- Appraisal Review & Management
 Gems & Jewels
 Personal Property
 Business Valuations
 Machinery & Technical Specialties
 Real Property

ANNUAL DUES

You will receive a printed dues invoice when your candidacy has been approved.

Annual U.S. dues are as follows:

- Candidate \$305
Accredited Member (AM) \$580
Accredited Senior Appraiser (ASA) \$580

(Chapter dues are \$25. In addition, some chapters have an assessment fee.)

MEMBERSHIP AGREEMENT

The undersigned applicant certifies that he/she is either (1) employed in the appraisal profession or (2) interested in becoming an appraiser. The applicant further agrees to take and pass the society's examination in the Principles of Appraisal Practice and Code of Ethics within one year of acceptance into Candidate membership. In addition, the applicant agrees to complete the 15-hour course for the Standards of Professional Appraisal Practice (SUPAP) within two years of acceptance into Candidate membership.

I hereby certify that the statements contained herein are correct and, if related to membership, I agree to abide by the Constitution, Bylaws, and Administrative Rules of the society and its Principles of Appraisal Practice and Code of Ethics.

Agreement of Applicant: _____ Date: _____

Complete BOTH SIDES of this form and mail along with payment to:
American Society of Appraisers
P.O. Box 1638
Merrifield, VA 22116-9979

Have you ever been convicted of a felony? Yes No

6. Accountability/Financial Management

- Past surveys of membership departments:
- Membership = relationship management department
- Often financial models do not place membership as the true "center of the universe"
 - Servicing costs may not be known
 - Membership expenses as a line item is seen to include governance expense
 - Cost of doing business is included with membership—residual that includes everything else
 - Some legitimate membership expenses (i.e. chapters or research) are included de facto but not itemized
- End result, fuzzy tracking for a broad issue that is seen by shorthand to be a 'catch-all'
- Lack of activity based costing also distorts true margin

Best practices: Testing Impact on Results

	A: Original	B: Token	C: Letter
# Mailed	364,945	150,000	50,000
% Response	0.71%	1.23%	0.77%
Average Gift	\$36.48	\$23.73	\$55.52
Revenue/000	\$257.26	\$292.99	\$424.76
CPDR (\$/dollar)	\$1.38	\$1.54	\$0.93



A

B

C

7. Program Development

- **Role**: Ensures we have right “product,” what is being communicated has to be strong to attract prospects, building blocks for the value proposition.
- **Concerns**: How to review member services: importance and effectiveness, compare relative value, guide resource allocations, sunset review and procedures for declining services, assortment management. Addressing paradox of choice.
- **Metrics**: financial expense and revenue, margin, presence/absence of superior alternative investments.

700 member Trade Association: core benefits

- RSA Convention
- RSA Trade Show
- *IMPACT seminars*
- *RSA University*
- Consumer promotions/Local Marketing Toolkit*
- Pepsi program
- *Promotions packet*
- RSA magazine
- *RSA Today* monthly newsletter
- RSA Section regional meetings
- Information on www.rollerskating.org
- RSA worker's comp insurance*
- RSA liability/property insurance*
- Music licensing discount programs*
- Group purchasing programs*
- RSA products

Program
Categories

“Golden
Handcuffs”

