Fighting for Relevance

Being relevant to members in a constantly changing world
Cathi Hight, The Membership Specialist

- President of Hight Performance Group
- The nation’s member retention specialist
- Developer of *The Member Retention Kit* and *A New Approach to Tiered Membership*
- National instructor for the U.S. Chamber’s *Institute for Organization Management (IOM)*
- Previously was Vice President of Operations for the Chamber of Commerce of Hawaii
- Serves on the Member Relations Council for the Austin Chamber
- Is a member of the:
  - Association of Chamber of Commerce Executives (ACCE)
  - American Society of Association Executives (ASAE)
Change is All Around Us
Driving Forces Create Challenges

• The Recession and the Recovery
  ○ Housing meltdown
  ○ Wall Street tumbles
  ○ Massive layoffs

• Demographics
  ○ Aging Boomers exit the workforce
  ○ Millennials dominate the workforce
  ○ Different generations, different values

• Technology
  ○ Social media revolution
  ○ Cloud computing
  ○ Mobile society

• Time Poverty
  ○ People are busier than ever
  ○ ROI expectations for time invested
  ○ Board size, volunteers and attendance
How This Relates to Fundraisers and Donors

August 2014

July 2014

May 2014

April 2014

March 2014

February 2014

January 2014

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## Different Generations, Different Values

### GENERATION DIFFERENCES (Generations and the Future of Association Participation report)

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<thead>
<tr>
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<tbody>
<tr>
<td><strong>Baby Boomers</strong></td>
<td>Hard work leads to success</td>
<td>Anti-authority</td>
<td>Digital Society</td>
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<tr>
<td><strong>Characteristics</strong></td>
<td>Loyal to brands</td>
<td>Self-reliant and autonomous</td>
<td>Feel entitled to a “seat at the table”</td>
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<tr>
<td><strong>Generation X, Gen X, Xers</strong></td>
<td>Confident</td>
<td>Family-focused</td>
<td>Lateral, collective problem solving</td>
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<tr>
<td><strong>Their Experiences</strong></td>
<td>Competitive</td>
<td>Cautious</td>
<td>Globally and diversity inclusive</td>
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<tr>
<td><strong>Generation Y, Gen Y, Millennial, Echo Boomers</strong></td>
<td>Rebellious to status quo icons</td>
<td>Limited loyalty</td>
<td>Immediate ROI and feedback</td>
</tr>
<tr>
<td><strong>Communication Style</strong></td>
<td>Digital Society</td>
<td>Feel entitled to a “seat at the table”</td>
<td>Micro-managed by parents, born with technology, always rewarded for participation. Reared to be high achievers.</td>
</tr>
<tr>
<td><strong>Their Experiences</strong></td>
<td>Baby Boomers grew up in time of affluence. Reared to pursue the American Dream.</td>
<td>Children of workaholics and divorce, cable TV. Reared to be self-sufficient (latch key kids).</td>
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</tr>
<tr>
<td><strong>Communication Style</strong></td>
<td>Prefer detailed face-to-face dialog or via phone</td>
<td>Prefer concise communication without over-explaining</td>
<td>Prefer frequent feedback and problem solving via technology instead of phone calls or meetings</td>
</tr>
<tr>
<td><strong>Problems They Are Facing Right Now</strong></td>
<td>Prefer in-person meetings</td>
<td>Prefer e-mails</td>
<td>Collaborative</td>
</tr>
<tr>
<td><strong>Problems They Are Facing Right Now</strong></td>
<td>Believe no news is good news</td>
<td>Prefer concise communication without over-explaining</td>
<td>Prefer frequent feedback and problem solving via technology instead of phone calls or meetings</td>
</tr>
<tr>
<td><strong>Problems They Are Facing Right Now</strong></td>
<td>Dwindling retirement funds</td>
<td>Debt</td>
<td>Debt</td>
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<tr>
<td><strong>Problems They Are Facing Right Now</strong></td>
<td>Job dislocation</td>
<td>Caring for young children and aging parent</td>
<td>Unemployment</td>
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<tr>
<td><strong>Problems They Are Facing Right Now</strong></td>
<td>Rising health care costs or inadequate health care coverage</td>
<td>Balancing life and career</td>
<td>Difficulty transitioning from college to career</td>
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<tr>
<td><strong>Why They Join</strong></td>
<td>Stuck in middle management</td>
<td>Stuck in middle management</td>
<td>Negative stereotypes</td>
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<tr>
<td><strong>Why They Join</strong></td>
<td>Opportunities to lead and leave a legacy</td>
<td>Opportunities to further careers and upper leadership positions</td>
<td>Being taken seriously</td>
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<tr>
<td><strong>Why They Join</strong></td>
<td>Support social causes</td>
<td>Opportunities to further careers and upper leadership positions</td>
<td>Opportunities to learn from others</td>
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<tr>
<td><strong>Volunteer Styles</strong></td>
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<td><strong>Volunteer Styles</strong></td>
<td>Want to lead and manage others</td>
<td>Want autonomy</td>
<td>Work on teams for outcomes</td>
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<tr>
<td><strong>Volunteer Styles</strong></td>
<td>Serve on committees and teams</td>
<td>Opportunity for key leadership role</td>
<td>Lack of hierarchy</td>
</tr>
<tr>
<td><strong>Volunteer Styles</strong></td>
<td>Like to hold regular meetings and discuss strategies</td>
<td>Hate being micromanaged or meeting just to meet and waste time</td>
<td>Recognition of teammates</td>
</tr>
<tr>
<td><strong>Volunteer Styles</strong></td>
<td>Want to lead and manage others</td>
<td>Hate being micromanaged or meeting just to meet and waste time</td>
<td>Collaborative content, decisions</td>
</tr>
<tr>
<td><strong>Flaws</strong></td>
<td>“Been there done that” attitude</td>
<td>Difficulty committing</td>
<td>Short attention spans</td>
</tr>
<tr>
<td><strong>Flaws</strong></td>
<td>Not always open to new ideas</td>
<td>Tend to have a “wait and see” approach</td>
<td>Expect immediate responses</td>
</tr>
<tr>
<td><strong>Flaws</strong></td>
<td>Constant change</td>
<td>“What’s in it for me?”</td>
<td>Asks “what’s in it for me?”</td>
</tr>
<tr>
<td><strong>Flaws</strong></td>
<td>Lack of respect for past loyalty</td>
<td>Chaos, distrust, loyalty that goes unrewarded</td>
<td>Dismissing new ideas because of their lack of experience</td>
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<td><strong>Turn-offs</strong></td>
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Are Millennials Joiners?

