

WEF/MA Leader Workshop

Keys to Grow, Retain & Engage Members

Attendees: MA Staff, MA Contacts & MA Membership Chairs

Tuesday, January 23rd, 2:00-4:00 PM (EST)

Participants: 57

Aaron Berry, WEF Membership Chair, Opening Remarks. “I began working with WI & IL WEAs. This has been a great opportunity to assist MAs and WEF. I am working on guiding the org. and committee to say, what’s our path and how are we going forward? Must look at membership from an MA point of view as well as a WEF point of view. Membership is the livelihood of WEF. Are we adding depth to WEF? We need to create a dynamic conversation between stakeholders. Recruitment is important to WEF and MA’s. It is a tough task. How do we get/target new members and retain them? What are the processes others are doing? It is easier to retain members than it is to gain new members. So how can we gain new members at a reasonable pace? We have some targets; one is looking at the membership benefits and structure. What does each membership group receive and what are they using? The members may not fully understand the depth of their membership/benefit. I am a big proponent on touching base with the MA’s often. We need to ask, “how can we leverage each other?” Where are the MA’s going and how are they meeting their goals and completing their tasks? Let us all move together in the right direction. We are also looking at ways to get YPs/Academics involved.

Alison Heron: Leading in with Stats and Trends

- Challenges Facing Associations – Economic (impact of COVID-19), limited resources (trying to do more with less) and what is the value proposition? (what is the value your association delivers, why should members stay, attend an event? This question addresses the “Why”.)
- WEF is working hard to gain new members via digital outreach too.
- WEF’s average retention rate (for the year) is at 84.4%.
- Top Five Challenges – Communication Value, Engagement (Getting new volunteers to participate), Growth, Retention & Competing organizations.
- Members are the lifeblood of any association. Changing demographics will influence membership and the value proposition. This will affect the next generation of members (YP’s and student members.). Partner with industry, reach out to professors, etc.
- Great opportunity ahead – by working together there are things the MAs & WEF can do. WEF performs recruitment and membership functions for MA’s in support of MA’s.
- Call to action for MA’s – Share information about WEF programs, events, and advocacy. Participate in the WEFTEC recruitment initiative. Ensure information and links are kept current on your website. Make a positive digital impression. Connect, learn, and share through WEF idea swaps & webinars.
- Questions, Contact Alison Heron at aheron@wef.org

Camille Sanders: (Panel Discussion):

- Camille introduced Ms. Mary Cheddie (SHRM) & Ms. Carmen McCormick (AWHONN).

Camille: How is your organization pivoting to meet member needs/chapter needs and maintain service delivery during this time?

Mary: Once COVID hit, SHRM provided a global webinar featuring the director of the CDC. The number 1 money maker for our chapters is their annual conferences. Due to restrictions some of those conferences were not able to be held. Some had to cancel, and affiliates were financially strapped while those who committed to a virtual event provided a steep learning curve. We have been conducting webinars/video events. Some of our chapters do weekly meetings for 20 mins and they talk/network, etc. We have found that to maintain engagement on calls/webinars you need to have visual movement every 5-8 seconds.

Carmen: Like SHRM, the main source of revenue for our chapters is events. So when the pandemic hit, our chapters lost revenue due to cancellations, but soon some chapter staff turned things around, and we were able to get 3 sections who did hybrid or virtual events. They had more than 55 people who participated in each event (good for the nursing professions due to their schedules) for over 2.5 hours. We discovered that connections and learning from each other was valuable. We purchased a ZOOM account with webinar functionality and created user guides and distributed it. We released 9 webinars which included contact hours and chapters were able to charge a fee for members and non-members. Challenge? Tech posed an initial hesitation to use the platform.

Camille: Are your chapters/affiliates are experiencing an impact (re: reduction in member recruitment and retention rates)?

- If they are experiencing challenges, how are the national organization and your chapters/affiliates are working together to address membership recruitment and retention challenges (related to the pandemic)?
- If they are not experiencing challenges, what are some of the strategies and/or tactics that have helped insulate your chapters/affiliates from attrition?