Affinity
Programs

Core Services

* potential golden handcuff

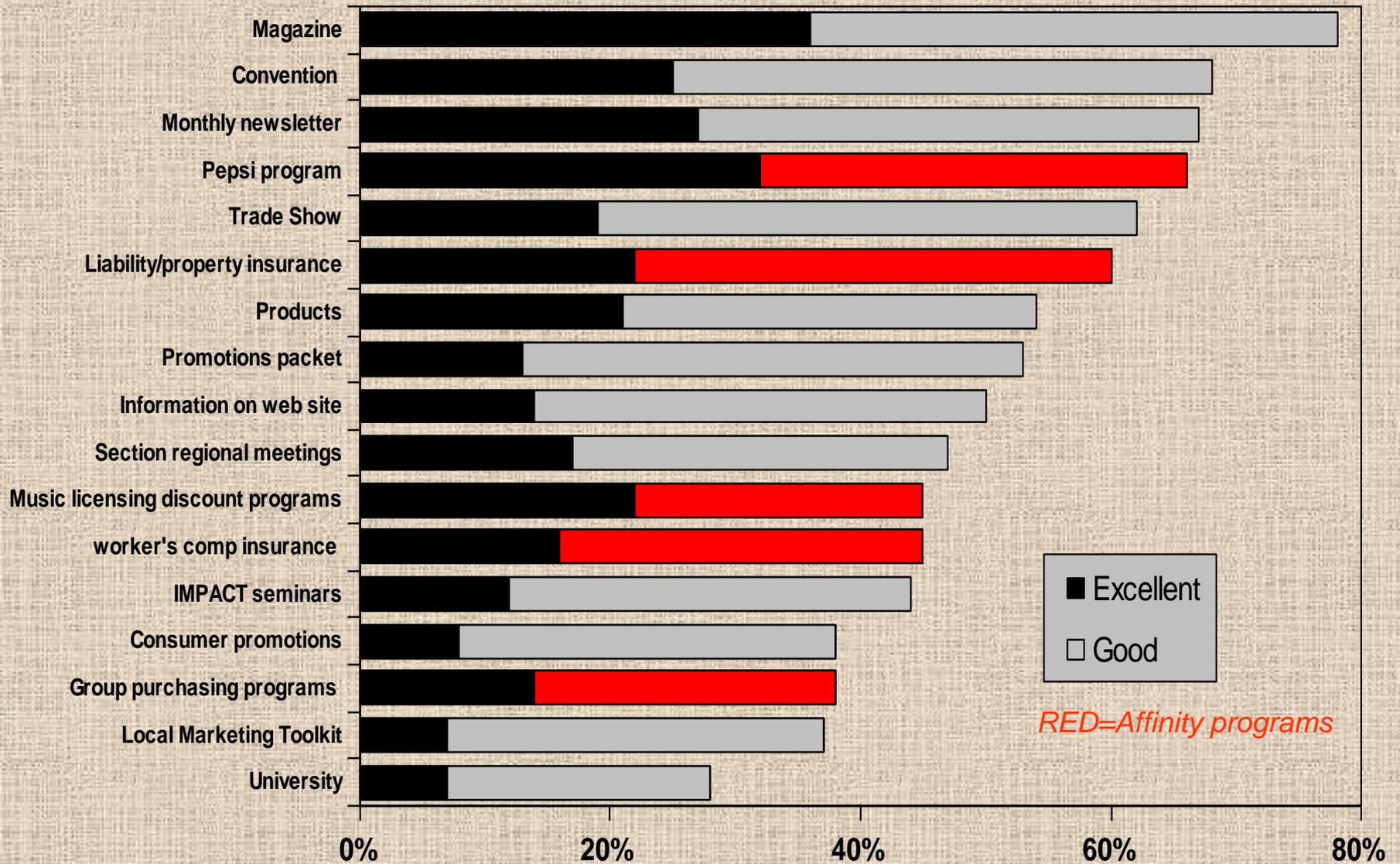
xxx: potential core/sunset

Note: member usage, perceptions = distinction between potential and actual

8. Research/Data Collection

- Primary (quantitative & qualitative) and secondary
- Mix of surveys, personal interviews, "lit review"
- Needs to provide answers to key questions
 - What does your audience care about most .. Least
 - Tangible benefits and intangibles (culture, image)
 - What is the contribution of each service to overall value
 - How do they prefer to be communicated with
 - Behavior: what/how much do they use, read, visit?
- Focus on both members *and* non-members
 - Non-members have opinions too
 - If you have an 80% retention, at least 20% each year are new (if you're lucky!)
 - The non-member population often includes former members, others with meaningful exposure

