SHERI JACOBS, FASAE, CAE
Executive Editor

membership
ESSENTIALS

SECOND EDITION

RECRUITMENT,
RETENTION,
ROLES,
RESPONSIBILITIES,
& RESOURCES

Membership Essentials

Recruitment, Retention, Roles, Responsibilities, and Resources

Second Edition

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—Sheri Jacobs, FASAE, CAE

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Introduction

By Greg Fine, CAE

Membership, or the act of affiliation, remains a core pillar of many, if not most, associations today. How an individual or entity engages in this act of affiliation can differ widely, and even the lexicon of membership (member, customer, stakeholder, etc.) can vary based on the mission and focus of the organization. Yet, one common characteristic is frequently present . . . a desire on the part of an individual to belong. This should come as no surprise. Humans are, by our very nature, highly social beings and thrive in being part of pack or group. This instinctive desire to form groups has been well leveraged by associations throughout history. In fact, many associations' first mission were simply to provide "membership" to like individuals. Often around a profession. Think guild. Over time, association professionals realized the power of the group could do much more than just affiliate, and this gave rise to common association programs of today like professional development, certification, and advocacy. Yet, all of these still relied on the traditional concept of membership. It was members who created the content that the association then monetized by selling back to members and nonmembers alike. A great model that served both associations and society well. But things are changing!

In today's world of informal connections (Facebook and LinkedIn), information overload (email and SPAM), instant communication (text messaging), and an overwhelming flood of news, data, and noise from all sources, associations are increasingly challenged to cut through the clutter to provide value in all areas, including membership. Gone are the days when simple affiliation was enough to sustain a membership base alone. Like all industries, associations are grappling with changing customer demographics, rapidly shifting market conditions, globalization, disruptive technologies, competitive pressure from new sectors, and a distracted and overwhelmed customer base. All of this is enough to make even the most positive association professionals consider throwing in the towel as they declare: "Membership is dead."

Not so fast there. While the word "membership" may have a different meaning today than in the past, the idea and value of affiliation remains a powerful concept that associations are uniquely positioned to leverage. For-profit organizations have long sought to create a level of loyalty and affiliation with their customers that associations historically begin with. Rachel Botsman, an expert on "The Collaborative Economy" has identified characteristics in the sharing economy that are quite similar to those of membership. Her thinking around the ability to harness a missing market

opportunity through disruption and innovation should strike fear and inspire hope in us all. So membership is not dead; it is, like everything else, evolving.

Membership Essentials provides insight and foresight from some of the best and brightest minds in the profession today. Membership is a full-contact sport, and these individuals share their knowledge and experience on what is needed today to ensure a future tomorrow.

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The Evolving Environment for Membership and Engagement

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By Kenneth A. Doyle, FASAE, CAE, and

Scott D. Oser, MBA

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A search of Google for the term "MEMBER" provides 3,280,000,000 results in 0.35 seconds and a search for "MEMBERSHIP" provides 525,000,000 results in 0.47 seconds. Access to information and the meaning of the terms MEMBER and MEMBERSHIP have both changed dramatically over the last 30 years.

There was a time when being a MEMBER meant voluntarily joining a group with like interests for mutual benefit in a trusted environment. The terms MEMBER and MEMBERSHIP have been co-opted by those who often just want to sell something

and use the inherent good will of the terms to break down barriers to making a sale and create a feeling of inclusion.

Previously, an association could count on new entrants to their profession or line of business to join and remain members throughout their careers. Prospective employers would not ask candidates why they were members of their association, but they would ask why you were NOT a member. You just "had" to be a member to practice your profession or craft. Not anymore.

For many associations, the reason they exist is to serve the needs of their members—a very simple statement. But you have to define who or what the "member" is before you can define needs and create benefits that would cause "membership" to be of value.

Less than two decades ago, associations easily attracted some members who were happy to pay dues for the information provided and other services generated—often called "checkbook members." Although this type of member still exists today, it is much less prevalent. The compelling reasons to pay dues to an organization just do not exist to the same extent. While much of the needed information and many services are available at low or no cost over the Internet or through other providers, there are many things around membership that haven't changed. Individuals and corporate entities still need to stay up-to-date, stay informed, connect with peers and colleagues—build a professional network, and obtain education (in some cases it's required) so there is an ongoing basic value in the association membership model.

This chapter is going to tee up the rest of the book by giving the reader some insight into the major things that have changed in the membership area over recent years.