Mary: SHRM has not lost members – in fact, we have gained members during this time because companies have begun to see HR as essential since they need guidance on operating safely during the pandemic, reopening, and other HR/legal issues related to COVID. Our chapter membership varies. Some have lost members and others have gained. The variance factors is geographic. Most chapter membership loss is in areas where business closure is high and where unemployment is high. DE&I elevated a need for elevations of diversity offices nationwide. There was a need for HR to deliver. We tried to provide more guidance, a Blue-Ribbon Commission, tool kits to drive out in-office racism, etc. We provide webinars throughout COVID which are recorded, and on-demand and viewing does not require membership. Some chapters opened for new members with no dues (e.g., LA). We are interested to see if we can convert their free membership to a long-term paying member. One lesson that we've learned throughout this crisis and in serving our members and chapter during this time is that we need to have empathy for each other. For now, this is our new normalcy.

Carmen: AWHONN is also doing okay with membership. We haven't grown like SHRM, but our numbers are pretty stable, which is something we didn't expect. We have established a membership hardship policy. It would allow a person to have access to our journals and webinars at no cost with an extension of six months. We have only had 20 people ask about this. We set up a leadership development conference to have the chapter leaders could learn how to sell membership/value of membership. We had 219 members attend when normally only about 100 participate.

Camille: WEF launched a temporary e-membership last Spring and developed a Hardship Dues policy for members, and expanded access to resources and webinars. We are on the same page with some of the strategies your associations are implementing.

Camille: Based on your experiences, what additional advice would you give to volunteer leaders who are unsure about how to communicate the value of membership right now?

Mary: Annual Cost for SHRM is \$219/year and beginning 2020 we stopped offering any discounts for membership. The value of SHRM membership is \$1,300. So that is a great ROI.

We ask, “What’s in it for you? SHRM provides workplace solutions. **We talk about the value of workplace solutions and not so much on the value of membership.** When the membership team calls lapsed members to renew, conversion rate is 40% from 10-12% if a third-party makes the calls. Engagement should be one-on-one. All chapter members are not required to be national members. Some chapter members are not SHRM national members, but we have ways to bring to SHRM national members where they stay as a national member for the long-term.

Carmen: We send out a monthly list of lapsed members to chapters for them to reach out to members. The chapters want to hear solutions and feedback from each other and not so much from the national office. We have real members/chapters share their stories.

Lisa Ruane takes questions in the chat:

QUESTION

Dianne Sumego: Do you have the same parallel track and how have you been able to balance your value vs the chapter value:

RESPONSE

Carmen: We offer a lot of content that our chapters use to help develop their programs – so it’s a real partnership. We don’t really view them as our competition. AWHONN also partners with an organization called ACOG (American College of Gynecologists) and offer a discounted joint membership for the doctors and nurses who are interested in receiving content from both organizations, which is something our chapters don’t provide directly.

Mary: Our primary competition is from our chapters which are not 100% SHRM members (dual-membership chapters).

QUESTION

Pam Burnett: What makes the *Sip & Share* events work so well?

RESPONSE

Mary: They work so well because they are limited to small groups of 20 or less, so there’s high engagement.

BREAK from 2:50-3:00 PM

Onboarding (Camille Sanders)

The member lifecycle is about the member journey split by member acquisition and membership retention.

What is onboarding? Onboarding is the process associations go through to welcome and integrate individuals into an organization. Let them know how they can get involved, help them understand benefits that are available to them, and reminding them (throughout the year) what those benefits are. Onboarding is the first step in the retention process and leads to successful renewals. We know that members who have a non-dues transaction with your organization are more likely to renew. A non-dues transaction could be completely a survey, participating in a webinar; etc. There's some increased level of engagement. Also, market studies have proven that having an engagement series of month-by-month contact/touchpoints with your members are proven to increase retention rates substantially (or organizations who do not onboard members).

