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the Membership Management report

THE MONTHLY IDEA SOURCE FOR THOSE WHO RECRUIT, MANAGE AND SERVE MEMBERS.

Some of What's Inside…

Identify and Nurture Members' Special Interests

What special interest groups make up your membership? How many individuals exist within each group? Are the groups organized? Do they meet autonomously?

Increasing numbers of member organizations are identifying groups with similar interests and developing programs to nurture and support their interests. Here's a simple three-step outline to identify and cultivate member affinity groups:

1. **Identify and prioritize special interest groups.** Exploit every means available (surveys, focus groups, one-on-one meetings) to identify member interests, then prioritize them based on number of members aligned with each interest. Once you do so, make a commitment to formalize affinity groups for those on the top of the list.
2. **Offer opportunities for special-interest networking.** Accommodate each special interest group in a variety of ways: provide meeting space, assist with a special-interest newsletter, make space available on your website, host events and more.
3. **Include opportunities to become more involved with your organization.** In addition to affinity group activities, incorporate additional involvement opportunities for those members to help them buy into your programs and activities.

Use Omni-Channel Communications To Increase Retention Rates

By Megan Venzin

E-mail may be the most preferred method of communication today, but it should never be relied upon as a sole point of contact for associations. However, in hopes of keeping up with trends and satisfying member preferences, many associations are making this misstep — and it is costing them dearly. When Population Association of America (PAA) noticed flat renewal rates, they hired Scott Oser Associates (North Potomac, MD) to assist them with a complete overhaul of their engagement and retention strategies.

"Associations need to make sure they are going back to the basics, or they're certain to miss the low-hanging fruit," says Owner Scott Oser. "Clean data, an omni-channel approach to outreach and message testing are imperative for increasing retention rates."

Prior to working with Scott Oser and his colleague, Kevin Horton, PAA relied on their reputation and industry standing to attract new members. They've learned that even when dealing with an audience of specialized professional researchers, it's important to have a more proactive approach to membership management. "We're personalizing e-mails and targeting different members by segment," Oser says. "A student and a career research scientist are certain to have different needs, which is why we're starting from scratch and helping PAA create a renewal schedule and process that works for every kind of member."

Here are a few ways that Oser hopes to improve retention rates and engagement for PAA:

1. **Create a multitouch communication strategy.** "Being a virtual organization, it's easy to see why PAA relied on e-mail communications to inform members of upcoming renewals, but there's a stronger way," Oser says. "We're starting 120 days out by sending an advance e-mail notification to let members know that they are approaching expiration. We're also including some direct mail pieces and a phone call so members are actively engaged on a more consistent basis."
2. **Streamline the renewal process.** A quick and easy renewal process can lead to higher retention rates. PAA's shortened renewal form will be accessible via a personalized link."We want to make this a two-step process, in which details like name and billing address are already pre-populated in a form so members just have to click a few buttons to renew," Oser says.
3. **Implement automation.** "PAA is using a system called INFORMS to improve engagement through marketing automation," Oser says. "Being able to write copy ahead of time and target segments during renewals will help save the staff time and ensure that certain members are receiving only the most relevant communications."

Source: Scott D. Oser, Owner, Scott Oser Associates, North Potomac, MD. Phone (301) 279-0468. E-mail: scott@scottoserassociates.com. Website: www.scottoserassociates.com

Encourage Members To Take Creative License

Do you produce a monthly or quarterly publication? Then why not create a section written by your members? It could be an opinion column regarding membership events and/or benefits, or a feature discussing happenings within the community. Not only will it get members excited about reading the publication but it will give them an outlet to express themselves.

Depending on your members' interest, you can designate members to write the column or give each member an opportunity to write an article on a rotating basis. It will not only help your staff fill the space but also add a fresh perspective to each issue.

Membership Renewal Tip

Remove options below current membership levels in your annual renewal notices. Offer the member a special premium for advancement to a higher membership level.

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Evaluate Your Member Renewal Procedures

When it comes to your membership numbers, signing up new members is only half the battle. The other is retention — getting your members to renew their memberships and stay with your organization. Jessica Roberts, associate executive director of strategic initiatives for the University of Maryland (UMD) Alumni Association (College Park, MD), and Jessica Sousa, director of membership for the Cambridge Chamber of Commerce (Cambridge, MA), share how they keep their existing members on board.