Global Expansion, Yet North American–Centric

No longer is the typical American-based association focused on a member from the United States who is middle class, speaks English, and comes from a Judeo/Christian background. Associations are embracing members from all faiths, economic backgrounds, and from every corner of the globe. With the advent of technology, membership has become universally available and accepted, yet to a large extent, associations based in the United States still tend to be North American–centric, in spite of the outreach to the global community.

Economic Uncertainties with an Abundance of Options

The economy has always been uncertain. Inflation has been relatively tame over the last two decades, but is always a lurking threat. The United States is moving further away from an industrial economy toward a service society. But technology has allowed many middle class jobs to be outsourced to other countries where labor rates are much lower. Large corporations are now competing with national governments that are heavily promoting their own resources, products, and workforce.

The American people will drive across town to save 5 cents a gallon. Internet shopping has commoditized almost anything we buy. It has become a national game to acquire

our products at the absolute lowest price, regardless of what impact this might have on the local economy or the domestic workforce.

Work Redefined

The nine-to-five job no longer exists for many workers. Work takes place in a 24/7 world. Technology has allowed us to work anywhere and at any time. We are shifting from the central office to the home office. People don't believe they will retire from the place where they started their careers. With longer life expectancy, many are opting for two or more careers rather than one and think nothing of giving up their first career and starting an entirely different one as they progress through life. Work could consist of many short-term projects. Everyone will be responsible for his own success. The employer may feel less and less responsible to pay the expenses associated with membership and participation in an association. As more people adapt alternative work styles, they will want their associations to support their new work environment and changed needs.

All this leads to greater levels of uncertainty. We will have fewer resources and less control over our future. We no longer will live to work or work to live but will balance work and life experiences. The pull between work time and personal time will be even greater in the future. Time is the only thing we have that is strictly limited.

A Workforce of Five Generations

This subject has been covered to exhaustion in recent years, but you have to address generational differences if you are going to talk about the evolution of membership. In the ASAE Foundation's 1985 publication *Future Perspectives*, Rod Geer begins his chapter with: "It's hard to read the handwriting on the wall when your back is against it, and that is exactly the predicament many association executives will be facing if they fail to prepare now for the new breed of volunteer likely to be populating our leadership mix in the future." It was as true then as it is now, but his chapter was called *Baby Boomers in Your Boardroom*.

There are five distinct generations in the workforce today. Each has its own set of values, its own drivers, and its own way of looking at the world. Despite our differences, we must all get along and work together to get ahead. The changing of the guard will occur, as it always has, and associations must adapt to the varying needs of their members and employees.

The Generations—Definitions

Traditionalists—born before 1945, also known as the quiet generation or the greatest generation. There are almost 39 million Traditionalists in the United States. They are not leaving the workforce as their parents did. They will stay active well into their 70's and will want to continue to be a member—if there is value

for them. Traditionalists will want to see the world, spend time with their grand-children, and be involved in something meaningful. Organizational value to Tra-ditionalists may be received by volunteering their time (but not too much of it) and talents locally and/or staying involved with their peers with whom they have shared their careers. To keep the Traditionalists involved, associations will have to offer them a place to contribute, meet friends and feel welcome. Associations that offer rewarding experiences and comradery will continue to see participation by Traditionalists.

Baby Boomers—born between 1946 and 1964. There are almost 80 million U.S. Baby Boomers. They shaped the world we live in today, and they know it. Some Boomers are running toward retirement. They are done with work and want to dedi-cate the last third of their lives to experiences. They grew up believing that hard work and saving were the only way to prepare for another Great Depression. Now they have security and just want to enjoy their lives. Those associations that provide experiences and opportunities to give back may have a chance of keeping this type of Boomer involved.

Another portion of the Boomers don't want to stop working. Work is part of who they are; heck, for many, it IS who they are. They just want to work less so they can enjoy life a little more. They have money and will spend it on retirement homes, healthcare, and on experiences. Many will work as something to do and for the extra income to pay for special events and travel.

You will have to pry many Boomers out of their positions. They will not want to let go. They have no urge to move out of the way and let the younger genera-tion have their turn. Associations that provide a place to belong or an economic benefit will find it easier to keep Boomers involved, so long as the cost is not perceived as too high and the Boomer feels personally connected with others in the organization.

Generation X—born between 1965 and 1980. There are over 60 million U.S. Gen Xers. Initially viewed as whiny slackers by the hard-working Boomers, Gen Xers think of themselves as wide-eyed realists. They were never promised a rose garden and they are living life, not to conform to Boomers expectations, but to their own. They learned that hard work was not the path to riches; it is just hard work—time spent not doing what they really wanted to do. They understood that nothing will come easy to them.