- Touch Points: WEF has six onboarding touch points – Send a new member a welcome email, we mail a welcome kit, initiate a New Member Call, ask them to participate in a New Member Survey, send the new member an Invitation to Volunteer (ask members to get involved, reach out to local member associations, etc.), Email Engagement Series (to highlight the benefits throughout the year).
- How can MA's help (4 points): A welcome email (use information from monthly data dumps to find and contact new members), Welcome call (encourage you to use your volunteers to help make those calls if your organization has a small staff or no staff), invitation to volunteer (ask members to get involved and let them know you need them), initiate an email engagement series (Highlight local events throughout the year)
- Visit WEF's MA Resource Center to view and download templates that are available for MA use – they are found in the WEF Member Association space (under "Membership") at www.wef.org.
- We are always available to help MAs who have questions about the onboarding process, or what you can do. If you have questions, contact Camille Sanders at csanders@wef.org.

Break out Room Questions:

How would you describe the value of WEF & MA Membership? We (WEF) provide you with XXX and then address How does that XXX relate to onboarding?

REPORT OUTS

Room 2

Networking and Continuing Education is valuable. Networking is tough to do in COVID-19 and we have reimagined our events. Even our annual conference was virtual and was more successful than expected. Aaron Berry added that continuing education is important and being a part of something for the greater good is valuable.

Room 3

Benefits of WEF/MA Membership

- Service (connecting members to the best education & training for their interests as well as offering technical help for a new world of virtual events)
- Free or discounted webinars & member discounts on training

- Committees & networking
- P3s (public-private partnership) – bringing like-minded individuals together as well as connecting them to individuals with different viewpoints for collaboration
- CECs/PDHs

Onboarding:

- board members or volunteers reach out to new members to learn their interests and get them connected with an applicable committee

Room 5

Benefits of WEF/MA Membership

- WEF benefits: provide resources, provide training, develops a network of people, gives professional recognition
- Reaching out to new members: always show value, communicate personally and often

Lisa Ruane Monitored the chat

- Kathy Rabalais: We have a challenge getting our members of our membership committee to do commit to onboarding practices. Our membership committee is hesitant to do this. Camille replied, you make a good point. They need to help with that load. If they are not rising to the challenge, then put a call out for volunteers with the general membership who may be willing to assist. Remember, some people are waiting to be asked to volunteer.
- Traci Storm: resources provided, training, developing networks, professional recognition.
- Aaron Berry: networking, continuing education, common goal of bettering the environment/world.
- Kathryn Yusko: Education & Training (also being available to troubleshoot issues with virtual platforms). Collaboration between Public, Private & Utilities
- Alondra Hernandez: national and professional resources/contacts
- Janet Cann: We have had to shift our focus from offering person to person networking, to we can offer you opportunities to develop your career by offering education & training (virtually) to help keep your professional accreditation.
- Catrice Jones: Support during MA leadership transition, sharing of resources amongst MAs, provide broader national perspective for members that traditionally may only have local interactions.
- Alondra Hernandez: I do not know why but when I get a happy birthday email from an organization, I am SO happy!

End Comments from Chat (above)

Aaron Berry: just having a general welcome email, short and sweet. Here are the different committees you may wish to join, etc. Send off to member and copy various relevant committee chairs.

Lisa Ruane: What caught your eye regarding joining an organization?

Alondra Hernandez: I was aligned with a mentor when I first joined an organization. It was less intimidating.

Christian Davies-Venn: The connection must be at a personal level which causes people to respond better. We struggle with the follow up. It is not effective or consistent in some cases. Follow up, if it is good, will help to retain those new members during renewal. Additionally, when we have social events, we use those events as a starting point to get new members interested. Ask the new members what some of their interests may be outside of their professional activities.

Sabrina Rivera: With our group in Nevada, we send an email and when they meet us, the retention rate increases. Personal meeting a new member is important.

Lisa Ruane: “What is holding you back/challenges?”

Aaron Berry: “We get involved with an org/group is to get to a common goal. Ours just happens to be water. You can use someone’s name if they are a new/first call member. Find/make that personal connection and use their name.

Lisa closed the conversation at 3:55 PM

Aaron Berry closing remarks: Thank you. We have a dynamic group. Continue to communicate to each other. Contact other WEF MA’s or WEF staff.

Dianne Crilley Closing Remarks: We wish we were in-person, but we hope to see you at an upcoming event. The Leadership series continues 23 March, titled, *Accountability without Authority*.