In the realm of member renewals, having a process is everything. According to Roberts, the UMD Alumni Association has a five-month process for reminding members to renew, which starts three months before their renewal date. "We send out five solicitations. We start three months before renewal, send one two months before, one during the renewal month, one a month after their membership expires, and one two months post-expiration."

Roberts notes that they change up the method of contact by month, saying, "We try to stagger our process by sending an e-mail one month and a letter the next month so members aren't being bombarded with reminders."

The Cambridge Chamber staff have a similarly ongoing process, according to Sousa. "We send members a mailing a couple of months before the need to renew, then if they don't renew we follow up with an e-mail, and if they still don't renew we follow up with a call."

While Sousa and her team use direct mailings, e-mails and calls to get in touch with members who need to renew, Roberts and her team only utilize e-mail and mailings, noting that they used to call members but don't anymore.

Both Sousa and Roberts say that their processes are effective, though Roberts has a goal of moving the Alumni Association retention numbers from 55 percent to 70 percent. Of the renewal reminder methods, Roberts mentions that "mail is more successful, which is interesting. We get an e-mail response of about 3 percent, and a direct mail response of 10 percent." Her conclusion? "We need to do direct mail. People are still responding to it."

Sources: Jessica Kline Roberts, Associate Executive Director, Strategic Initiatives, University of Maryland Alumni Association, College Park, MD. Phone (301) 405-7081. E-mail: jrobert3@umd.edu. Website: alumni.umd.edu/

Jessica Sousa, Director of Membership, Cambridge Chamber of Commerce, Cambridge, MA. Phone (617) 876-4104. E-mail: jsousa@cambridgechamber.org. Website: www.cambridgechamber.org/

Choose From Five Simple Ways to Recognize a Member

Representatives of membership organizations know that retaining members is a critical key to the success of the organization. And sometimes, the simple gestures can be the most meaningful.

Try these simple suggestions for making your members feel special:

1. Acknowledge the member's birthday with a call or a card.
2. Feature a member in each issue of your newsletter, emphasizing his/her specific, unique contributions to the organization. Consider a question-and-answer format for an "easy read," along with a flattering photo.
3. Invite the member to speak at an upcoming meeting.
4. Create space on your website or at your office/facility for members to share thoughts and ideas.
5. Make a goodwill phone call totally unconnected to upgrading membership or any other business of the organization. Simply call and ask the member if there's anything the organization can do for him/her and say, "Thanks for being a member."

Seek Testimonials From Current Members

By Erin Sandage

An organization's members are its best resource. For the past decade the American Osteopathic Association (AOA) has used a Member Testimonial Form, either in print, PDF or digital form, to gather information from its members to help promote its current and future programs. The form was created by the AOA, and its language was reviewed by the AOA's in-house general counsel.

Amy J. Snyder, associate vice president, brand marketing, shares how and why the AOA uses its membership testimonial form.

Why seek testimonials from members?

"It's vital to stay informed about and connected to the medical community we serve, and member testimonials are an important tool to gauge what's working and what's not. Testimonials are also invaluable as a credible external validation of the value our doctors find in being an AOA member. While it's beneficial to advertise your organization, when a member sings your praises, it resonates more strongly. An effective member testimonial can amplify achievements and encourage ongoing participation."

How do you use the member testimonials?

"Member testimonials serve many purposes. In some cases, testimonials support advocacy and health policy efforts, as in the Osteopathic Recognition video, which features our medical students discussing the value of an osteopathic education and clinical training. In other cases, testimonial collection may support a marketing project or PR campaign.

"Testimonials are crucial in building a sense of trust and community among AOA members, and especially in recruiting new members. They are used throughout AOA communications — on our websites, in printed materials, on social media and in videos."

How did you choose the form's questions?

"Our questions tend to be fairly open-ended so we can learn more about what matters to our diverse, vibrant constituency. Since our services range from CME to board certification, professional development to practice management, it's important for us to let the members identify their most-valued benefits and how we can enhance and expand those opportunities."

How many of these completed forms do you get during a year?