“Younger people seek and demand a return for membership, including tangible member services, high levels of accountability, identifiable career advantages, a sense of professional community, and opportunities to serve within associations.”

Generations and the Future of Association Participation
published by the William E. Smith Institute for Association Research
Common Member Interests and Needs

- **Support a thriving local economy**
  - Education, transportation, talent attraction, job creation
  - Promote the local area and region

- **Influence a business-friendly environment**
  - Develop relationships with policy and regulatory decision-makers
  - Create a positive sentiment toward business

- **Develop a skilled existing workforce**
  - Skills development on current and emerging needs
  - Leadership development for younger talent and succession plans

- **Provide support to growing enterprises**
  - Local and global visibility, advertising and marketing opportunities
  - Cost savings, experts and mentors, and strategic connections

- **Create opportunities to build a local network**
  - Networking and events at no or low cost to schmooze
  - Welcome newcomers, reps and new businesses seeking connections
## Member/Donor Profile Matrix

**Get Something Done Through You**

<table>
<thead>
<tr>
<th>Community/Industry Investors</th>
<th>Community/Industry Builders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mission funders</td>
<td>Sustainable, thriving economy</td>
</tr>
<tr>
<td>Long-term vision, strategic direction</td>
<td>Business-friendly environment</td>
</tr>
<tr>
<td>Business-friendly environment</td>
<td>Seen as a leader, strong brand</td>
</tr>
<tr>
<td>Support sustainability for all</td>
<td>Execute on corporate initiatives</td>
</tr>
<tr>
<td>Do the right thing (civic-minded)</td>
<td>Workforce development</td>
</tr>
</tbody>
</table>

