

Capital Development Strategies LLC

SAMPLE DOCUMENT

Based on an actual client presentation



ABCD MEMBER SURVEY 2014

Overview and Recommendations

ABCD MEMBER SURVEY — AUG-SEP 2014

OBJECTIVE – Provide ABCD strategic guidance regarding member priorities and perspectives

Invitation to participate sent to entire ABCDNET listserv – 20,800, reminders sent on a regular basis

3,478 individuals responded to survey

- 2,388 Active
- 885 Former
- 168 Nonmembers
- 36 Associate

SELECTED DATA



Breakdown of Active Member Respondents

- Unit – Executive 53%
- Unit – Specialist 26%
- USA 16%
- Extra 1%
- Service 0.5%

Age Range of Active Member Respondents

- | | | |
|---------|-----|-------|
| ▪ 22-30 | 101 | 5.1% |
| ▪ 31-40 | 651 | 32.9% |
| ▪ 41-50 | 624 | 31.5% |
| ▪ 51-60 | 497 | 25.1% |
| ▪ 61-70 | 94 | 4.7% |
| ▪ 70+ | 12 | 0.6% |

Years in Profession Among Active Member Respondents

- | | | |
|----------------|-----|-------|
| ▪ Less than 5 | 427 | 21.2% |
| ▪ 5 to 10 | 631 | 31.4% |
| ▪ 10 to 20 | 636 | 31.6% |
| ▪ 20+ | 315 | 15.7% |
| ▪ Not in Field | 1 | 0.0% |

SELECTED DATA



Among Active Members, 34% agreed with and 11% strongly agreed with the following statement:

- *“My experience with ABCD is primarily through a Professional group/department, but I wish I had a better understanding of the larger picture of what ABCD is accomplishing”*

53% of Active Members are not aware of ABCD’s Strategic Plan.

90% of Active Members have read the Professional Journal. 55% of Active Members read the ABCD News section in the Journal. 52% read the ABCDNET emails and 45% have voted in an ABCD election.

SELECTED DATA



Among Former Members, only 23% agreed with and 4% strongly agreed with the following statement:

- *“My experience with ABCD was primarily through a Professional Field group/department, but I wish I had a better understanding of the larger picture of what ABCD was accomplishing.”*

48% of Retired Members are not aware of ABCD’s Strategic Plan.

93% of Retired Members read the Journal, and 76% read the ABCD newsletter (formerly known as the Senior Newsletter.) 73% have used the Retiree Directory, and 73% have read the ABCD news section in the Journal. 65% of Former Members have voted in an ABCD election. And only 43% read the ABCDNET emails.

SELECTED DATA



Regarding Unit Department Members:

For all general questions – i.e. all of the questions targeted at everyone and not just at Unit Department employees – the 1,688 individuals (who indicated that they were Active Members from the Unit Dept.) responded in a similar way to all other respondents.

- This was true for questions related to perception of ABCD's priorities, their engagement, use of benefits and services, etc.

From the standpoint of general ABCD-related issues, Unit Department members' opinions are like all other ABCD members.

FRAMING THE CONVERSATION



Inform the Association's overall strategic planning process and direction by addressing two fundamental questions:

1. If an active/engaged membership is important and valuable to ABCD, why is that so?
2. What would be the affect on ABCD if it had a substantial increase in membership? Why is member retention and acquisition critical to ABCD's future?

These are critical “WHY” questions that must be addressed. They are different than questions which explore the “how” and the “what” of member engagement. The answers will guide strategic thinking.

RECOMMENDATIONS

Based on Review of Responses

SITUATION



Survey respondents primarily concerned with tangible, personal, short-term issues and ideas, such things as pay, working conditions, job titles, discounts, etc. But an opportunity exists to change that.

ABCD, the Association, can engage members in ways that are not limited to a single department or group. Its role is more comprehensive and more long-term, with a deeper impact.

Most members do not fully understand this.

ABCD's special, broad-based role should be clearly communicated, and these messages will be well received by the membership.

RECOMMENDATION



Take steps to focus organizational attention, resources and strategic emphasis in ways that reinforce and enhance the Association “brand.”

1. Use all channels to deliver message
2. Build a base of examples that demonstrate Association’s impact
3. Identify specific issues, tactics and strategies best suited for the Association
4. Reinforce how services delivered, impact made, etc. transcends individual departments and groups

SITUATION



Members of any professional association appreciate frank and frequent communication regarding important issues.

Survey responses showed that ABCD members are extremely concerned about two particular issues, especially XYZ and Employee Benefits.

Clearly communicating that the Association is taking steps to confront and address these issues will have a valuable impact on member attitudes.

RECOMMENDATION



Deploy immediately a well thought-out strategy to communicate that the Association is doing all that it can to address XYZ and Employee Benefits.