"It varies greatly, depending on whether we are actively seeking feedback for a campaign. We typically receive between dozens and hundreds in a year. Even though some are not fully completed, they still serve as a starting point for engagement with our members. As a member-based organization, this is critical to our ongoing success."

Besides your website, do you seek testimonials in other ways?

"The AOA also proactively collects testimonials online through our social channels as well as more traditional methods such as e-mails to members. We also keep a central database that captures incoming feedback from members. This is especially helpful for the communications team, who frequently seeks content ideas for our websites."

Source: Amy J. Snyder, Associate Vice President, Brand Marketing, American Osteopathic Association, Chicago, IL. Phone (888) 626-9262. E-mail: asnyder@osteopathic.org. Website: www.osteopathic.org

AMERICAN OSTEOPATHIC ASSOCIATION

TREATING OUR FAMILY AND YOURS

What Has the AOA Done for You Lately?
AOA Member Testimonial Form

The AOA prides itself on being the professional family for DOs and osteopathic medical students by offering numerous services and benefits exclusively for its members.

As an AOA member, we hope that you have taken full advantage of the many services and benefits available to you. We also hope that you have turned to us for assistance when you faced a dilemma during your career whether it was discrimination from a potential employer because of your DO credentials to an inaccurate portrayal of DOs and osteopathic medicine in the media to problems with coding and reimbursement issues.

If the AOA has helped you deal with a challenging issue, let us know. Through your testimonial, the AOA can show other members and potential members the value they receive by choosing to be a part of the AOA family. If you would like the AOA to consider using your testimonial for our membership outreach efforts, please take a few minutes to answer the questions listed below. If you need additional space, attach a separate sheet of paper.

How did the AOA help you?

When it comes to the assistance the AOA provided, what stands out (i.e. professionalism of the staff, the amount of time it took to resolve the dilemma, etc.)?

What would you say to a colleague, who was not currently an AOA member, about the association?

How many years have you been an AOA member?

AOA Member Testimonial Release Consent

Purpose of Consent: The American Osteopathic Association (AOA) intends to use your testimonial and others in promoting its membership services, including use of the testimonial on AOA Web sites; in marketing materials such as brochures, renewal letters, dues bills, and direct mailers; and in AOA electronic communications. By signing this form, you are consenting to the AOA's use and disclosure of your name and the information in your testimonial and acknowledge that the testimonial may be used in AOA membership outreach efforts.

Right to Revoke: You have the right to revoke this Release at any time by giving us written notice of your revocation and submitting it to the Contact Person listed below. However, please understand that revocation of this Release will only affect the ongoing use of testimonial statements. It will not affect any action the AOA took in reliance on this Release before receiving your revocation.

CONSENT TO RELEASE

I hereby authorize the AOA to use my name and testimonial and any information in the testimonial in its membership outreach efforts. I understand and authorize the disclosure by the AOA of testimonial information in brochures, publications, Web sites, marketing materials and electronic communications. I specifically authorize the AOA's release of testimonial information to any other entities that may be involved in the AOA's membership outreach efforts.

I waive the right of prior approval and hereby release the AOA from all claims for damages of any kind based on the use of my testimonial or information in the testimonial.

I freely sign this release, which I have read and understood.

Signature　　Print Name

AOA Number　　Date

Please provide your contact information.

Address Line 1　　____Home　　____Business

Address Line 2

City, State, and ZIP code

Phone　　Fax

Email

Please send the completed form to: American Osteopathic Association, Communications Department, 142 E Ontario; Chicago, IL 60611 or email to webeditor@osteopathic.org.

DOI: 10.1002/MMR VIEW THIS NEWSLETTER ONLINE AT WILEYONLINELIBRARY.COM

How an Exit Survey Can Recharge Your Membership

Exiting or lapsed members may be the most useful resource when it comes to information about how to retain current members. Consider surveying them to help improve your membership program.

Often the reason for a member's leaving may be due to a change in employment or a move. Regardless of the reason, many soon-to-be-former members can offer thoughts on improvements your organization could make.

Most membership organizations are highly skilled at surveying current members, but not so with exiting or lapsed members — perhaps because of the fear of hearing anything negative. But in reality, taking the time to listen to exiting members can help make an organization grow stronger.

What's the easiest way to obtain information? Offer the exiting member a simple questionnaire using a multiple-choice checklist for answers whenever possible. The key is keeping the process simple — long, laborious questionnaires simply will not be completed.

