The Monthly idea source for those who recruit, manage and serve members

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MARKETING APPROACHES

Sell Your Association, Events Through Content Marketing

By Kim Pawlak

No matter which industry your association serves, your members are looking for a trusted expert, so you need to explain, show and give proof that that's what you are, says Lori Gracey, executive director of the Texas Computer Education Association (TCEA; Austin, TX).

"What this means it that when you're sending out a marketing email, for example, it has to contain content that matters to them; otherwise they're not going to pay attention," she says. "To do that, you need to know your members' pain points and what they want specifically so that a piece of that goes into every single marketing piece you send out."

TCEA works with educators who are trying to use technology to help kids learn, says Gracey, but within that overarching group are elementary teachers, secondary teachers, principals, chief technology officers, librarians and others. "What a chief technology officer and a librarian need are different, so we had to break down exactly what content each group needs," she says. "We look at that every year through the use of focus groups, surveys and data about what members are interested in."

She recommends sitting down with your staff and board and really focusing in on what members need, what keeps them awake at

night, what's causing them pain, what their questions are and what their hot topics are. Once you've identified that, you can use it to develop a content marketing strategy tailored to their needs. The calendar has to include the content you're going to provide for each member segment, she says, and has to be planned out, or it's all just random stuff you're throwing at them, which in the end doesn't do you any good.

She also recommends developing a marketing mission statement for each project, tailored to each audience, that serves as a guide as you plan your content marketing strategy: "A content marketing mission statement talks about the purpose behind every single piece of content you're going to send each week, month, guarter, etc., and the core audience that you're trying to reach with each. For example, 'The content that we are going to produce helps us attract convention registrants by providing current and engaging content that makes our librarians feel like they are in control so that they can better serve their students."

Source: Lori Gracey, CAE, Executive Director, Texas Computer Education Association, Austin, TX. Phone (512) 450-5400. Email: lgracey@tcea.org. Website: https:// tcea.org/

CONFERENCE CALL FOR PROPOSALS

Advice for Getting Better Presenter Headshots

If you're tired of receiving grainy and unprofessional presenter headshots in your annual conference session proposals, try providing some helpful tips on what you do expect from submitted photos, such as high definition and business wear, says Megan Brouwer, association manager for Barcami Lane, Inc. (Westford, MA).

If you receive poor photos anyway, she suggests reaching out to say, "'This isn't in line with other headshots that are coming in. Do you have another photo of you without sunglasses or that is more professionally done?' If that doesn't work, you'll have to make a judgement call about not including their photo."

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GROWING YOUR MEMBERSHIP

Use Member Benefits To Recruit, Retain

Most members do not join for the value of membership, says Timothy McNichols, executive director of partnerships for LIG Solutions (Independence, OH), but they do stay for the value.

"Have member benefits as well as unique or exclusive products and services that your members cannot get somewhere else," he says. LIG has a unique member benefit solution called the LIG Association Health Program built around offering health coverage options to association members and staff. Their insurance coverage is dependent on maintaining their membership.

Member benefits cannot be a "cookie-cutter" approach, says McNichols. They need to be built for your own unique audience and identify what makes you stand out. He recommends asking some questions as you do that:

- Is this something that is exclusive to the members?
- · Can they easily get the same thing somewhere else?
- Does it bring value to the membership and the organization?
- Is this something that is just an item on a list?

How do you know what members need or want? "That's simple — you ask," he says. "Do surveys and talk to your members at in-person events or road shows. Members don't know what they don't know, and they don't know until you ask. Use a combination of open-ended questions to get ideas and specific questions to gauge if something is needed or of interest. Many times, that one thing a member asks for could be a benefit that is needed across the whole organization or maybe just a small group, but it is still a need that can further your value proposition." ◆

Source: Timothy McNichols, Executive Director of Partnerships, LIG Solutions, Independence, OH. Phone (216) 487-6152. Email: TMcNichols@ligsolutions.com. Website: https://ligmembers.com

TEST ONE-TIME MEMBER DUES

Consider a Special Rate Tied to Your Milestone

The Owner-Operator Independent Drivers Association (OOIDA) was looking for a hook to engage its small-business trucker members in the association's 50th anniversary year. It decided that, for all of 2023, it will offer new or renewed memberships at a reduced two-year rate of \$50, a \$40 savings over the two-year period.

