

APPA's Revised Strategic Plan 2020: Building a Robust, Sustainable Business/ Membership Model

By E. Lander Medlin

Membership retention and recruitment (growth) is the foundation, the life blood of an association. It requires a focus on member needs (now and for the future), disciplined execution, and a passion for the work by and between the volunteer leadership and staff—all in support of the profession.

As former hockey great Wayne Gretzky, the NHL's leading point scorer, said when asked about the key to his success: "I don't skate to where the puck is, I skate to where the puck is going to be!" His success wasn't just the result of talent or strength alone; rather, it also came from being able to pick up on visual cues, having an enormous passion for the sport, and possessing the knowledge and experience that helped him anticipate what would happen next. This is instructive when we consider the elements for building a successful association business—hence a truly sustainable membership model.

THE EXCEPTIONAL EXPERIENCE

For example, when individuals think about engagement, they often recall exceptional experiences. In most cases, these experiences occur because they are interacting with an organization that understands their needs on a deeper level; that organization is able to anticipate their needs and provide relevant and meaningful solutions.

APPA's work this past year to gather feedback from focus groups, invest in a general membership survey, and perform an environmental scan of the external drivers of change has provided meaningful data and

information to help us not only respond to change but more important, to anticipate change. The revised *Strategic Plan 2020* strives to more effectively target member's needs today and to tackle the tough issues faced by future generations, and ultimately gain real, meaningful engagement for all over time. Indeed, we endeavor to assist members in staying up to date, saving money, avoiding costs and risk, improving productivity, increasing effectiveness, and advancing the profession—all important, valuable, and worthy membership benefits.

Yet, membership benefits are more than just a transactional exchange of programs, products, and services. Our organization must provide an opportunity for members to build meaningful relationships, support a cause, be stewards of a



reputation, and/or advance the profession, all while tapping into the needs and values of differing generations, exercising leadership, having relevance, and seizing opportunities.

STRATEGIC PLAN 2020

As we begin work on the Strategic Plan 2020, comprising five leading strategies and associated initiatives and actions, it is important that we provide context, meaning, and definitions for a few of the terms used throughout the document.

A new meaning for member engagement, or what is “engagement assessment”?—Engagement represents a relationship with an association that enables the member to do something they want to do in the first place, better than they would be able to do on their own. The association becomes a partner rather than merely a provider of benefits. Members choose to become engaged to achieve outcomes that matter to them. The move is from *participation*, which could be likened to a transaction (a sale, etc.), to a *connection* between what the association does and what is critically important to them. The focus is not selling and persuading; it’s recognizing and fully understanding the potential connection points with members that is at the heart of retention and engagement. This approach elevates *relationships* over the delivery of goods and services.

The association essentially becomes indispensable by building the organization around what matters most to members; hence, a relationship-focused engagement model is formed by:

- Understanding what keeps our members up at night.
- Seeing the work through members’ eyes.
- Providing technology-enabled solutions.
- Creating a “community” culture (one of interactivity, collaboration, and meaningful two-way conversations).
- “Living” in members’ spaces—in their “shoes.”
- Engaging in collaborative development of products and content.

The mindset moves from building an “audience” (one-way, more transactional) to building a community—two-way, highly interactive, participatory, with contributions that are mutually beneficial, where members feel valued and important.

Therefore, we must focus on intentional efforts to build long-term relationships, to foster a program that enhances ways to feel connected, to share opinions, experiences, and knowledge, and to use and provide searchable resources—relevant, archived information that will help members to find the solutions they need.

In order to know who the most engaged members are, we need to be able to properly “score” or measure member engagement. Scoring engagement in an association helps gauge the degree to which members are actively involved and aligned with organizational goals. Engagement measurement tools should provide the association with information to understand more about our members and when those relationships might need nurturing or enrichment.

THERMAL ENERGY STORAGE

DO YOU HAVE ALL THE BASES COVERED?

NORTHWEST VISTA

PALO ALTO

NORTHEAST LAKEVIEW

DN TANKS

Pictured on the bases are the three TES tanks built recently for Alamo Community Colleges District in San Antonio, TX.