Here are key questions to ask in a member exit survey:

1. What is the main reason you are leaving the organization?
2. Did the membership fulfill your needs? If not, please briefly explain why.
3. Are membership dues affordable?
4. Was our volunteer staff friendly, courteous and knowledgeable during your membership?
5. Would you recommend membership to others? If not, why?
6. What are three ways that we can improve?

The best and most expedient way to contact exiting members is through phone interviews or e-mail surveys. Both are low-cost options.

Contact exiting members as soon as you learn of their requests to leave the organization. Make the survey brief, ask if you can send membership updates in the future and thank them for their prior membership. This can go a long way in leaving that member with a positive lasting impression of your organization.

Should You Offer a Rewards Credit Card for Members?

Some people show school spirit by wearing a shirt; others show it with their spending. Stanford University (Stanford, CA) is giving alumni an opportunity to do the latter, plus rack up valuable rewards points for merchandise, travel, gift cards and cash back while they're at it. Through a partnership with Stanford Federal Credit Union, the university's graduates are invited to apply for the Stanford Alumni Rewards Visa® credit card. Using this card is one way alumni can show support for their alma mater while also receiving access to benefits like no annual fees, no foreign transaction fees and unlimited rewards points.

"The alumni rewards credit card serves as another touchpoint for alumni because they are reminded of their time at Stanford every time they swipe their card," says DeRonnie Pitts, senior manager of membership and partnerships for Stanford Alumni Association. The credit card is an obvious awareness-building tool for Stanford University, but it also provides alumni with a chance to secure a credit line and other benefits from a reputable financial institution. The university receives financial compensation for offering and marketing the card to their population. In this case, Stanford Federal Credit Union and Stanford University have agreed upon a set of marketing assets which have been packaged for the partnership. Stanford University provides access to things like university magazine ads, e-mail lists and designated times for on-campus financial seminars in exchange for an annual fee paid by the credit union. This fee allows Stanford Federal Credit Union to license the Stanford Alumni Association's official imagery on the alumni rewards credit card. "For us, it was really a no-brainer," Pitts says.

Pitts suggests exploring the following questions before offering a credit card to your members:

- Is a rewards credit card something your members are likely to use?
- What creative ways can you use a rewards credit card to cross-promote events/purchases for your organization (e.g., offering bonus points for members who use the credit card to pay for annual conference fees, homecoming tickets, etc.)?
- Does the partner financial institution offer an incentive model that makes sense for your nonprofit?
- Does the partner financial institution have a good reputation among your members?
- Do you have the rights to license your imagery/logos to the issuing credit card company for a fee?
- Can you demonstrate with demographic information or other data that offering a rewards credit card is a worthwhile investment for the partner financial institution?
- Can points be used for rewards that directly promote/tie back to your organization (e.g., merchandise, university sports tickets, organization-wide events, etc.)?

Source: DeRonnie Pitts, Senior Manager, Membership and Partnerships, Stanford Alumni Association, Stanford, CA. Phone (650) 725-9425. E-mail: deronnie.pitts@stanford.edu. Website: www.alumni.stanford.edu

Share Government Relations Efforts With the Media

Many member organizations have a legislative committee that focuses on reaching out to government officials and researching legislative issues affecting the organization.

Let your media contacts know about your government relations efforts.

Whether you have recently engaged in a letter-writing campaign to a local representative or met face-to-face with your mayor, senator or state/national representative, reach out to the media to highlight these efforts. Create a press release detailing your campaign or write an article on your experience meeting with a local representative and send it to local papers. Doing so will bring attention to your members' efforts and to the legislative issue at hand. It may spark further discussion about the topic.

You may even inspire other like-minded organizations to join your efforts.

Insight into Conducting Qualitative Member Interviews

Whether you are seeking to improve satisfaction, increase renewal rates or overhaul your benefit packages, member input is the most valuable resource you can tap. While routine surveys may help you stay on track for reaching goals, qualitative research is more likely to reveal your association's strongest challenges and opportunities.

