



Membership Surveys

Membership organizations have a distinct advantage over many for-profit businesses – they know who their members are and can more easily communicate with them. Additionally, members themselves have a vested interest in seeing the organization – *their organization* – succeed and are therefore more willing than typical “customers” to share their opinions and experiences.

Members want to feel good about their decision to join the organization. They want to feel that being a member has value, either for themselves, for others, their industry, or for a cause they care about. Delivering on that value, so members will feel proud of belonging to the organization, is critical to success.

The most significant challenge for many associations is retention and recruitment. Relevance is key - what motivates people (or companies) to join, what motivates them to renew, what makes membership worthwhile – these are fundamental questions that can be addressed with a member survey.

Most associations offer an array of benefits and services to encourage membership and strengthen members' operations. Most also provide mechanisms whereby members can express their concerns. However, it is often the case that many benefits and services are underutilized and participation in committees and other activities is limited to a core group of members that are willing to attend meetings and speak up. The views of this core group, while important, are not necessarily the views of the entire membership. A deep understanding of your entire membership - their values, opinions, and what they want from the organization - is key to keeping the organization vital and moving forward.

Membership surveys are the best tool to develop that deep understanding. With research that is properly designed and conducted you can hear from all segments of the membership or one or more targeted segments.

Omnibus Member Survey

So named for the omnibus that holds many passengers, this survey addresses many topics; it's what most people have in mind when they think about a membership survey. This survey assesses member awareness of organization positions, products, and services; agreement or disagreement with the mission and policy positions; the level of awareness and involvement in programs and activities; use of communications media like emails and the website. The survey identifies ways to make the organization more relevant to the greatest number of members in order to increase participation and involvement.

For trade associations, the omnibus survey usually includes questions from different departments: education, government affairs, communications, etc, which allows departments to better implement their own strategic plans. Repeating the study every 2-5 years allows departments to fine-tune their plans. When studies are repeated in this way, they are often designed so that some of the questions remain unchanged (such as awareness questions and service evaluation questions) so results can be tracked over time. Questions related to current or proposed issues, policies, or activities, change each cycle.

Here are some examples of topics that can be addressed in omnibus surveys. Having members' perspectives on these can help you make better use of resources and fine-tune what you offer:

- **Motivation** – Why members join or why they renew; is it to support a cause, for financial benefit, or another reason? Are you really meeting expectations ... the reasons members joined in the first place?
- **Politics & Policies** – Prioritizing issues, agreement or disagreement with policies and the reasons why.
- **Services & Programs** – Awareness and use of what the association offers, what members like or don't like and why they participate or don't participate.
- **Service Quality** - Members have higher service expectations than ordinary retail customers. Quality service has multiple dimensions ... it's more than just friendliness. In some organizations, responsiveness is most important, in other organizations it's expertise. Find out where you are meeting, exceeding, or failing to meet members' customer service expectations.
- **Training, Education, & Certification** - These essential programs for many trade associations can be improved with member input concerning awareness, appropriateness, content, usefulness, and satisfaction.
- **The Mission** - Do members agree with and support the mission? Is it relevant to them today? Would they like to see the association move in another direction?
- **Facilities** - For many membership organizations, like museums, health clubs, and recreation or entertainment organizations, facilities are a key element driving member involvement and satisfaction. Members can evaluate the pros and cons of facilities across many dimensions, such as location, atmosphere, cleanliness, equipment, lighting, amenities, and personal safety.
- **Communications** - A survey can help maximize the effectiveness of various communications media (newsletters, websites, emails, action alerts, videos, social media, etc.) by examining use, likely use, satisfaction with content and value of proposed content.
- **Events** – Organizing and producing events can be time-consuming and expensive. Surveys can be used to plan and evaluate events, and to help make decisions about the types of events to stage. In some cases surveys can be incorporated into an event. Better information can make events more relevant and more successful, and can identify barriers to better attendance.

Focus Survey

The advantage of the Omnibus Survey is that it addresses many topics and can be utilized across many departments. Unfortunately, it doesn't typically dive deep into any single issue. Sometimes what's needed is to examine one or two issues in great depth. A focus survey can do that.

The focus survey can also be conducted as a follow-up to selected respondents from an omnibus survey. Imagine that the omnibus survey identifies a serious problem, but doesn't provide the depth of response to really understand why the problem exists or what should be done about it. Members that reported this problem can be contacted again and asked more focused questions. If we have their email addresses, the focus survey can be conducted online.

The data from the focus survey can be merged with the data from the omnibus survey, eliminating the need to re-ask demographics or other questions required for analysis.

New Member Survey

Unlike surveys where many members are contacted simultaneously, the New Member Survey is on-going, with members contacted individually soon after joining. The questionnaire can be used to learn more about new members and/or their company, how they learned about the organization, why they joined, and the benefits they hope to realize from membership. Questions can be asked about the recruitment/sign-up process. Did new members receive the information they needed? Were benefits explained?

Some membership organizations offer a vast array of products, benefits, and programs. Sometimes these are poorly explained to new members and there is little if any effort to better integrate newcomers into the organization. A new member survey questionnaire can list (with descriptions) essentially every benefit the organization offers and ask new members to indicate their interest in knowing more. With this information in hand, the organization can contact new members to address their individual interests. Increasing the number of ways an individual member utilizes or participates in the organization also improves the chances they will maintain their membership. The questionnaire can also include important demographic metrics to add to your member database.

Although questions are distributed individually, the responses are entered into a database that accumulates in size over time. Reports can be issued periodically (e.g., quarterly or annually) with results tracked over time.

Lost Member Survey

Don't write-off members that don't renew - survey them instead. Knowing why they didn't renew their membership is critical information, especially if membership size is declining. Was the decision purely financial or did the association fail to meet their expectations in some way? What benefits were they looking for that they didn't find? What would it take to get them back? These are questions that must be answered to maintain enrollment numbers. At the very least it will tell you the percentage of member loss that is unavoidable.

Non-Member Survey

With associations that have a defined membership, like trade associations, it is possible to identify companies that are eligible for membership but haven't joined. A non-member survey can find out if they are aware of the association, aware of the benefits, if they have been contacted by the association, and if they would like to be contacted. We cannot make actual sales calls, but we can provide non-members with contact information, and if they want to be contacted, we can provide you with their name and contact information.

Typically, non-member surveys focus on identifying the primary barriers to enrollment and the primary drivers that would encourage membership. It is also possible to match questions in a non-member survey with those from a member survey thus allowing us to compare members with non-members on key factors. Both groups, for example, could be asked about which legislative issues are most important, or which topics they would like to know more about. Question phrasing can be changed slightly, e.g., from "which of the following services are most valuable to your company?" for members, to "which of the following services would be most valuable to your company?" for non-members.

Co-op Member Survey

A co-op survey is one in which multiple associations can share either a membership survey or a focus survey regarding some issue. For example, some associations have multiple chapters within a state and they might share a survey, or three or four state associations might share a survey. Normally, a co-op survey is used as a lower-cost alternative to each party conducting the survey on their own. Typically, the sample size for each participating association is fairly small (depending on how the study is set up) but the overall sample size is statistically valid. A feature of the survey is that individual associations can compare their results against the overall total and against each other (associations can be either named or anonymous in the results). Depending on the needs of participants, some questions are asked of all respondents and some are unique to individual participants; usually about 80% of the questions are "in-common" and 20% are unique.

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