Best practices: Monitoring performance/satisfaction

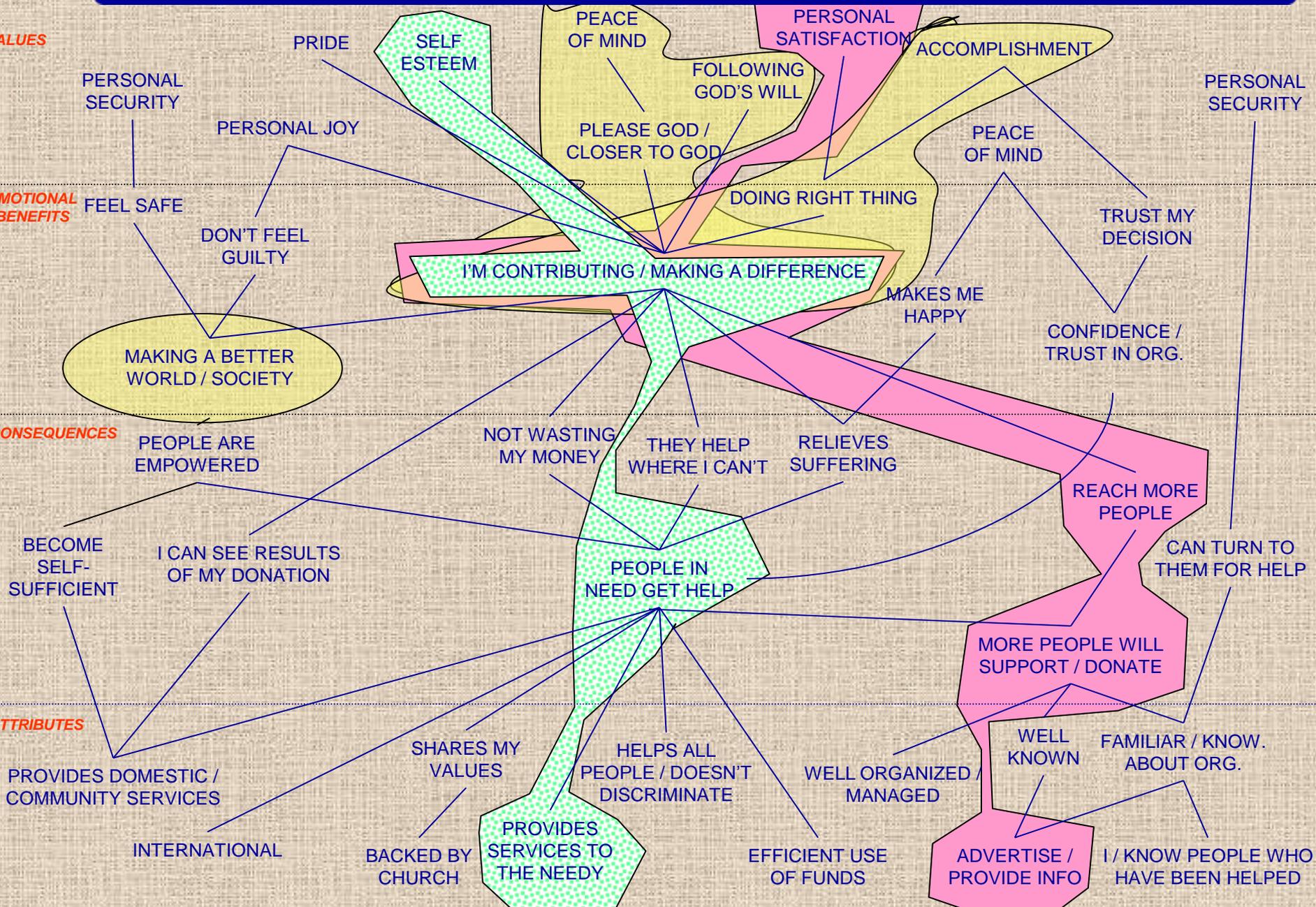


VALUES

EMOTIONAL BENEFITS

CONSEQUENCES

ATTRIBUTES



9. Database Management

- Your central database is often an untapped resource
 - Central repository for correct information ...
 - Single most important factor in DM readability, how we treat your record is how we treat you
 - Data mining potential: pattern recognition opportunities for queries, reports, what if projections
 - Linking touches, purchases, participation to outcomes such as renewal performance
 - Contact management features: facilitate CRM, specialized touches for new members, 'at risk' members
- Necessary capabilities
 - Requires training in computers/database
 - May require downloads into better tools:
i.e. Microsoft SQL used at Texas Medical Assn.
 - Sometimes a change in software

“All I ever hear about is people complaining about iMIS and yet nobody moves on.”