"The goals you have for your research project will drive everything that follows — the methodology you use (whether quantitative or qualitative), the questions you ask, which segment of members you ask and the outcome of the study," says Chief Path Finder at Kaiser Insights LLC Amanda Kaiser. "It is critical that any association starting out on a new member research project define between one and three goals they intend to achieve." To determine those goals and apply the most appropriate research strategy, Kaiser recommends associations ask themselves the following questions:

1. What problem do we need to solve?
2. What will we do with the results?
3. Whose opinion do we care about most?
4. What kind of resources do we have for this project?

Kaiser recently used this strategy when working with an association tasked with revisiting its strategic planning process. In an effort to better serve members during challenging times, Kaiser and association leadership first defined the following research goals:

- Understand members' current challenges.
- Uncover any potential barriers responsible for preventing deeper member engagement.

These goals indicated that in-depth member interviews would be the best method for data collection. By asking their audience 12 key questions (including "What is your biggest professional challenge right now?" and "If you became the CEO of the association tomorrow, what is the first thing you would focus on?"), Kaiser was able to identify a pattern of hot topics and trends voiced repeatedly by existing members. After analyzing more than 40 pages of comments, Kaiser took note of similar responses and key quotes to identify the strongest concerns and areas for growth. From this data she identified the following key points:

1. Influence is a key challenge for members.
2. In-person events and annual conferences provide the most value.
3. On-boarding is successful but could still use improvement.

About half of the insight collected included responses that the association anticipated, while the remaining research presented some surprises. "Whether new news or confirmation, they now had complete data that allowed them to move forward quickly," Kaiser said. "The board also has the research results, and they are currently developing the strategic plan based on these insights."

Source: Amanda Kaiser, Chief Path Finder, Member Informed Strategy, Innovation and Marketing, Kaiser Insights LLC. E-mail: akaiser@SmoothThePath.net. Website: www.SmoothThePath.net

CAREER MANAGEMENT

Hone Member Management Skills With Ongoing Education

What steps are you taking to stay on top of your game, career-wise?

One way to do so is through continuing education. Receiving ongoing education can enhance your career. Earning or advancing your degree may enable you to become eligible for a promotion or raise. A degree will likely help you become more successful in your current position as well.

If earning a degree isn't viable at the moment, attend seminars or workshops to stay current and informed on work-related issues. Document your education, as well as seminars attended, and refer to this during any evaluation or job review.

Assemble a Mentoring Team To Encourage Participation

Member engagement is at the top of many membership organizations' challenges list, and member benefits are a close second. Check both off the list by creating a mentoring program.

The Greater Vancouver Chamber of Commerce (GVCC) recently implemented a mentoring program for its members. The program assigns a mentor, who is a GVCC member in good standing, to a member on its at-risk report. Although some members on the list are great supporters, it gives the chamber a starting point, says Matt Hoffstetter, membership services director. The mentee becomes actively engaged in the chamber and also receives the benefit of his or her mentor's professional skills.

The GVCC recruited six mentors to start the program. Each possessed skills in areas that move business or individuals forward, explained Hoffstetter. These areas include leadership development, community partnerships, nonprofit coordination and management and digital marketing, to name a few. "We recruited members with areas of focus in mind. Moving forward we will interview applicants and see if they possess a skill that will add value to the program," Hoffstetter said.

Once chosen, the mentors were given a list of possible mentees. They chose their top five candidates, and the chamber reached out to the mentees on their behalf. Once matched, the mentor and mentee were encouraged to meet at least three times during the mentor's three-month cycle. "The first meeting can be a meet and greet / needs assessment. The second can be a tour or coffee meeting. We get gift certificates from member coffee shops to provide gift cards. The third can be at a chamber workshop, or networking event; we comp both the mentor and mentee registration," he said.

The GVCC Mentor Team meets as a group at least once a cycle. As the team captain, Hoffstetter reminds them to meet their mentees, looks for additional mentors and keeps his eyes open for new mentees.

Source: Matt Hoffstetter, Membership Services Director, Greater Vancouver Chamber of Commerce, Vancouver, WA. Phone (323) 857-6000. E-mail: MHoffstetter@vancouverusa.com. Website: www.vancouverusa.com

Pre-Conference Planning Tips

Pre-conference planning should cover these four essentials:

1. Determine the primary and secondary purposes of the meeting.
2. Consider the group size, gender mix and ages, geographical make-up and career disciplines of those you hope to attract.
3. Determine when and where the meeting should be held to maximize attendance.
4. Plan the meeting as far in advance as possible.

