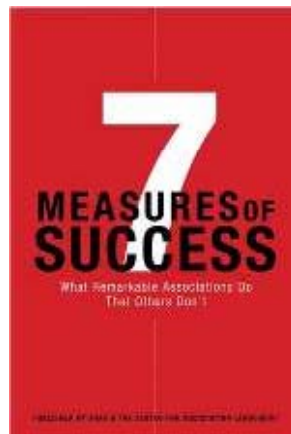


Commitment to Analysis and Feedback

Maryland Society of Association Executives

November 16, 2007

Michael Sherman, Ph.D., CAE



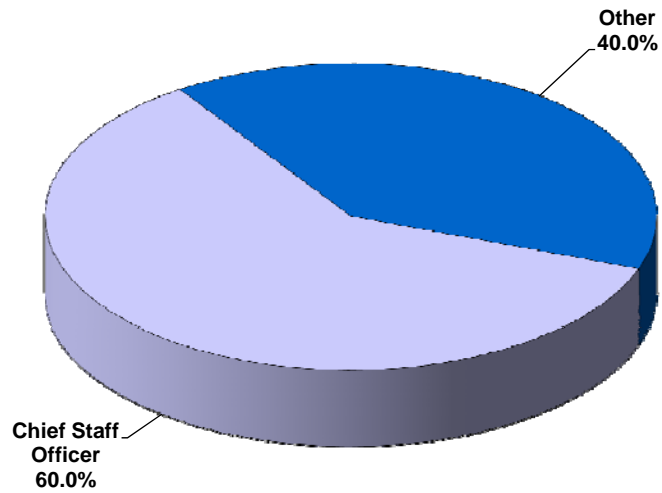
What Remarkable Associations Do That Others Don't

Outline

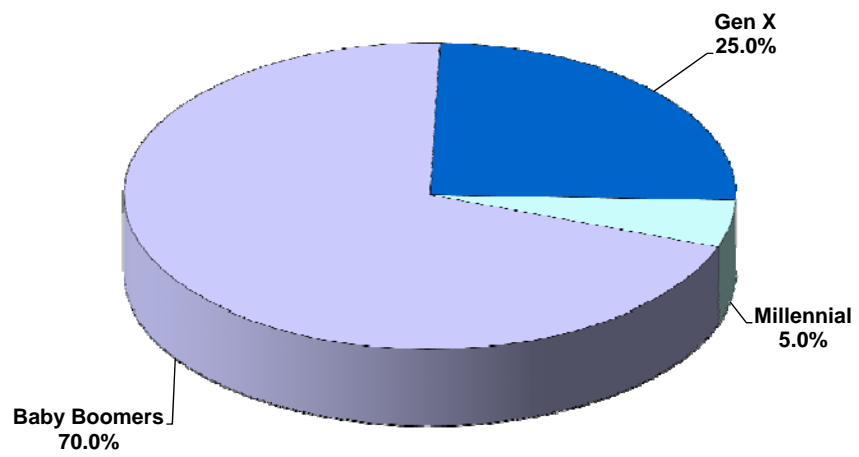
- **Who's Here**
- **7 Measures Methodology**
- **Data-Driven Strategies**
- **Dialogue and Engagement**
- **CEO as Broker of Ideas**
- **Examples of Association Surveys**