**Business Investors**

- Lower operational costs, regulations
- Advertising and marketing to drive traffic and sales w/out involvement
- Attract and retain skilled staff
- Access to experts, best practices

**Business Builder**

- Just-in-time needs (leads=sales)
- Immediate ROI w/ limited investment
- Exposure, connections
- Personal visibility
- I am the brand

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**Get Something for Their Business**
Top Membership Model Trends and what fundraisers can learn too

• Customized
  – Members custom-build their membership packages to suite their interests and needs (base membership + add-ons)
  – Pros: Members choose what they want, which leads to higher engagement
  – Cons: Members may not value benefits

• Electronic (virtual)
  – Membership restricted to web-based resources and programming
  – Pros: New streams of revenue are added with incurring expenses (e.g., printing)
  – Cons: Memberships provide limited access so they generate less revenue

• International
  – Membership is accessible worldwide
  – Pros: Membership expands into new markets
  – Cons: Benefits may need to be developed and engagement be more difficult

• Multitier
  – Menu of membership options based on interests, professional designation, budget
  – Pros: Members like being able to choose which options best suit their needs
  – Cons: Requires the ability to manage multiple benefits for multiple audiences

• Open (freemium)
  – Membership does not require the payment of dues
  – Pros: Leads to substantial membership growth (more people in the playground)
  – Cons: People perceive there’s no value because there’s no cost to join
Transformation

Old

- Financial Model: Fair share dues & events
- Boards: Large, CEOs, Boomers
- Members: Local
- Programs: Add++, in-person, variety
- Motto: Get involved, get results

New

- Financial Model: Multi-Revenue Sources
- Boards: Small, Experts, Diverse
- Members: Local & global
- Programs: Strategic, multi-media, solution/cause-oriented
- Motto: Access, Resources, Solutions

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3 Strategies to Consider

Understand What Matters to Them

Identify Your Roles

Offer What Matters

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Fighting for Relevance
Strategy 1: Understand What Matters to Them

• Find out about member/donor challenges
  ○ Surveys
  ○ Interviews
  ○ Quick Polls
  ○ Phone Calls
  ○ Focus Group
Strategy 1: Understand What Matters to Them

• Leverage tools like MySidewalk to educate and poll members / donors on issues

• Sidewalk Insights provides response analytics by age, zip code, and other demographics
Strategy #2  Identify Your Roles

- Global Competency
- International Development
- Workforce Development
- Mission Sustainability
- Advocacy/Political Action
- Leadership & Development
- Community Development
Strategy 3: Offer What Matters

- Ask members / donors if they value what you offer
  - Surveys
  - Interviews
  - Quick Polls
  - Phone Calls
  - Focus Groups

Rate the Value of Our Membership Benefits

Please let us know if these membership benefits of the Little Rock Regional Chamber of Commerce are of value to you, your employees and/or your organization. If you were not aware of an event or service, please mark N/A.

1. Chamber Groups

<table>
<thead>
<tr>
<th>Benefit</th>
<th>High Value</th>
<th>Moderate Value</th>
<th>Low or No Value</th>
<th>Not Aware</th>
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<tbody>
<tr>
<td>Ambassadors</td>
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<tr>
<td>Business Diversity</td>
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<tr>
<td>Create Little Rock (young professionals)</td>
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<tr>
<td>Leadership Greater Little Rock</td>
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<tr>
<td>Leads Groups</td>
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<tr>
<td>Operation Thank You Volunteers</td>
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<tr>
<td>Stock in the Rock (Economic Development Program)</td>
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3. Events/Programming