Conference Planning Tips

Budget considerations — When planning a conference, take these key budget issues into consideration:

- Distinguish which expenses will be assumed by the meeting sponsor versus those assumed by attendees.
- Create a balance sheet that outlines all anticipated revenue and expenses.
- If possible, check budgets from similar meetings to gauge costs.
- Make sure funds are allocated to pay all suppliers, and establish a holding account for accrued program expenses.

Make Recognition Special

Searching for a theme for your next member appreciation event? Use the following checklist of ideas to get the creative juices flowing:

- *We're Your No. 1 Fans* — Treat each member like a Hollywood celebrity. Make Oscar-like awards.
- *Annual Stock Holders' Meeting* — Present a program based on the dividends provided as a result of member investments.
- *Angels in Disguise* — Incorporate angel decorations and awards into your program.

Awareness-Building Actions

To generate more publicity for your organization, consider launching an annual awards program geared to those outside of your membership: business of the year, community service award, senior citizen of the year, etc.

Three Ways to Make Face Time With New Members

After a person decides to become a member of your organization, there is a critical period of time in which contact should be made. After all, they've decided you have something that can provide them value, and now it's your job to show them. While a welcome e-mail or a phone call should be extended, creating opportunities for face time with new members can help instill confidence and drive loyalty toward your organization.

"My goal is to get around to every member at an event to say hello and thank them personally," says President and CEO of the Fort Bend Chamber of Commerce Keri Schmidt. "I make sure I move around the room as much as possible to ensure everyone has been greeted." Schmidt firmly believes that having in-person conversations with members can provide leadership with the knowledge necessary to help them provide solutions to challenges faced by members. "Sometimes helping them is simply listening to their concerns," Schmidt says. "Members who are engaged in relationships with leadership are less likely to drop their memberships."

Organizations must create opportunities for these personal interactions to happen. Schmidt suggests engaging new members in the following ways:

1. **Host regular receptions or mixers.** "We have quarterly Chairman's Receptions to which our new members are invited," Schmidt says. "This allows them to get oriented with the chamber and ask any questions they may have about their membership." If you don't hold regular events, try hosting a new member mixer or a similar special event so newcomers can get acquainted with key staff members and start building relationships with one another.
2. **Keep an open door policy.** "We want our members to feel that the chamber is their building, and we are merely stewards," Schmidt says. "This results in members feeling very comfortable dropping in." If leadership is unavailable when new members come to visit, be sure to follow up with a phone call to schedule an in-person meeting at a later date.
3. **Offer one-on-one meetings with leadership.** "Recognize that this is more important than most anything you can do, so you must make time for it," Schmidt says. "My philosophy is people before paper." During these meetings share details regarding committees, luncheons or other networking opportunities in which new members can begin to get involved.

Source: Keri Curtis Schmidt, CCE, IOM, President and CEO, Fort Bend Chamber of Commerce, Sugar Land, TX. Phone (281) 491-0216. E-mail: Keri@fortbendcc.org. Website: www.fortbendcc.org

Celebrate Members in Internal and External Publications

Using internal publications to share member milestones such as a 25th wedding anniversary or 25 years as a valued member is a great way to highlight important events.

Why not take it a step further and publicize these occasions in other community publications as well?

Depending on your budget, you may choose to focus on free community papers when sharing news about members. But if your budget allows, consider taking out an ad in a local newspaper to congratulate members who reach certain milestones.

To keep the costs down, consider taking out an ad four times a year and mentioning all member milestones that have occurred during that time period. The added recognition will not only be meaningful to your current members but hopefully attract interest from prospective members as well.

One added bonus? These efforts will also keep your name fresh in the minds of other community members, including the media.

What Technology Do You Most Value?

***Q.** As you consider all of the technology that exists today (e.g., software, social media, mobile apps and more), what technology do you most value when it comes to your membership management responsibilities and why?*

"The Gator Nation® spans the world, and to the University of Florida Alumni Association, technology is essential to serving our members. We rely on the use of a donor database to manage our current memberships and identify prospective members, like most alumni associations. The database allows us to segment our acquisition campaigns as well as target our renewal programs based on previous appeals. Our website is the most utilized piece of technology in our arsenal. It's vital to our membership growth and, for many of our members, the way they first reconnect with the association.