■ **“Who are you?”**

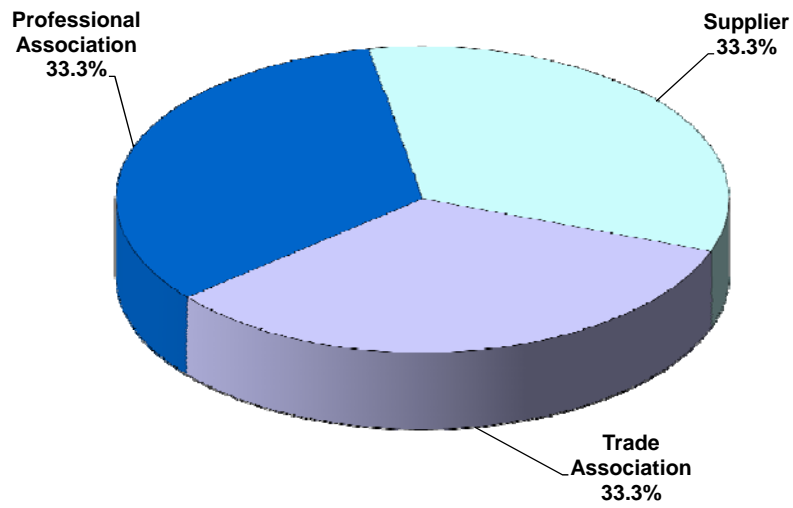
Position



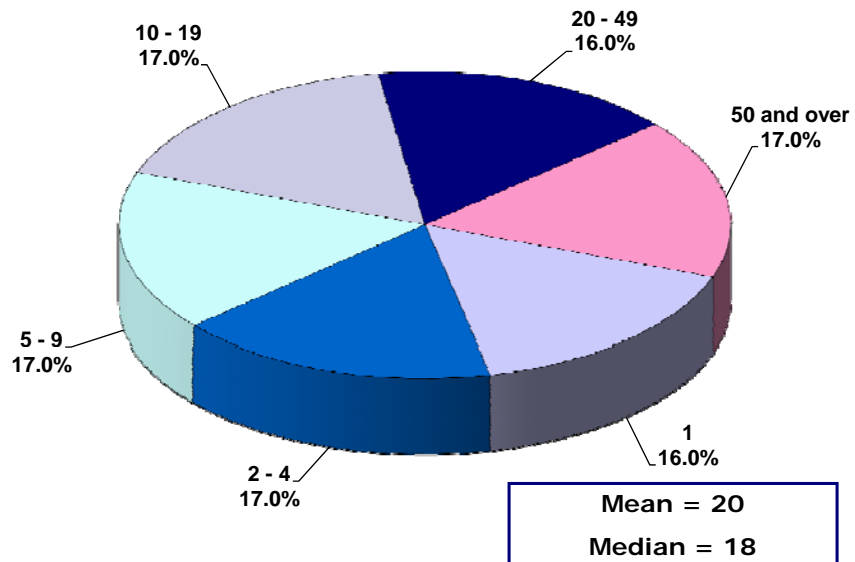
Generation



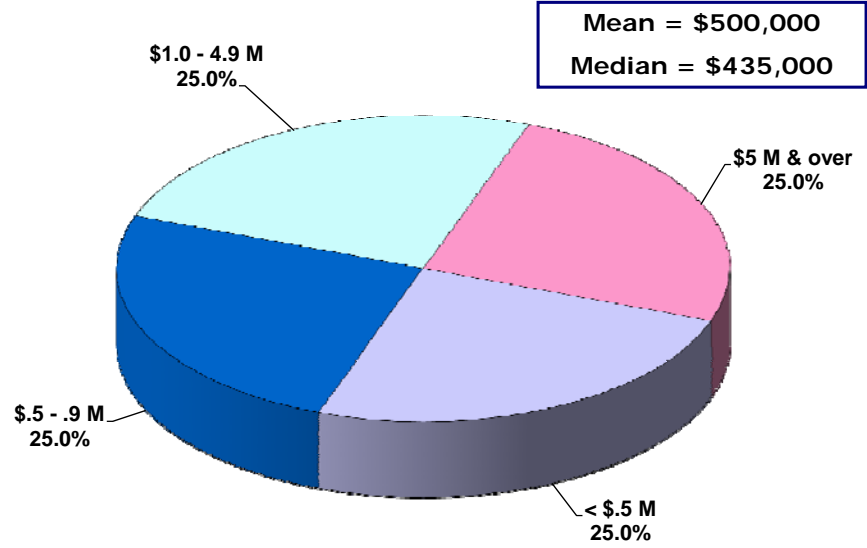
Organization Type



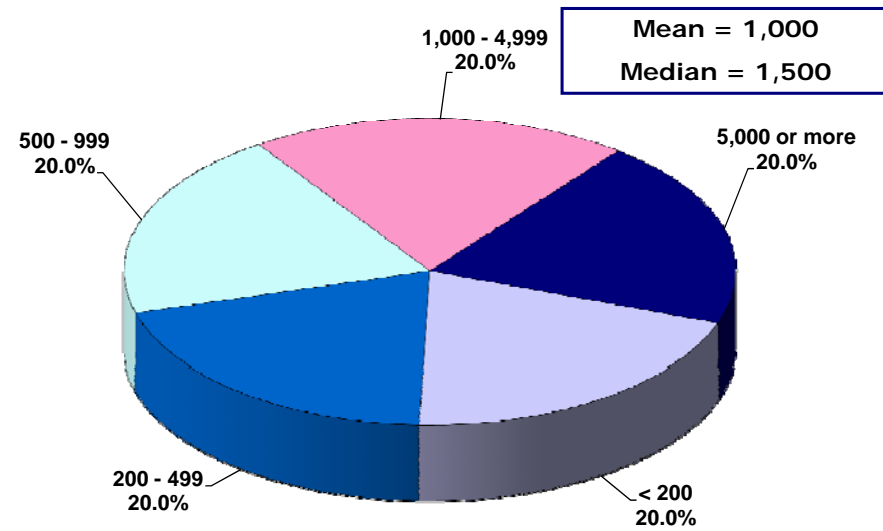
Full-Time Employees



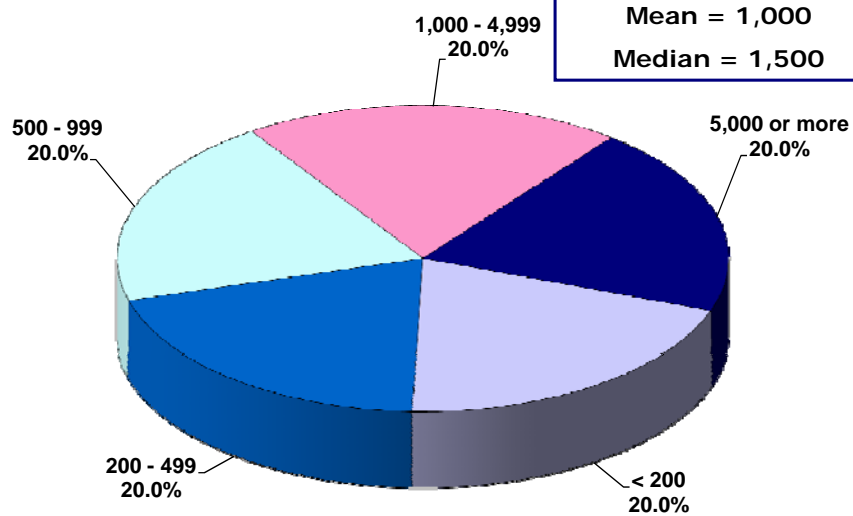
Annual Budget



Number of Members



Number of Member Contacts



Association Activities

- E-mail Newsletter 76%
- Trade Show 25%
- Needs Assessment 33%
- Online Surveys 65%
 - Vendor/Consultant 25%
 - Survey Monkey 15%
 - Zoomerang 10%
 - Other 20%

Productivity Measures

	Mean	Median
■ Budget/Member	\$1,000	\$2,000
■ Budget/FT Employee	\$5,000	\$1,000
■ Members/FT Employee	750	1,000
■ Contacts/Member	1,750	1,000

7 Measures of Success

- ***Good to Great***
- **Jim Collins**
- **Matched Pair Analysis**

ASAE Measures of Success Project

- 2002-2006
- 16 Association Executives
- ASAE Staff

- 104 Associations invited (jury process)
- 42 Agreed to participate

Data Reviewed/Criteria

- Finances
- Membership
- Leadership
- Organizing Structure
- Interviews
- Criteria
 - 20 years or older
 - More than one CEO

Study Group

- 9 “Remarkable” Associations
 - Trade, Professional, Philanthropic
 - State, National, International
 - Small, Medium, Large
- 9 “Good” Associations for comparison

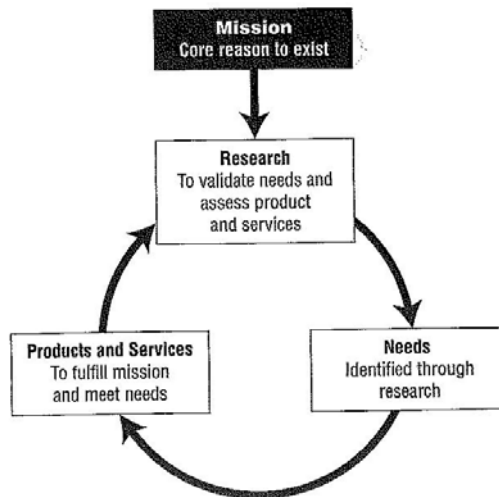
Remarkable Associations Profile

	Mean	Median
■ Members	4,454,576	35,000
■ Employees	443	200
■ Budget	\$204,644,444	\$59,950,000

Remarkable Associations Productivity Measures

	Mean	Median
■ Budget/Member	\$3,025	\$854
■ Budget/Employee	\$876,782	\$254,412
■ Members/Employee	2,987	407

Input and Output Framework





Commitment to Analysis & Feedback

- **Measure 3: Data-Driven Strategies**
- **Measure 4: Dialogue and Engagement**
- **Measure 5: CEO as a Broker of Ideas**



Measure 3

- **Data-Driven Strategies ...**
 - **and Tactics**



Strategy:

- Long-term plan
- Overall approaches
- Forward looking
- Governing body

Tactics:

- Short-term goals
- Specific goals
- Present time
- Management team



Data, Data, Data

- Gather
- Analyze
- Use



Data/Information Sources

- Informal/Anecdotal
- Quantitative
- Qualitative
- Internal Sources
 - HR
 - Member Relations
 - Customer Service



Research Tools

- Member Needs Surveys
- Meeting Evaluations
- Readership Surveys
- Customer Service Metrics
- Exit Survey



Research Tools

- Educational Needs Assessment
- Government Affairs Priorities
- Financial Performance
- Web Metrics
- Meeting Statistics



Meeting Data and Information

- Room History
- Pickup Rate
- Cancellations
- Walks
- Timing of Registration
- Effect of Incentives (Early Registrations)

Environmental Scans

- Secondary Research
- Other Associations
- Government Data
 - Census, BLS, Agencies
- Competition (Associations and For-Profits)

The “Backward” Research Process

- Determine key decisions to be made
- Determine what information is needed
- Determine what questions are needed
- Design sample
- Implement research design
- Analyze data
- Write report
- Implement results
- Evaluate research process

COMPARISON OF RESEARCH TECHNIQUES

	Survey Techniques				
	<i>Mail</i>	<i>Online</i>	<i>Telephone</i>	<i>Individual Interviews</i>	<i>Focus Groups</i>
Relative Cost	High	Moderate	Moderate	High	High
Length of Time	Long	Short	Shortest	Long	Short
Response Rate	Low	Moderate	High	Moderate	High
Respondent Confidentiality	High	High	Low	None	None

Writing Survey Questions

■ Validity

- Every respondent should interpret each question the same

■ Types

- Close-Ended
 - Yes/No
 - Multiple Choice
 - Rating Scales
 - Open-Ended
- Open Ended

Inadequate or Ambiguous Wording

Poor

“How many member contacts do you have?”