<table>
<thead>
<tr>
<th>Event</th>
<th>High Value</th>
<th>Moderate Value</th>
<th>Low or No Value</th>
<th>Not Aware</th>
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<tr>
<td>.59 Minutes</td>
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<tr>
<td>Ambassadors Golf Tournament</td>
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<td>Annual Meeting</td>
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<td>Arkansas Film Series</td>
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<td>Bowling for Business</td>
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<tr>
<td>Business Diversity Opportunity Brunch</td>
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<td>Coffee Council</td>
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<tr>
<td>Create Little Rock Grad Student Gig</td>
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<td>Create Little Rock 101</td>
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<tr>
<td>Create Little Rock Land in the Rock</td>
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<td>Fortune 500 Series</td>
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<tr>
<td>Hispanic Business Series</td>
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<tr>
<td>Leadership Greater Little Rock</td>
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<tr>
<td>Legislative Reception</td>
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<td>Little Rock Live</td>
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<tr>
<td>Minority Enterprise Development Week</td>
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<tr>
<td>Operation Thank You</td>
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<td>Partners in Education</td>
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<tr>
<td>Ribbon Cuttings</td>
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<td>Second Congressional District Luncheon</td>
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<tr>
<td>Serve the Rock</td>
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<td>Small Business Success Series</td>
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<tr>
<td>Speed Networking</td>
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<td>Taste of the Rock</td>
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<tr>
<td>Women Business Series</td>
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Align Your Benefits for Access, Resources & Solutions

- Access for the specific needs of the type of member / donor
- Resources that are available through people, partners, publications, and virtually
- Solutions that matter to the member / donor
  - Strengthening the local economy
  - Building corporate brand
  - Education/skills development
  - Mentoring, counseling, experts
  - Information (FYI, Just in Time)
  - Visibility (marketing, exposure)
  - Connections to the right audience

- Tiered benefits model that align with interests, needs, budgets
- Unique opportunities through your relationships and expertise
- Web sites with self-serve opportunities (portals to members-only sections)
- Social networking (Special Interest Groups with exclusive access, collective content development)
- Virtual events (e.g., webinars, webcasts, podcasts, conferences, forums, expos)
- Partnerships that deliver resources & value for specific business needs
  - Online, virtual education
  - Buy/sell portals (for RFPs, quotes, barters)
  - GIS services
  - Talent portals, assessments, internships
  - Commercial property listings
Provide Virtual Education

Virtual Conference

Registration is still available for the archived ACRL 2013 Virtual Conference; registration materials are below.

Originated April 11–12 during ACRL 2013, the ACRL 2013 Virtual Conference will provide academic and research libraries unable to make the trip to Indianapolis an affordable opportunity to participate in the conference. For those libraries with reduced support for professional development and travel, the Virtual Conference is a great way to leverage a small investment into large learning opportunities.

Like its face-to-face counterpart, the ACRL 2013 Virtual Conference will run on a real-time schedule. The online conference features twelve live Webcasts, as well as asynchronous activities, allowing for convenient scheduling and flexibility. The Virtual Conference archive is available for one year and will include more than 130 slideshows/PowersPoint or other presentations synced with audio of the speakers from every contributed paper. Cyber Zed Shred presentation, invited paper, and panel session presented at the face-to-face conference in Indianapolis.

Access the Virtual Conference here; use this invitation key sent to face-to-face and online only registrants to log into the site.

Presentation Formats

Webcasts (Synchronous): Interactive webcasts are offered in real-time, while presenter show visuals such as PowerPoint slides and lecture applications. Participants can interact with workshop exercises by taking live action in horns.
Offer Peer-to-Peer Collaboration

Solutions
Strategically Connect Members / Donors

AboutOurwork.com

https://www.youtube.com/watch?v=rNT97J-8b94
It’s Time to Think Strategically

FROM

SHOTGUN
LOCALIZED
SINGLE ENTITY
EVENT-FOCUSED
TRANSACTIONAL

TO

TARGETED
GLOBAL ACCESS
COLLABORATIVE
SOLUTION-FOCUSED
TRANSFORMATIONAL

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Are You Ready for the New?

Future of Business

Future of Associations and Charities

Future of Being Relevant
Summary

• Trends are changing the landscape for our members, donors, and communities

• Know the concerns of constituents and realize that different types of members / donors have different values and interests

• Consider your role and how you can best serve the community and members / donors

• Associations and charities need to adapt what they offer and how they engage to meet the changing needs of their target markets or they’ll become non-essential