"We also employ the use of social media, our mobile app, The Gator Nation App and a community-based Web platform to engage with our members on a daily basis. These tools allow us to connect with our members but also provide the opportunity for our members to interact with each other. Connecting The Gator Nation is at our core, and we are always looking for new technology that enhances the member experience."

— Erin M. Ohlsen, Associate Director, Membership and Philanthropy, University of Florida Development and Alumni Affairs, Gainesville, FL. Phone (352) 392-1616. E-mail: eohlsen@ufalumni.ufl.edu. Website: www.ufalumni.ufl.edu

"Different types of technology each play specific roles in growing and maintaining our membership base at San Diego Opera. Software and databases store information for us to cultivate new members and donors. Tessitura (Software) specifically works with ticketing, so we are informed on not only the membership levels of our donors but also when and what events they'll be attending. Using social media is also critical to our success, as it keeps our members engaged with our organization regularly. We see benefits when members share information within their own networks regarding upcoming events in which they are interested in or plan to attend. This promotes their relationship with us, as well as their own cultural interests. I love being able to track the events our members are attending and offer specialized experiences based on their interests. Ultimately, these tools help us personalize the membership experience, and various forms of technology assist us in improving the membership engagement process."

— Angela Venuti, Individual Giving Director, San Diego Opera, San Diego, CA. Phone (619) 232-7636. E-mail: angela.venuti@sdopera.org. Website: www.sdopera.org

Evaluate Your Use of Time to Better Manage It

Have you ever maintained a time log during the course of a month to evaluate how you spend your most precious commodity? A self-imposed time log can provide a surprisingly strong indicator of how projects are being prioritized and addressed.

Keep a simple time log with date, current activity, beginning and end times and comments. After each half hour, write down the activity just completed for that period.

At the end of each day, rate each activity on your time log on a scale of "1" to "5" ("1" representing least important, "5" being most important). At the end of each week, review results to determine how much time you devoted to highly important versus low-priority tasks. Then work to make adjustments to use time more productively.

Innovative Non-Dues Revenue Strategies

If you're struggling for ways to generate revenue, you're not alone. But if you think outside the box, unexpected opportunities can present themselves. Jamie Gates, senior vice president of the Conway Area Chamber of Commerce (Conway, AR), shares how his chamber came up with a new strategy for generating non-dues revenue.

When the Conway Area Chamber hit a ceiling with the revenue it could generate from events, Gates knew that they needed an alternative method for funding the chamber's activities, preferably one that provided value to members. So they started working with Axiom, one of the largest consumer intelligence companies, to provide their members with targeted leads.

"We've kind of become a list broker," says Gates. "We talk to a client and determine what a good set of leads looks like for them, and then we go into the lab and take advantage of our relationship with Axiom to pull lists of leads, data that our members can use to power their marketing efforts." The lists they pull vary in size according to client need, ranging from as small as 200 names at the neighborhood level up to nationwide e-mail campaigns.

Gates notes they are lucky that Axiom's headquarters is located in Conway. "We are fortunate to be kind of natives to industry, since they're so nearby."

He's also happy that in addition to generating revenue, providing leads is genuinely helpful to chamber members. "For us, it performs against budget but also against mission. We feel like we're bringing new tools to the table for our members. It increases our retention, makes us more relevant and helps answer the question, 'What does the chamber do for me?'"

Source: Jamie Gates, CCE, Senior Vice President, Conway Area Chamber of Commerce, Conway, AR. Phone (501) 932-5401. E-mail: jamie@conwayarkansas.org. Website: www.conwaychamber.com

TIME MANAGEMENT REVIEW

Date	Activity	Start	End	Comments	Rating
6/9	Admin	8	8:30	E-mail, Phone, Etc.	3
	Volunteer Mtg	8:30	9:30	Issues, Priorities	4
	Chapter Calls	9:30	10:15	Phone chapter officers	5

Utilize Existing Data To Recruit New Members

Take some of the guesswork out of membership recruitment by doing your homework on prospects. Utilize the data your organization already collects about its members to streamline your recruitment process and make it more effective.

