Member Engagement Roundtable at ForumCon17

* Philanthropy NY: partnered with Race Forward to look internally
* Racial Learning Cohort drawn from membership to tackle internal DEO practices at their own organization.
  + RaceForward – train the trainers
  + Accountability
* How do you track member engagement?
  + GCIR
    - Membership has increased since election
    - Everyone on staff on a portfolio team to engage with members on a personal level. Where they are at? What they are interested in? Make recommendations
    - Everyone on staff touching the membership
    - Take advantage of staff travel to meet with members in person
* Member Outreach Process
  + Have phone call, and ask them open ended questions
  + One person has relationship with one person at member
  + Challenges, Opportunities, Excitement about xyz…
  + Corporate and Banks are harder to connect with (especially without personal relationship)
  + High touch conversations with influential/involved member about what they want out of their membership
    - Put in Salesforce and look at opportunities in SF that align
    - Staff can see notes on this conversation and keep conversations on that same line so we can report back on the value we are providing
* Organizational vs. Individual goals
  + What do organizations (vs. individual people) want to get out of the membership?
* Can you even try to meet with every member? Depends on the number of members
  + Work with CEO to determine target members who they should meet with
  + Targeted communications
* Track CEO & President changes at membership organizations to make sure you meet with the new CEO
* Engagement score based on listserve replies, event attendance, meetings, etc.
* How do you find success with engagement? Is it the number of engagements?
* Capacity for members to be out of office and attending event
  + Virtual Events?
  + 2 events per staff per year?
* What is driving discussion on engagement?
  + Concern over retention?
  + We want our members to learn stuff?
  + Both, actually.
* Members ask for certain services, resources, but then don’t engage or take advantage
* Who do you concentrate on?
* Putting together organizations’ histories with us (engagement) and can we target members “in danger” of not renewing from that?
* Low engagement but not at risk of not renewing – still happy with minimal engagement. We need to know that (and we love these members!)
* Where can we engage people in more leadership roles? They often bring in other new members.
* Do membership dues inhibit renewals/engagement?
* What % of revenue is from dues? PSO’s are varying their dependence on dues revenue.
* What is the maximum number of members you can sustain?
  + Are you wasting staff energy on organizations who won’t get value?
  + Can you say “no” to people who want to become members?
* What’s your first-year member drop-off rate?
* Engagement not only for member retention but also pushing the sector
* What does it mean to be a member and what do you gain from being a member?
* Community engagement to expand network
* Current members are the ones making the changes
* How do you tap into very engaged members to engage other members who aren’t engaged yet? This works for annual meeting, otherwise this isn’t as effective.
* How do you follow up on this?
* Works