Good

“How many individuals are in your database as a member, meeting participant, subscriber, etc.? (exclude former and prospects)”

Question Bias

Poor

“Should we raise dues for our suppliers who can afford it more than we can?” (*Not objective*)

Good

“Do you believe that we should increase the dues paid by supplier members from \$150 to \$200 per year?”

Double-Barreled Questions

■ Poor

“Does your association have a strategic plan and a planning committee?” Yes No

■ Good

“Does your association have a strategic plan?”
 Yes No

“Does your association have a planning committee?” Yes No

Irrelevant Questions

“How old is your association?”

SAMPLE RATING SCALE QUESTION

“Please indicate how useful you think the association magazine is:”

<i>Very Useful</i>	<i>Useful</i>	<i>Neutral</i>	<i>Not Useful</i>	<i>Not Useful At All</i>	<i>Familiar But Do Not Use</i>
1	2	3	4	5	6

B A R A S S O C I A T I O N

MEMBER NEEDS ASSESSMENT

*All individual responses will be kept strictly **confidential**, and only composite results will be used for analysis.*

ABOUT YOU

1. In what county is your principal office? _____
2. When were you born? 19 ____
3. Are you? Male Female
4. How many years have you practiced law? _____ Years

ABOUT YOUR PRACTICE SETTING

5. Please describe your practice setting: *(Check only one)*

1. <input type="checkbox"/> Solo practitioner	7. <input type="checkbox"/> Corporate counsel
2. <input type="checkbox"/> Equity partner/Shareholder in a law firm	8. <input type="checkbox"/> Of Counsel
3. <input type="checkbox"/> Non-equity partner in a law firm	9. <input type="checkbox"/> Legal services/non-profit

ABOUT MEMBERSHIP

14. How long have you been a member of ? _____ Years
15. Are you, or have you been involved in the past three years in the leadership?
(Check all that apply)

a. <input type="checkbox"/> Board of Governors	d. <input type="checkbox"/> Section Chair
b. <input type="checkbox"/> Committee Chair	e. <input type="checkbox"/> Not involved
c. <input type="checkbox"/> House of Delegates	f. <input type="checkbox"/> Other <i>(Specify)</i> _____

Survey Sampling

■ Sampling Methods

Probability Techniques

Random Sample—everyone has equal chance of being selected

Systematic (nth) Sample—strategy e.g., oversample states

■ Non-Probability Techniques

Convenience—at convention

Quota—first 10 mfrs.

■ Sample Size — magic # = 370

SAMPLE SIZES REQUIRED FOR FINITE POPULATIONS

95% Confidence Level

Percent in population assumed to be 50%

Sample Error = $\pm 5\%$

<i>Size of Population</i>	<i>Number of Respondents Needed</i>	<i>Sample Size for 35% Response Rate</i>
1,000	278	794
2,000	322	920
3,000	341	974
4,000	350	1000
5,000	357	1020
10,000	370	1057
20,000	377	1077
50,000	381	1089
100,000	383	1094
>500,000	384	1097



Research Request for Proposal Guidelines

Research Objectives

Purpose of Research

(e.g., determine member needs, identify new market, select meeting sites)

Why research is being conducted

(e.g., directed by committee, part of strategic planning, staff directed marketing research)



Services Desired

(e.g., Instrument design, Data collection, Data tabulation

Analysis, Printing/postage/mailing)

Size of Population to be Surveyed

(e.g., 2,000 regular members and 500 suppliers, 35 board members, 10,000 registered nurses, etc.)

Response Rates from Previous Surveys



Desired Completion Date

Other Important Dates

(e.g., committee meetings for planning,
Board/membership meetings for presentations.)

Special Characteristics of Respondents

(e.g., usually out of office for vacations in July, too busy
just before tax season, easier to reach by phone,
etc.)

**Is Experience in Industry or Profession
Required or Helpful?**



Who Will Make Decision?

(committee, board, department head, etc.)

Basis for Selecting a Vendor

(e.g., cost, experience, references, etc.)

When Will Decision Be Made?

Online Surveys

- **Contract Out**

- Research Firms
 - Consultants
 - Faculty

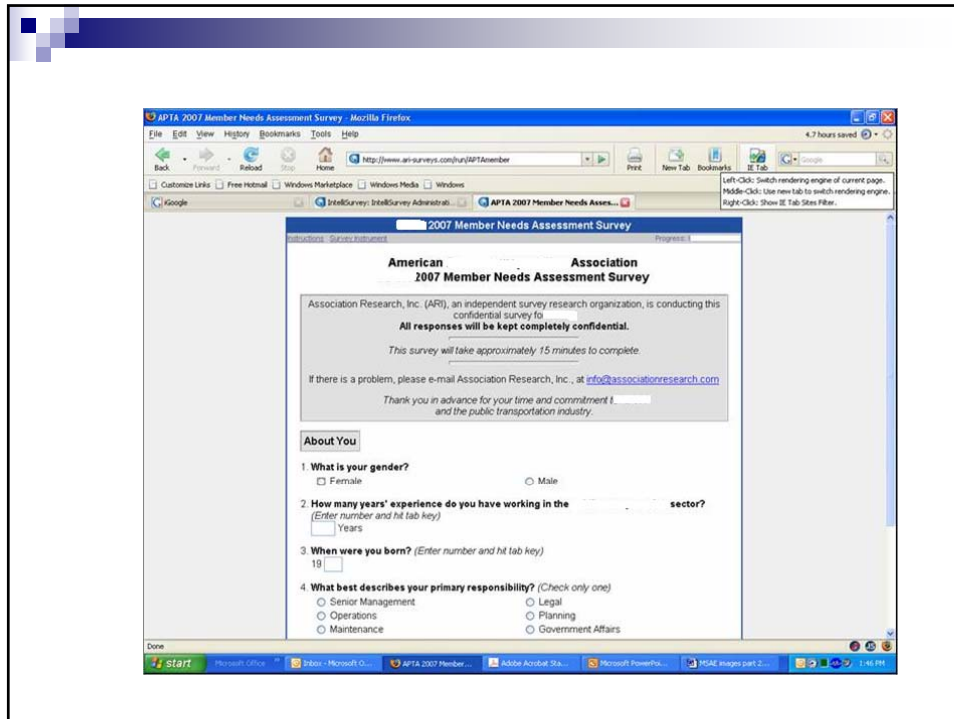
- **Do It Yourself**

- **Online Survey Systems**

- Survey Monkey.com
 - Zoomerang.com
 - InstantSurvey.com
 - Inquisite.com


E-mail Sample Issues

- Non-personal e-mail
(info@xyzcompany.com)
- Bounces
- Not opened
- Not read
- Not saved (short shelf life)



Golden Rules of Surveys

- *Don't ask if you don't want to know the answer.*
- *Don't ask if you are not willing to make changes.*
- *Don't use a survey to promote products/services.*
- *Don't survey if the report is destined for the shelf.*
- *Don't ask for more than you need.*



Measure 4
Dialogue & Engagement



Data and Information Available to:

- Senior Managers
- Elected Leaders
- All Other Staff
- Learn about the members—visits, attend meetings

Constant Communication

- Staff collaboration to serve members
- Silos

Measurement Methods

- Employee survey
 - Confidential
 - Independent
- Random assessments of employees, volunteers, members, etc.