This is the most misunderstood generation by everyone, including themselves. They are squished between the Boomers who will not get out of the way and the Millen-nials, who want the top jobs NOW! Misunderstood or not, Gen Xers will become the leaders of organizations as the Baby Boomers start to retire.

Associations will have to engage the Gen Xers in new ways. Not quite digital natives, Gen Xers are generally tech-savvy, but not all are as savvy as others. They have a dif-ficult time trusting others, and they are obsessively self-reliant. They don't see them-selves as "joiners" of traditional associations or organizations, nor do they attend meetings as other generations did/do.

To attract Gen Xers' attention, associations will have to have a compelling offer, one that includes economic benefit, personal enrichment, and (at least the perception of) potential new opportunities. To earn Gen Xers' time and dollars, associations will

have to focus on delivering value every day and will not be able to rely on a reputation of overall value developed over time.

Millennials—born between 1981 and 2001. There are almost 84 million U.S. Millennials, a larger cohort than Boomers. They grew up with nothing but prosperity in their future and believed that everything would come to them. As teens, they walked through the mall and every store they went into an employee asked, not if she could help them, but if they wanted a job. Then the great recession hit and they became bewildered. As twenty-somethings, they graduated with bachelor's degrees and ended up working in the mall at the job they turned down as a teen. No wonder they have been confused. Money matters to Millennials, but in a different way. Boomers stored money like nuts for the winter, Millennials have a confidence that everything will work out and money is best spent or stored in something they can use to experience life.

Besides making money, Millennials want to make a difference. They want to give of their time and enthusiasm, but will not tolerate being ignored. If not cultivated, Millennials will pack up and text someone to go do something else. Their chapter is not yet written; however, associations will have to address Millennials as members and workers. This generation grew up with computers and is responsive mostly to screen-oriented promotions.

New Generation—born after 2001 and totally in the Internet era. At the time of this writing, there are more than 45 million of them in the United States, and the number is continually increasing. This group contains the real digital natives. Screens, screens everywhere, they grew up with access to an unlimited amount of data and information. Their options are limitless, but their time is not, so they have adapted to quickly sifting through content for what is relevant to them. They have what has been termed as an 8-second filter, which older generations see as an attention span problem. They seek acceptance through social media, where they may have different personas depending on the audience they are playing to. For an association, these future members and employees strive to avoid the bad rap the Millennials got and want to work hard and prove themselves. They are really very pragmatic and plan to be very adaptable given the uncertainties they have had growing up after 9/11 and the great recession. It may be too early to knowingly plan for how this generation will impact the world. But it will be up to them to fix the problem the earlier generations have created.

A Sense of Community

Despite all of the changes that have taken place in the world, and in the association space in particular, one of the things that has not changed is the members' desire to be part of a community. Community has always been a driver of association membership, and that need continues to be especially strong today. The biggest change in community that impacts associations is that it no longer needs to be face to face and in-person. That sense of belonging that all humans desire can now be fulfilled in different ways. You can be "friends" on Facebook with people all over the world you never talk to or see, but you can still "feel" connected to them. Thus, community can

be created online as well as in person, and that creates both challenges and opportunities for associations.

Opportunities

Since association members no longer "need" to be face to face to be part of a community, associations can become more productive from both a staff and financial perspective. With the ability to get together virtually and form community without the need to be together at one physical location, associations won't incur the cost of the marketing, implementation, and staff resources necessary to hold an in-person event. In addition to a reduction in travel expenses, the association staff will also be able to focus on other areas of responsibility, since they will not be out of pocket as often as they had been in the past.

Challenges

The ability to create, manage, and maintain a virtual community is going to be critical for associations moving forward. Since many members are now expecting virtual community, the association needs to be in tune with their wants, needs, and preferences so that they can serve this expectation accordingly. If associations do not provide the right type of virtual community, it will have a negative impact on member retention, which is something that all associations want to avoid. (See Chapter 14 for more information on private online communities.) The good news is that there are a number of different technologies that association staff can utilize to fill this member need.

Advances in Technology

If anything has had an immense impact on the way associations do business and what members expect, it is technology. There have been incredible technological advances, which has impacted almost all areas of associations.

Amazing how things have changed since the 1988 edition of ASAE's *Principles of Association Management* when the question of what to automate, and when, was answered by the statement: "Once you know the basic rules of buying a computer, you must be sure you need one in the first place." (Chapter 8 provides a good overview of association database management systems.)