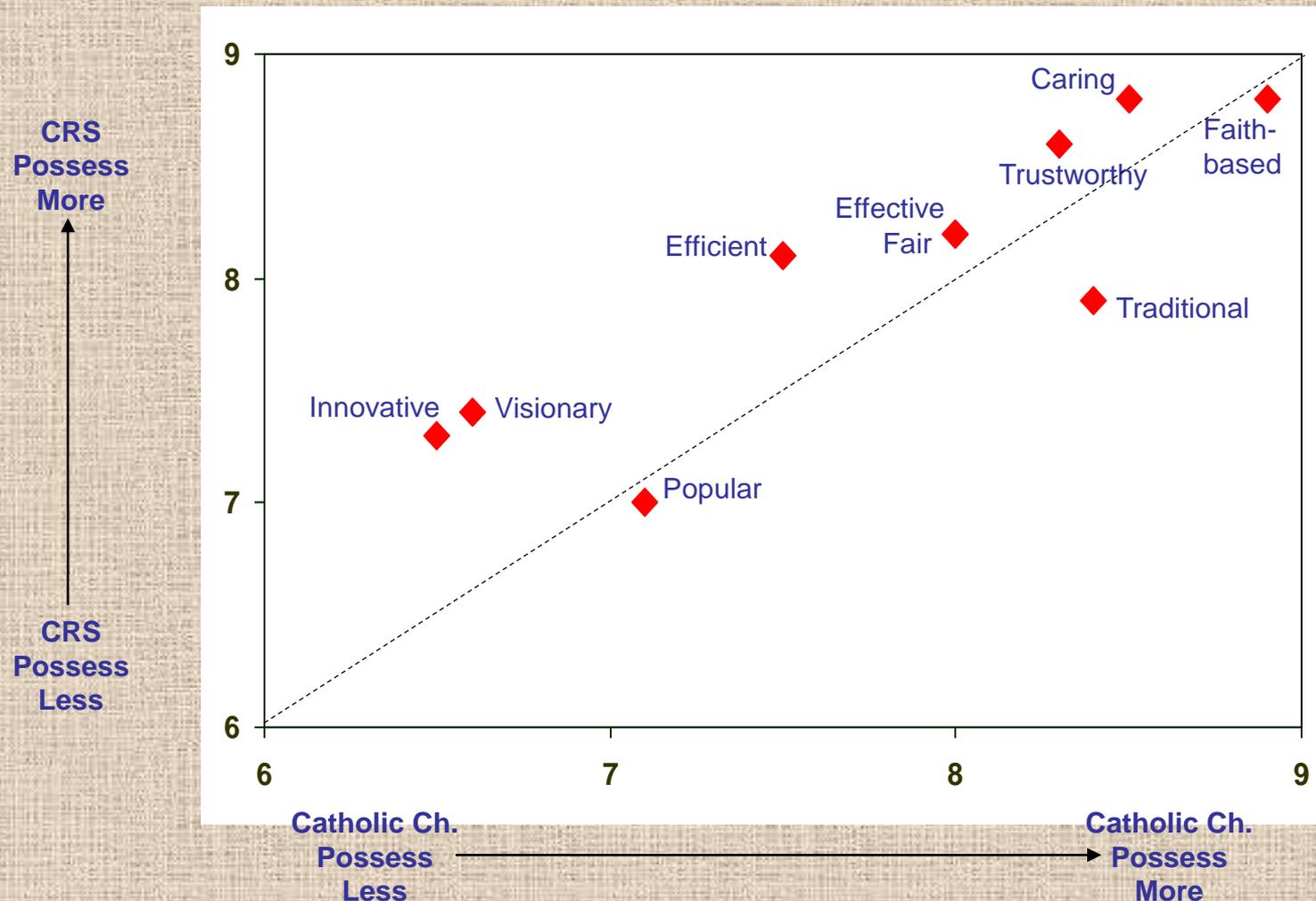
10. Image/Positioning

- Positioning is how you define your place in a competitive space
 - “What you are in the minds of your audience”
 - Combining logical and emotional appeals
 - Aggregate values
 - Clustering and segmenting external audiences in terms of their beliefs and needs
 - Linking to a brand
- Illustration of tools on following page
 - Measurement of beliefs, absolute and relative to competition



Leadership Traits Performance – CRS & Catholic Charities

Performance - “Now, I would like you to rate Catholic Relief Services / Catholic Charities on how well it has or possesses the characteristics we just talked about. Please use this scale, where 1 = Does Not Possess at All and 10 = Totally Possess



Best Practices: Tie membership to bigger picture

- Helpful to adopt a framework such as 7 Measures of Success

Commitment to purpose

- Customer service culture
- Alignment of products/services with mission

Commitment to analysis & feedback

- Data driven strategies
- Dialogue and engagement
- CEO as broker of ideas

Commitment to Action

- Organizational adaptability
- Alliance building

- Focus on areas with direct impact: changing industry or profession
- Mass change represents changes of many single people and companies

11. Change Agent

- Consider short-term/long-term structure/needs
 - Membership function needs to be productive in *today's* environment & structure
 - ... while preparing for a better future
 - We so often evolve organically, unlikely we are optimal
 - Ways to determine and document this:
 - Benchmarking: comparisons to others in key metrics:
 - Proportion who use a specific service
 - Ratio of member to non-member attendees
 - Ratio of attendees to total members
 - Typical financial performance for events
 - Usage and finance of major member benefits
 - Satisfaction & importance measures
 - Consultants: structured evaluation focused on you
 - ASAE now has > 400 Consultants Council members

Best practices: Assessing new trends

- Helpful to look at past fashion that has faded
 - Many 'Millennium Membership' principles
 - ASAE 'Supertrends' from strategic research
 - Structures: mass customization/customized membership
- Today: social media & generational marketing
 - Possibly a distraction
 - Critical to tap into markets with tools that reinforce existing communities: join & link instead of create
 - Distinguish between bloggers, other active member niches
 - Content developers, volunteer leaders, member recruiters
 - Determine if the new cadre are connectors, influentials
 - Opinion leaders, early adopters ... or too much time on their hands