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The association management system (AMS) database we are in the midst of implementing should be well equipped to provide robust insight into just how an association functions and the value it creates for its members. For example, a simple measure called the “Net Promoter Score” (NPS) could be employed for that type of immediate, measurable, and meaningful feedback.

The essence of the NPS is captured in one very important question: *How likely are you to recommend the organization, program, or product to someone else?* Therefore, the focus is on creating highly meaningful and exclusive experiences that will generate “off the charts” Net Promoter Scores.

Onboarding new members—The Wikipedia definition suggests that onboarding is a process of “organizational socialization”: It essentially means welcoming a newly recruited member into a new member community. Therefore, a *welcoming on-boarding process* should be in place, whether it includes an e-mail and a call, followed by a mailed package or an online package (webinar, video, podcast, flip book, etc.). However, it is also about creating a welcoming community that is personalized (e.g., a buddy system, mentoring program) so that more active members or volunteers reach out to and connect with the new folks and show them the ropes, explaining and offering personal examples of how they have benefited from being active members. In short, they need to know the WIIFMs (What’s In It For Me?).

Effective onboarding treats the new member as a *member first* and a *customer second*. The key to effective onboarding is first to identify the member’s motivation for joining, along with their needs, interests, and communication preference(s). The next step is to send targeted communications based on that information in order to move them into the appropriate engagement cycle.

Good onboarding involves a mix of selling, educating, and using products with minimal friction along the way. It also involves reminding new members about the impact of specific benefits or opportunities, showing them how to get started, and identifying and removing barriers. In other words, communicate, communicate, and communicate again.

Experiential learning methodologies—It is necessary to first define experiential learning:

“In its simplest form, experiential learning means learning from experience or learning by doing. Experiential education first immerses learners in an experience and then encourages reflection about the experience to develop new skills, new attitudes, or new ways of thinking.” (Linda H. Lewis and Carol J. Williams, “Experiential Learning Past and Present,” *New Directions for Adult and Continuing Education* 62, Summer 1994, p. 5).

The experiential learning methodology is not linear, cyclical, or even patterned. It is a series of working principles, all of which are equally important or must be present to varying degrees at some time during experiential learning. To that end, this list of characteristics should be present in order to define an activity or method as experiential. These characteristics include:

- A balanced mixture of content and process
- Absence of excessive judgment; a safe space to process self-discovery
- Engagement in purposeful endeavors; activities that are personally relevant
- Encouraging the big picture perspective; seeing relationships in complex systems and finding a way to work within them
- The role of reflection; bringing “theory to life”
- Creating an emotional investment; the learner must be fully immersed in the experience
- The reexamination of values
- The presence of meaningful relationships
- Learning outside one’s perceived comfort zone; being accountable for one’s actions and owning the consequences

Chapman, S., P. McPhee, and B. Proudman (1995). What is Experiential Education? In Warren, K. (Ed.), *The Theory of Experiential Education* (pp. 235-248). Dubuque, Iowa: Kendall/Hunt Publishing Company.

In essence, experiential learning has a quality of personal involvement, the whole person in both his or her feeling and cognitive aspects being part of the learning event. Furthermore, experiential learning exists when a personally responsible participant cognitively, affectively, and behaviorally processes knowledge, skills, and/or attitudes in a learning situation characterized by a high level of active involvement.

Experiential learning is participative, interactive, and applied. It allows contact with the environment and exposure to processes that are highly variable and uncertain. It involves the whole person; learning takes place in the affective and behavioral dimensions as well as in the cognitive dimension.

The experience needs to be structured to some degree—relevant learning objectives need to be specified and the conduct of the experience needs to be monitored. Participants need to evaluate the experience in light of theory and in light of their own feelings. And, process feedback needs to be provided to the participant to complement (and possibly supersede) the outcome feedback received by the participant.

THE PATH TOWARD IMPLEMENTATION

The terms and associated definitions provided above serve to further clarify and contextualize

their use in APPA's newly revised Strategic Plan 2020, as there are or certainly could be many varied viewpoints and perspectives.

Lack of clarity and general agreement at this critical juncture would only impede our progress down the path toward implementation rather than provide the opportunity to rapidly advance it. This clarification ultimately provides the focus for disciplined execution and achievement of our goals and objectives. Certainly this will be challenging, but we look forward to that challenge as we enter APPA's next 100 years. ☺

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