1. Use all available communication channels; share in great detail what is being done.
2. Assume that it will require multiple messages delivered through multiple platforms before such efforts will have their full effect.
3. Keep members informed, acknowledge both successes as well as setbacks; engage them in the process by providing them with information.

SITUATION



Several thousand members took the time to respond to the survey, and they clearly communicated a range of ideas regarding how ABCD deploys its organizational resources.

ABCD needs to be seen as appropriately responsive, laying the groundwork for future engagement. While ultimately board and senior staff must implement staffing and programmatic priorities, as a membership organization, it is in ABCD's best interest to factor these ideas into its strategic planning.

Members of all ages, departments and experience levels showed a marked interest in professionalism and ethics, as well as advocacy and labor management. They also were nearly universal in asserting that scholarships/youth should not be an ABCD priority.

RECOMMENDATION



Shift organizational emphasis to align with member priorities and needs. Communicate clearly to the members that the Association is taking seriously the suggestions of its members to undertake such realignments.

1. Increase support of and funding for advocacy efforts. Broad-based engagement of political leaders is a central Association task. It does this in ways that are more efficient and effective than any single department or group could do on its own.
2. Increase support of and funding for management issues. All members may not use these services on a regular basis, they should know, and have confidence in, the fact that this support is there for them, and that ABCD ensures that any member can be served when the need arises.
3. Consider establishing a specific function to address professionalism and ethical issues across the Association. Professionalism and ethics can become a central, defining way through which ABCD sets itself apart and defines the overall conversation about the Professional Field.

RECOMMENDATION



4. Balance the Association's emphasis on member services with the clearly demonstrated interest by members in receiving benefits and services. (see next recommendation)
5. Carefully consider the ongoing role and benefit of the scholarships and youth programs in the broader context of ABCD's work and service to its members.

There are in fact many who have benefitted from youth programs/scholarships, and there is great funding potential here, however this draws staffing and financial resources in ways that might not meet member needs, based on the results of the survey.

ABCD must take a serious look at the ROI for this work, and explore whether the goals of these initiatives can be accomplished by another nonprofit or allied association in Washington.

SITUATION



Members want and appreciate the benefits they receive. In fact, they are interested in receiving additional discounts and tangible benefits through their membership.

Members also very appreciative of the ways that ABCD provides support, guidance and advice at critical junctions in their lives, whether it's tax related, living arrangements or taking care of family members.

However, respondents also communicated clearly that they feel that ABCD should be spending less of its organizational resources on member services and benefits.

Yes, this is somewhat confusing.

RECOMMENDATION



While still maintaining the provision of specific benefits to its members, facilitate the Association’s shift to a more “service” oriented model that addresses the various needs of its members both active and retired.

ABCD is well suited to be very present to its members during key transition points in their lives and careers – new posts, retirements, etc.

- The value of membership can be articulated not only through the benefits that are delivered, but also through the level of service they are provided at key moments when they need it.

Review all interaction opportunities with members and more clearly define what of those interactions constitute a “benefit” of membership versus “services” that ABCD provides.

Consider ways to show members how best to be an “effectively engaged” ABCD member, or how they can take full advantage of available services and benefits.

SITUATION



Assuming that a more deeply engaged membership is a strategic goal of the organization, ABCD must make the effort to help members to understand

A) how they can be engaged and

B) what difference it makes when they are.

ABCD members have little to no idea what is being communicated by the Association to the broader public, however, these members could be much more effectively deployed as passionate advocates in the community and around the world for the role of XYZ, and the Professional Field.

RECOMMENDATION



Using the focus on “service” engagement, and building on a greater awareness of the broader Association’s work and impact, increase member engagement in ways that support ABCD’s larger strategic goals.

Help members to understand how they can be active and involved in ABCD even when they are in overseas posts.

- Identify potential barriers to involvement by members and address those barriers.

Communicate how member engagement through such efforts as “calls to action” benefits them, their department and the Professional Field.

- Provide ways for these professionals to be engaged advocates for the Professional Field and its role within their own spheres of influence.

FINAL RECOMMENDATION



Devote staff time and effort to review carefully the narrative responses to the key strategic and member benefits/services questions from the August/September 2014 survey.

Respondents shared a wide range of ideas and thoughts in the survey.

The staff must review these responses to deepen their sense of member attitudes, concerns and issues.

Respond to ideas and concerns raised in the survey. This will foster an atmosphere of trust that will promote increased responsiveness to future surveys or calls to action.



DISCUSSION

THANK YOU FOR YOUR ATTENTION

Marshall H. Ginn, CFRE

Capital Development Strategies LLC

Arlington, VA

marshall@capdevstrat.com

703-875-3000