Measure 5

- **CEO as a Broker of Ideas**

CEO - the steward, not the owner

- Understand members vision
- Engage others
 - Defining vision
 - Refining vision
 - Responding to the organization vision

CEO Qualities

- CEO does not have to come from outside
- Autocratic, controlling, CEO vanishing
- Good listener
- Fosters team/family environment
- Steps aside

Measurement Methods

- Review current and past CEOs
- Did others generate new products/ services/ ideas?
- Did CEO projects get more support?
- Whose proposals were implemented?
- Time outside with members and stakeholders
- Interest in new material

Remarkable Associations

- Ask what members need
- Eliminate programs and services that no longer serve members
- Are methodical and disciplined about collecting member data and opinions
- Use data vertically and horizontally

Good Associations

- Decide what members need
- Hang on to what may have worked in the past but may now be irrelevant
- Take a random, inconsistent approach to gathering member data
- Use data vertically (top down)

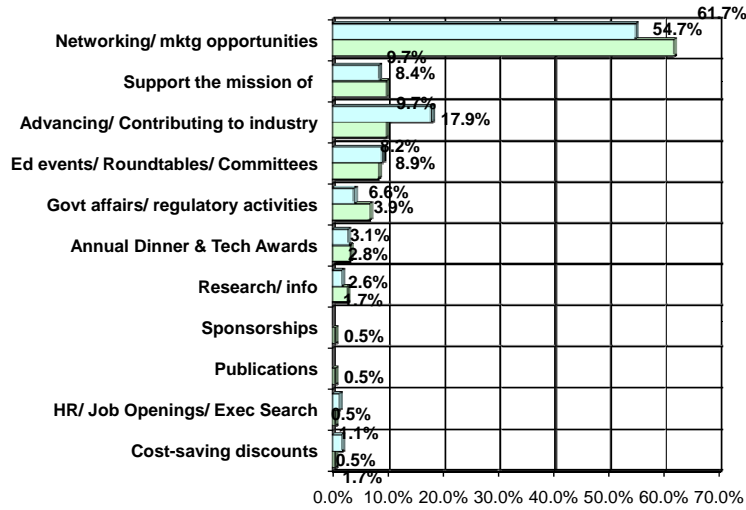
Remarkable Associations

- Do homework—surveys, assessments, and evaluations—before launching or discontinuing a product or service
- Remain attuned to the external environment, particularly the competition
- Talk with members

Good Associations

- Rely more on intuition, assumptions, and chance to guide product development and improvement
- Do not engage in scanning the external environment; often rely on organizational leaders for a view of the world
- Talk to members

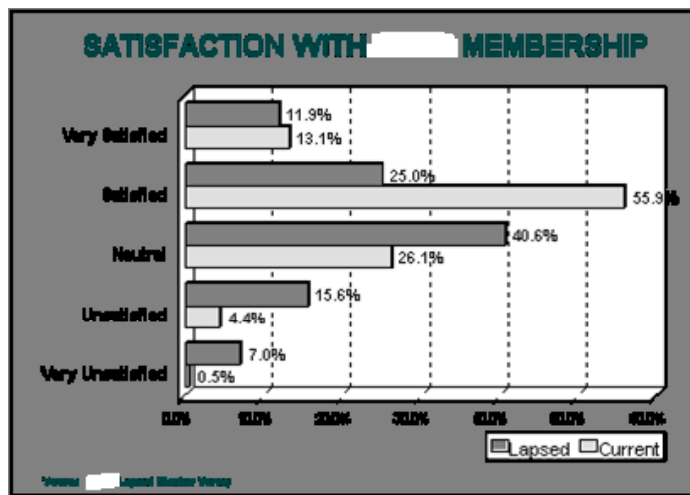
Primary Reason Joined & Primary Reason Remain Member



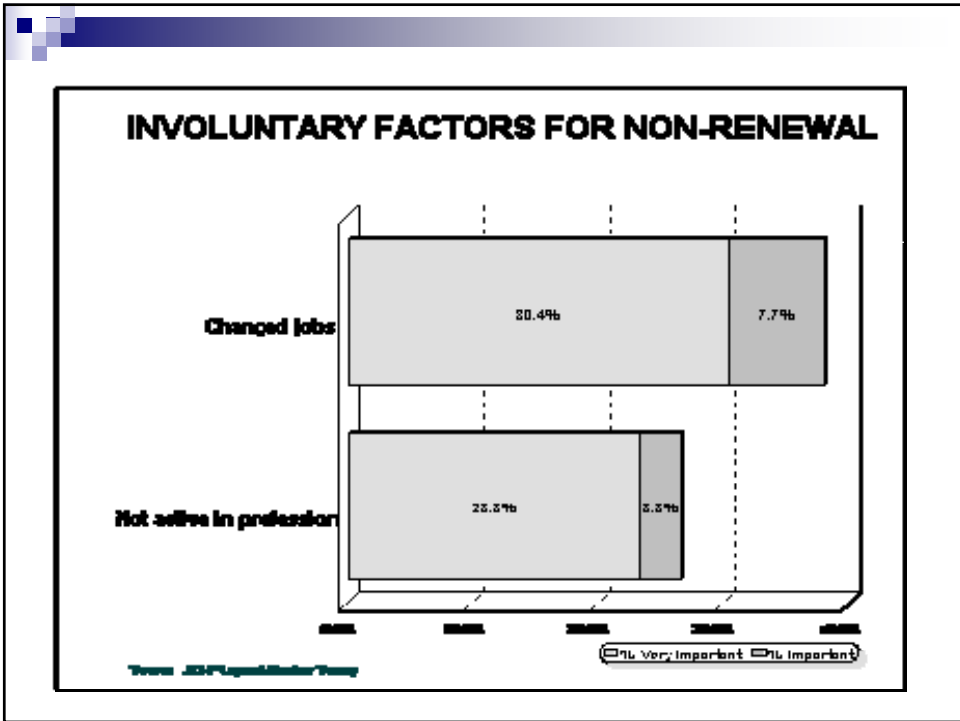
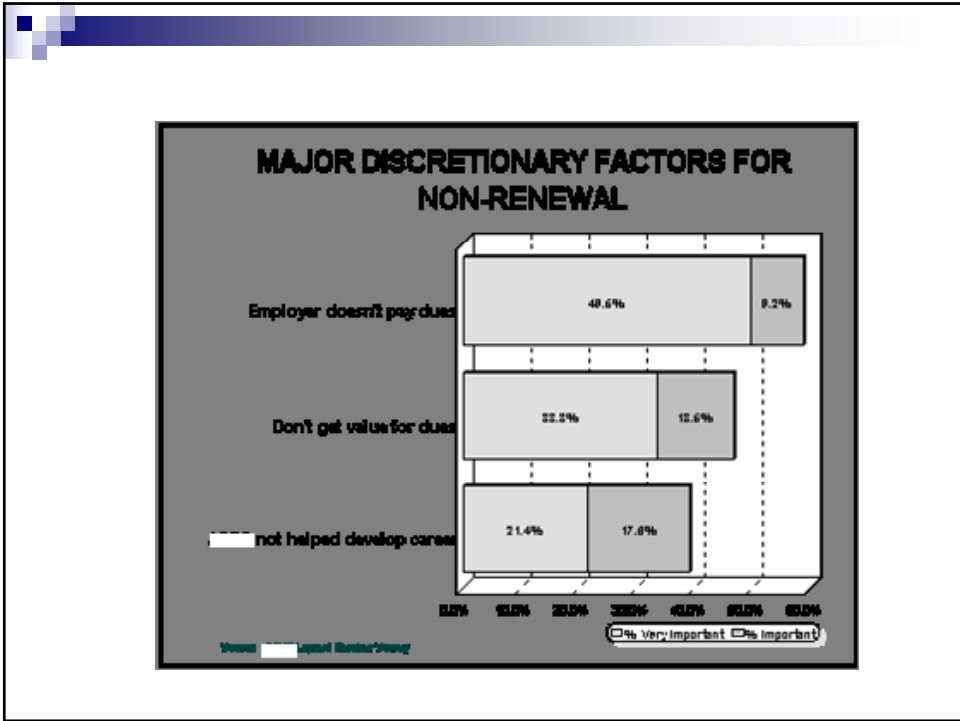
Source: 2007 Membership Survey