Shari Pash, owner of Strategic Solutions for Growth, a Michigan-based consulting business, specializes in membership recruitment and retention consulting. Research is one of the steps of her membership recruitment process. She suggests these tips to research prospective members:

- **Know the lead sources that brought in new members.** "If you don't currently track this information, implement a tracking system immediately. Once you know what's working, target future members with similar strategies and programming," she says. Focus your efforts on lead sources with the highest impact.
- **Determine the DNA or make-up of your best members.** These members are a great resource. Target recruitment efforts to prospects whose interests align with them. "Recruit members that meet your DNA, and you will see a natural growth in retention," Pash says.
- **Learn about the needs of your prospects.** Build a rapport with prospects and ask specific questions about their needs. What are they looking to get out of a membership? "This will make selling a membership more relevant and increase your ability to retain that member in the future."
- **Keep an active list of prospects.** Keep a list of 30, 50 or 100 prospects that meet the DNA you're looking for in members. Keep the list updated and relevant so those prospects are ready to be recruited.
- **Be consistent.** Pash stresses that above all, consistency is the key to successful membership recruitment. She suggests creating a process that can be customized for each prospect with steps that can be checked off along the way.

Source: Shari Pash, Owner, Strategic Solutions for Growth, Lansing, MI. Phone (517) 285-7127. E-mail: shari@strategicsolutionsforgrowth.com. Website: www.strategicsolutionsforgrowth.com

Build a Multichapter Website

For organizations with multiple chapters, figuring out how to unify a Web presence can be an exercise in frustration. Lamees Abourahma, president of the Web development firm Webbright, and May Adams, co-founder of the Exit Planning Exchange (XPX), solved this problem by creating a single, multichapter website for the growing XPX organization.

The Exit Planning Exchange is a 10-year-old organization that had five to six chapters with their own separate websites before the new website was built. Says Adams, "We kept everything separate at first and realized it was pretty inefficient, so it was in our interest to combine the chapter websites. We also had something called The Owners Academy where members could share content, and having that in multiple separate sites was horrible from an SEO perspective and a pain in the neck from a management perspective."

Once the XPX team decided that they wanted to centralize their online presence, they had to decide whom to work with and what they wanted the final product to look like. Adams says to prevent any hard feelings down the road, "We created a committee with a representative from every chapter. The committee met once a month for about a year, but it was worth taking the extra time and having extra steps so that when the website launched everyone had had a say in it."

When it was time to choose a provider, Adams and the rest of the committee selected Webbright, a Web development company that works on the Wild Apricot platform. Abourahma, Adams and the rest of the committee worked together to decide what they wanted the site to look like and how they wanted it to work. "Once they decided how it would work, and once they had a plan, it wasn't difficult to implement the decisions the way they decided to build it," says Abourahma. The final product was one main site, with sections for general information and a dropdown for each chapter.

Abourahma notes that by using some of the Wild Apricot website gadgets, the XPX team was able to automate a lot of the site updates, cutting down on the site administrator's work. "For example, Upcoming Events is a gadget in Wild Apricot, so you can see upcoming events in all the chapters in one place, and adding an event to a chapter automatically adds it to the centralized event tool."

Both Abourahma and Adams are enthusiastic about the benefits of creating a centralized site for XPX's multiple chapters. Abourahma says, "By doing this, they are also centralizing all their membership — in other cases, each chapter has their own system and their own database, which means you lose that consistency. By having a centralized database, everything is in one place. Personally I think that's a great thing."

Adams believes organizations who don't have a centralized site "are really holding themselves back by keeping everybody in silos. We have 90 percent of the best of both worlds — every chapter can do what they want but get the benefit of the shared content and brand and identity."

Sources: Lamees Abourahma, Founder and President, Webbright Services, LLC, Midlothian, VA. Phone (804) 897-1310. E-mail: lamees@webbrightservices.com. Website: www.webbrightservices.com

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Highlight Member Committees to Increase Interest

To inspire more members to join committees, regularly acknowledge committees for a job well done. Current committee members will appreciate the recognition and other members may become inspired to join committees.

Include a section in your member newsletter dedicated to recognizing committees. Include committee members' names when publicizing events and programs. Ask committee members to write testimonials about their experiences on their respective committees to be included in member solicitation materials.