Technologically Savvy

Just how technologically savvy the member is will determine how information can be delivered. These variations in technological savviness will lead an association to utilize multiple delivery systems to reach members and potential members. Marketers will have to use a form of digital target marketing and have been called "marketing technologists." As of now, this means that the marketers have be very tech-savvy themselves, but in the future, as the software evolves, marketers will revert to marketing and allow the technology to personalize the delivery to the member.

Associations will have to segment members by how tech-savvy they are and then tailor the offering to the level of the target audience. Some members will want it simple and straightforward; others will regard that as rudimentary and not worth their time. One size will not fit all.

Technologically Savvy Users—Definitions

Minimal Tech User—This group can turn on the TV and change channels but cannot use the DVR. They can make calls on their mobile phones and sometimes answer a text, but the rest of what the phone can do is lost on them. They have learned how to Google, shop online, and use Facebook. One-click shopping is the best for them.

Basic Tech User—This group has slightly more advanced digital skills. They can use the DVR and most any app on the phone/tablet. If the computer stops functioning, they can reboot, but if that does not fix the problem they buy a new computer. Basic Tech Users have an extensive list of websites that they frequent and use. When motivated, they will really dig deep using Google, but are easily discouraged and will quit fairly quickly. Several options on the same web page works, as long as everything is very easy to find.

Any Tech User—The next level of digital savviness consists of people who can set up their own home networks and enjoy the challenge of making all the technology work. When the computer quits, they can reinstall the original software and bring it back to life. Members of this group are the ones whom the Minimal and Basic Tech Users call for home tech support and to figure out how to set up and turn the Apple TV on. They will figure out how to get what they need from the web and will call the help desk for assistance, if needed, to figure out how to get to the right place. They will find what they need on the web, even if it takes many searches. They enjoy multiple options on the same web page to ease their decision making.

High Tech User—This level sets up the office network, can do some coding if needed, and jail break their phones. They know how to run the server and make changes. When they go to your website, they know whether your software is running slowly or whether it's their Internet connection. They, too, enjoy multiple options on their web pages, but technical specifications become more important to them.

Technophile—This is the top level of sophistication. When they go to your website, they know how to change it without your permission. The Technophile looks like the people in the movies who write code against a stopwatch while taking shots of tequila. This group writes the apps you use, and they think any website found on Google is too basic.

Member Expectations

Members have always expected a lot for their dues, but with today's technology those expectations have shot through the roof. Members now expect you to communicate with them how they want, when they want, where they want, and about what they want. They also want the communications to be personalized. "Dear Member" is now a slap in the face to many members, as it doesn't show them that the association cares about them as individuals.

The Gamer

Millions of people are avid online game players. One of the very popular games is Halo, a military science fiction first-person-shooter video game.

When logged onto Halo online, players have performance ratings based on past play. They enter the matchmaking area, where an algorithm takes this rating and offers players a chance to join teams of other similarly rated players who are online at that moment. They form a team and challenge another group to play. Headsets allow for audio interaction in real time among teammates. They set up a plan and go into action.

Generally, these teams play matches until one team wins or time runs out. The whole experience lasts about 30 minutes. Contestants do not know who they are playing with, and players can be from all over the globe. As people become better players, they move up the ranks to more challenging play.

These "gamers" expect to be able to join a group, have a clear objective that is pursued aggressively, quickly rise in the ranks, and then move on to the next level, all in one session.

The traditional association committee structure is similar to playing Halo. One starts out joining the committee and then engages in active committee work. If that work is good enough to be noticed, the next step is moving up the chairs to committee leadership. However, this structure takes two to five years to go through this one cycle.

How can this traditional association process, which takes so long, ever satisfy someone who is used to the entire process happening in 30 minutes?

Opportunities and Challenges

With the explosion of devices that can be used for communication, associations now need to address their members through multiple mediums and using multiple mechanisms. Members are now using laptops, tablets, smartphones, desktops, hybrid computers, and more to access information and communication. Members are reading emails and direct mail, print and digital publications, are active on Facebook, LinkedIn, Twitter, Instagram, YouTube, and respond to text messages. There is probably no one device or method of communication that will satisfy the need of every member in an association. It is therefore going to be critical going forward that associations understand what their members', prospective members', and customers' preferences are when it comes to the device they are using, as well as in what format they want to be communicated.

A big question that associations are going to have to answer is which channels they will need to use and incorporate into their communications strategy. And do they have the infrastructure to support it? Since everyone wants to serve all constituents equally, some difficult decisions are going to have to be made because most associations simply won't have the financial or human resources to support every type of device and medium that is out there.