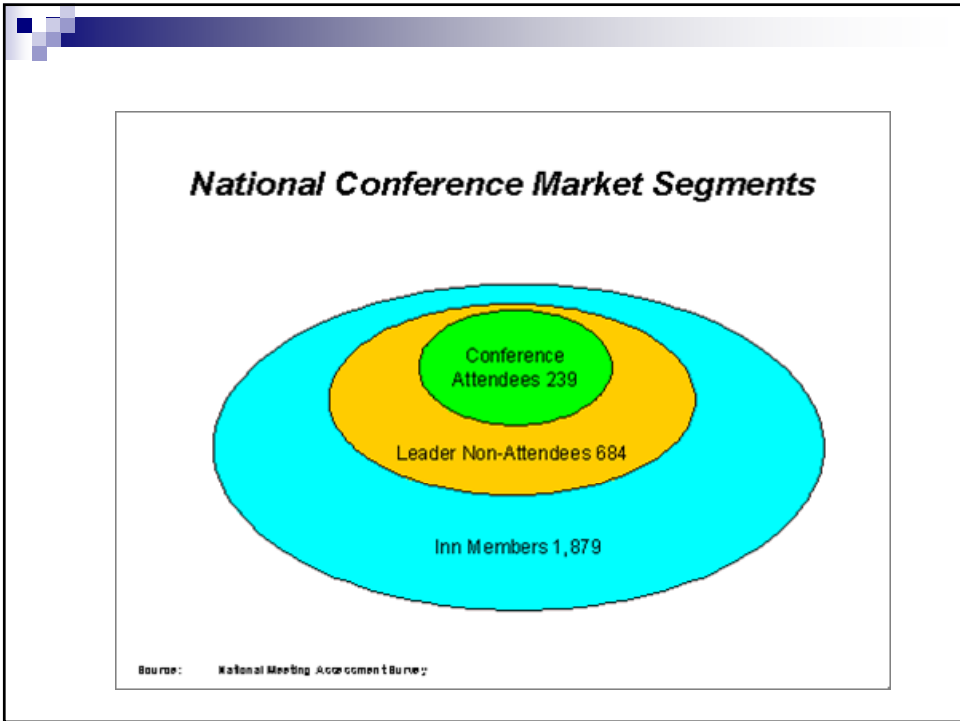
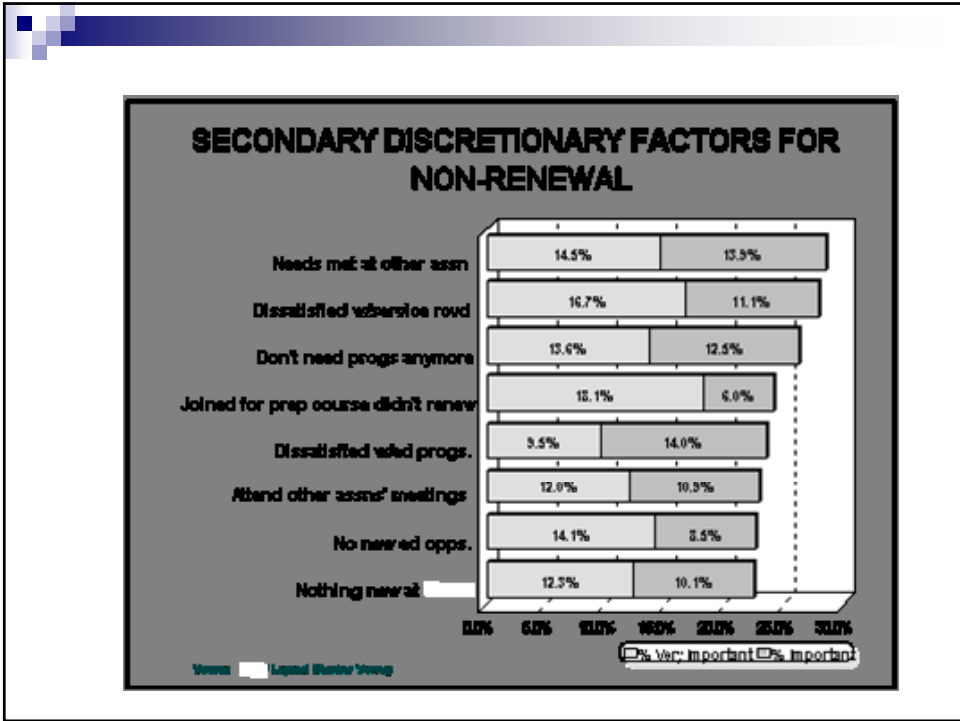
Reason Remain Reason Joined

SATISFACTION WITH MEMBERSHIP

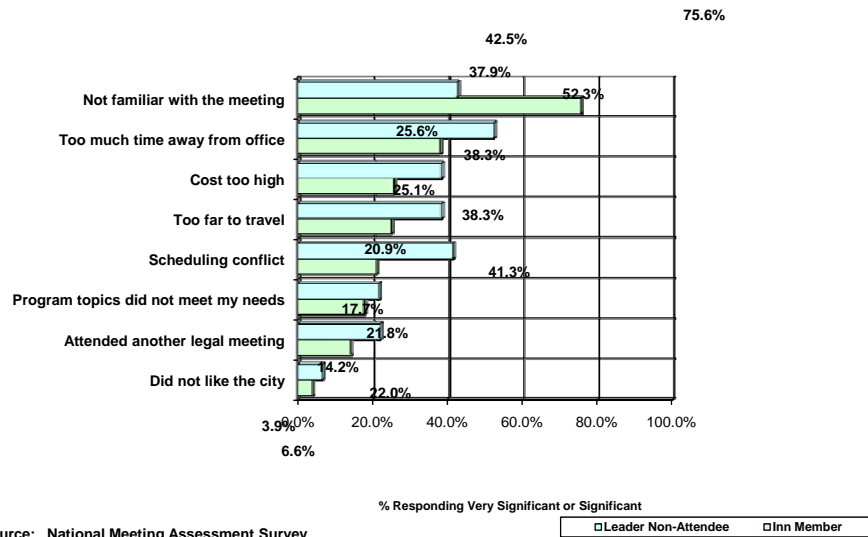


Source: Lapsed Member Survey

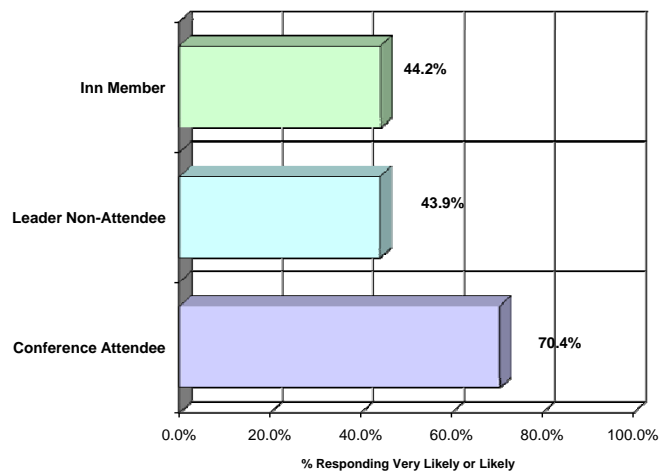




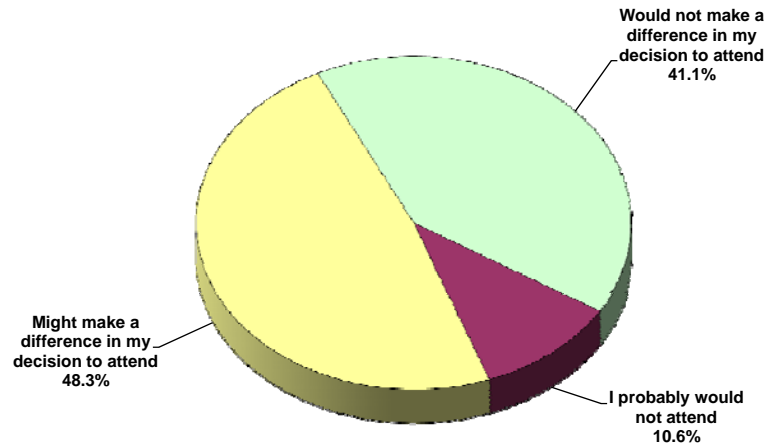
Significance Of Reasons For Not Attending National Leadership Conference In Past 3 Years



Likelihood To Attend A National Meeting With An Interesting and Useful Program



If Registration Fee Were Raised, How Would That Affect Decision To Attend?



Source: National Meeting Assessment Survey

Interest in Future Leadership Conference

This survey is designed to measure your interest in participating in an annual National Leadership Conference is considering beginning in 2009. Please review the description of the conference, noting the different elements of the proposed conference format, such as time away from your office, travel, registration and hotel expenses, and the program. Then please answer the subsequent questions about your interest and your suggestions.

HYPOTHETICAL CONFERENCE DESCRIPTION

The conference will be held on a Friday and Saturday in mid-June at a resort destination in Orlando, Florida. Conference registration will be \$595 per person, which includes approximately 5 hours of CLE credit, continental breakfast and lunch on both conference days. An optional dinner event will be held, which will cost \$95 per person.

Hotel room rates will be approximately \$225 per night. The special group rate will be available for several days before and after the conference for attendees who are interested in extending their stay

Hypothetical Conference Agenda

Day 1

8:30 a.m. Welcome
 9:00 a.m. Plenary Session
 Panel Discussion I

 10:30 a.m. Panel Discussion II

 12:00 p.m. Lunch with Keynote Speech

 1:30 p.m. Breakout Session I
 Topic 1
 Topic 2
 Topic 3

 3:00 p.m. Breakout Session II
 Topic 1
 Topic 2
 Topic 3

 6:00 p.m. Reception and Dinner with Featured Speaker

Day 2

8:30 a.m. Plenary Session

 10:00 a.m. Workshop Session 1

 12:00 p.m. Lunch with Guest Speaker

 1:30 p.m. Workshop Session 2

 3:00 p.m. Conference concludes

Q6a How likely are you to attend the National Leadership Conference described?

		How likely are you to attend the National Leadership Conference described?				
		Very likely	Likely	Undecided	Probably not	Definitely not
All Respondents	_____	6.6%	16.9%	35.6%	32.7%	8.1%
Leadership Position	Local Inn President	11.4%	25.2%	35.8%	25.2%	2.4%
	Secretary/Treasurer	4.0%	19.8%	40.6%	29.7%	5.9%
	Administrator	11.9%	21.4%	31.0%	31.0%	4.8%
	Committee Chair	11.6%	15.9%	36.2%	26.1%	10.1%
	Other	4.8%	16.1%	33.1%	36.4%	9.6%
Age	Younger than 45	8.3%	17.8%	39.6%	29.0%	5.3%
	45 - 54	7.3%	16.8%	32.3%	37.3%	6.4%
	55 or older	5.3%	16.8%	35.5%	30.9%	11.5%
Gender	Male	6.2%	17.2%	36.2%	31.9%	8.5%
	Female	7.4%	17.3%	34.6%	33.7%	7.0%
Attended National Conference	Yes	13.1%	29.1%	31.2%	22.6%	4.0%
	No	3.8%	11.7%	37.3%	37.3%	9.9%

OFFICIAL CONTRACTOR SERVICES

18. Please evaluate the following services provided by the service contractors at :

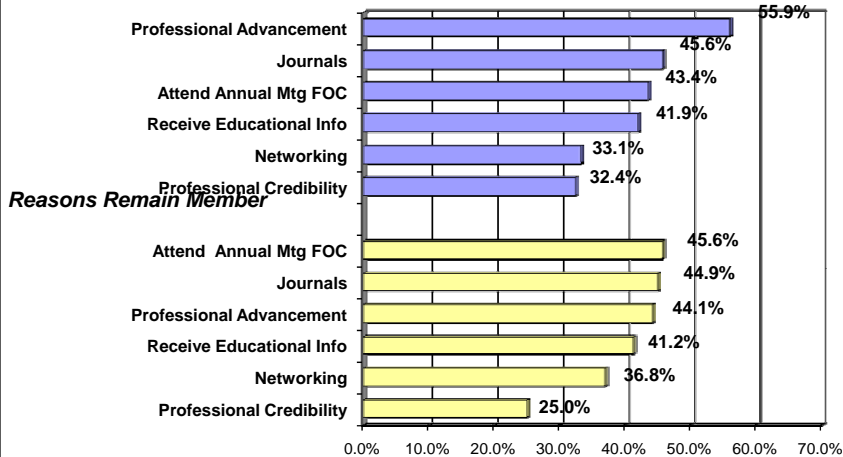
	NOT AWARE OF	AWARE OF BUT DID NOT USE	VERY SATISFACTORY	NEUTRAL	VERY UNSATISFACTORY
EXPOSITION SERVICES					
v. PRE-SHOW:					
ii.					
ii.					
ii.					
x.					
x.					
i.					
ii.					

18a. Please rate Services response/helpfulness with pre-show planning & preparation pre-show

Services	Response/helpfulness with pre-show planning and preparation					
	Very Satisfactory	Satisfactory	Neutral	Unsatisfactory	Very Unsatisfactory	
Products	Machinery	44.1%	36.2%	6.8%	1.1%	.6%
	Supply	36.1%	34.4%	10.0%	1.0%	.7%
	Service	36.8%	36.8%	6.6%	.0%	.0%
Location	Building A-Exhibit Halls	38.7%	36.1%	10.3%	.0%	.6%
	Building A-Level 3	47.1%	35.3%	5.9%	.0%	.0%
	Building A-Level 4	14.3%	57.1%	.0%	.0%	.0%
	Building B-Exhibit Halls	32.6%	37.6%	8.8%	1.7%	1.1%
	Building B-Levels 3,4	36.8%	31.6%	13.2%	2.6%	.0%
	Building C-Exhibit Halls	46.5%	34.3%	5.1%	1.0%	.0%
Previous Shows	One or less	37.9%	38.7%	8.1%	3.2%	.8%
	Two or more	36.9%	36.1%	8.7%	.3%	.5%
Total 2006		37.6%	36.3%	8.6%	1.0%	.6%
Total 2004		36.7%	40.2%	8.5%	2.0%	.6%
Total 2002		28.5%	33.0%	12.9%	1.8%	.6%
Total 2000		31.4%	31.7%	12.4%	1.7%	.9%
Total 1998		28.6%	31.5%	15.3%	1.8%	1.3%

**PRIMARY REASONS JOINED/REMAIN A MEMBER OF
FOR THOSE 40-44 YEARS OF AGE**

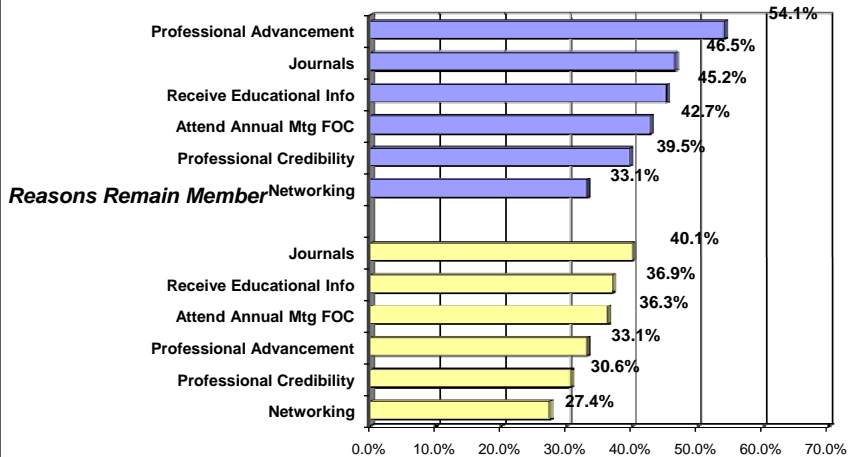
Reasons Join



Source: 2006 Membership Education Needs Assessment

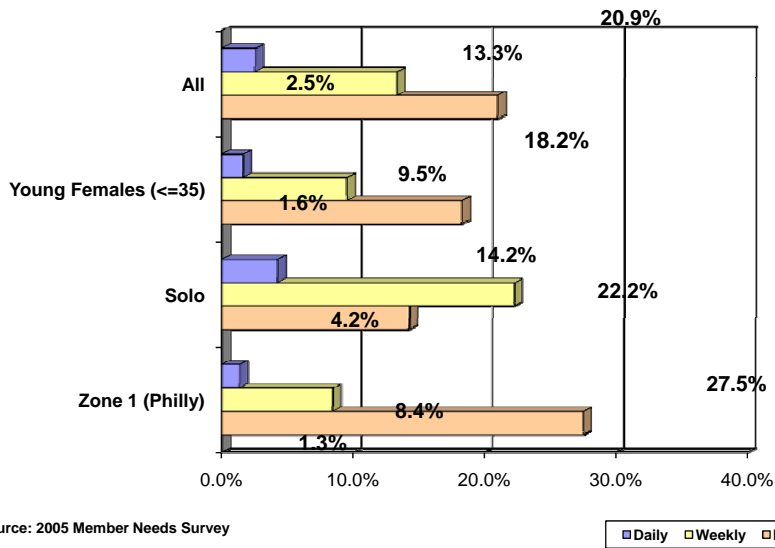
**PRIMARY REASONS JOINED/REMAIN A MEMBER OF
FOR THOSE 45-49 YEARS OF AGE**

Reasons Join

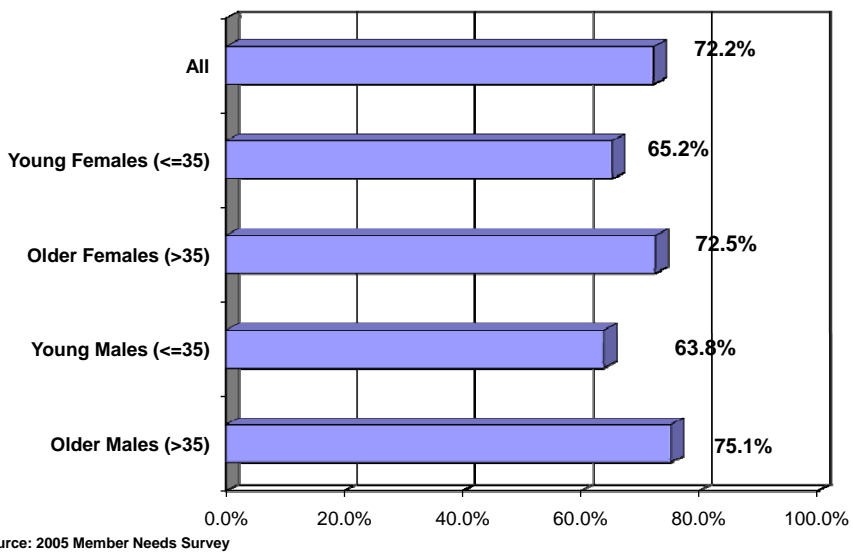


Source: 2006 Membership Education Needs Assessment

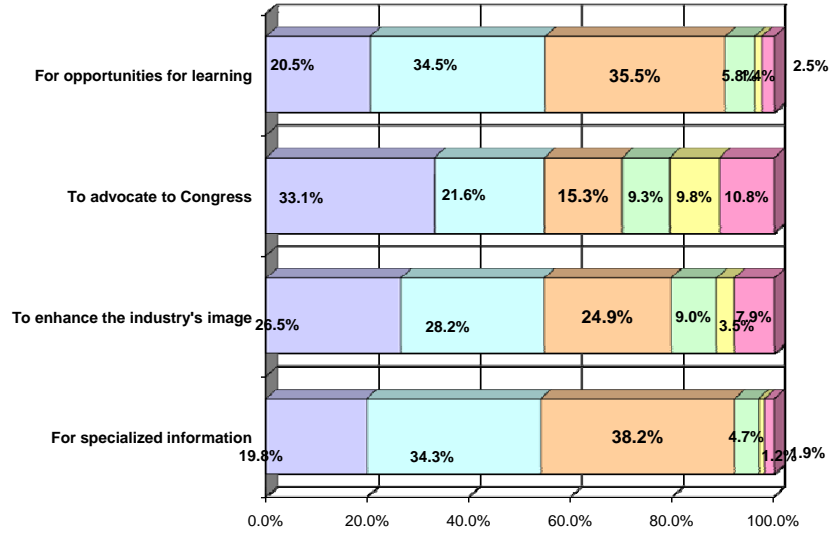
How Often Do You Access the Web Site



Overall, How Satisfied Are You With By Gender (Very Satisfied & Satisfied)



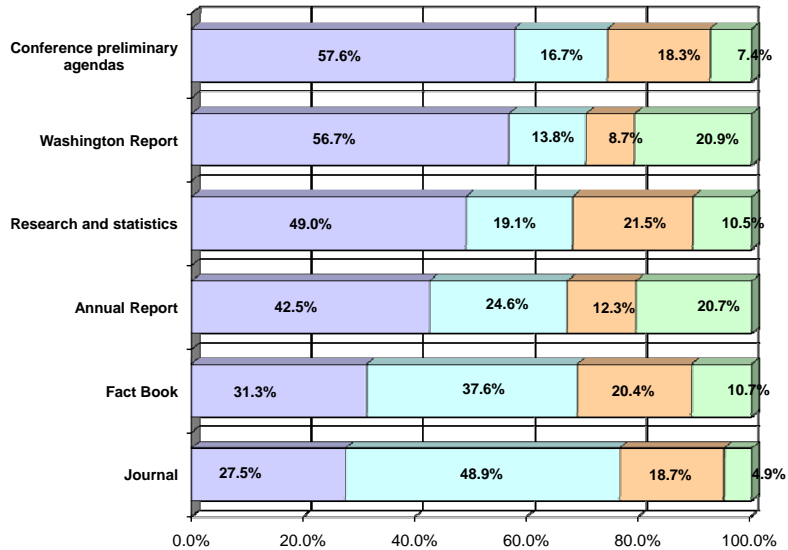
Reasons and Extent Members Look to



Source: 2007 Member Needs Assessment

Always Most of The Time Sometimes Rarely Never No Opinion

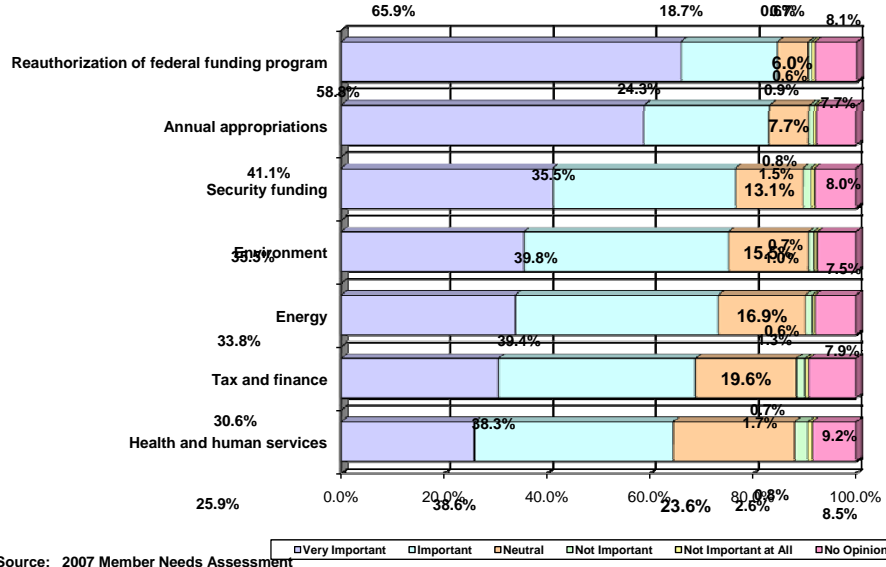
Preferred Format for Publications



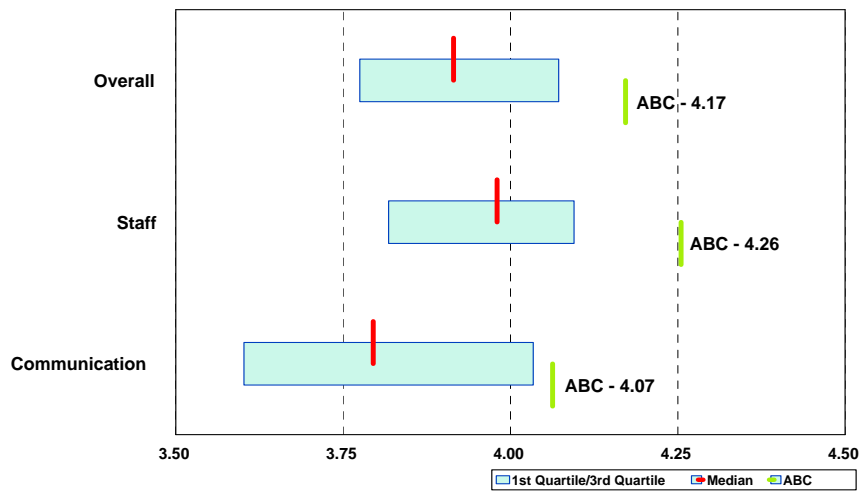
Source: 2007 Member Needs Assessment

Online Print Both Print and Online No Preference

Importance of Legislative Issues



Satisfaction Ratings Compared to Other Associations



5 Point Scale; 5 = Very Satisfied – 1 = Not Satisfied At All

MEMBER SATISFACTION RANKINGS

(Rank out of 18, for 1,833 Respondents)

➤ OEHS CENTRAL	18th
Exceptions	
ABC (434)	16 th
Female (470)	16 th
Younger than 35 (202)	15 th
➤ CONSULTANTS DIRECTORY	17th
Exceptions	
Member ≤ 2 Years (191)	15 th
➤ ONLINE	16th
Exceptions	
Laboratory (52)	13 th
Member ≤ 2 Years (191)	14 th
➤ E-LETTER	15th
Exceptions	
ABC (10,86)	13 th
Member ≤ 2 Years (191)	11 th
➤ VOLUNTEER GROUPS	14th
Exceptions	
Education/Training (115)	9 th
Research (82)	13 th
➤ PR/OPERATION OUTREACH	13th
Exceptions	
PhD/DPH/EDD/ScD (180)	10 th

ALL LEADERS VALUE TO THE PROFESSION

Percent Who Would Eliminate