"Like almost all associations, one of our biggest challenges has been to get members to renew beyond their initial membership year," says Michael Schermoly, OOIDA's marketing director. The discounted "two for 50" rate requires individuals to commit to the two-year membership. Truckers can join by phone, online or at trade shows.

In the first month since its January 1 launch, the campaign has led to 80 percent of new and renewal applicants choosing the two-year option. "All of our online applications were modified to make the top two default selections two years for \$50 and four years for \$100," Schermoly says.

Source: Michael Schermoly, Marketing Director, Owner-Operator Independent Drivers Association, Grain Valley, MO. Phone (800) 444-5791. Email: press@ooida.com. Website: https://www.ooida.com

FACILITATION BEST PRACTICES

The Art and Science of Facilitation

Not many associations spend time training on facilitation, and, as a result, effective facilitation often gets lost in the process of other tasks, such as creating an agenda and designing the meeting, say Brian Riggs, CEO of Enterprise Corporation (Mullica Hill, NJ), and Brian Summers, vice president of operations for the Construction Financial Management Association (Princeton, NJ).

"The great misnomer in the industry is the fact that a lot of association staff work in the industry," says Summers. "They know the industry, but they're not in the industry, so they have to lean on volunteers constantly to get direction for the organization to achieve goals and everything else they're trying to do as an association, and facilitation is a big part of that."

Says Riggs: "Association leaders are also being asked to lead among leaders. Most individuals who sit on boards are respective leaders within their own industry or their own space, and facilitation gives an association leader an opportunity to demonstrate a very unique leadership skill set which converts to confidence from volunteer leaders in their association leader."

The two share some facilitation best practices:

- Label your agenda topics either as informational, discussional or decisional so participants come better prepared for the meeting.
- Provide detail on your agenda for how participants should engage with the materials. "For example, you might give

them 40 pages worth of materials but say, 'I want you to take a look at page 1 and 2 and come with some ideas, and then review pages 7 and 8 and be prepared with directional input," says Summers.

- Set clear objectives for what you want out of the engagement. "How will you maximize the time, space and people to create an experience that people walk away from feeling like there was an investment on their part from a time perspective ... and an internal reward?" says Riggs.
- Find a balance between giving them too little information and giving them too much information and making it appear as if you're driving them toward a preconceived conclusion.

When facilitation isn't executed correctly, says Summers, decisions and direction aren't aligned with the association, or, in a more specific example, you let one voice reign above everyone else's, and that might not have been the right direction for the association: "When you don't engage correctly, how motivated will people be to come back and contribute at a high level?"

Sources: Brian Riggs, CEO, Riggs Enterprise Corporation, Mullica Hill, NJ. Phone (856) 816-3928. Email: brian@riggsenterprisecorp.com. Website: https://www.riggsenterprisecorp.com

Brian Summers, CAE, Vice President of Operations, Construction Financial Management Association, Princeton, NJ. Phone (609) 945-2408. Email: <u>bsummers@</u> cfma.org. Website: <u>https://cfma.org/</u>

CHAPTER MANAGEMENT

Planning Adds Value to Chapter Events

Chapter events can be more than strategic planning meetings with a meal. They can be educational opportunities, recruitment tools and a chance for members to reconnect.

To get the most out of your chapter event:

- Build the event around a theme. Identify issues important to chapter members and select the timeliest to integrate into your event's title, such as "First Steps on a New Path," that can generate more focused themes for other activities.
- Host concurrent breakout sessions. Experts within your membership can lead brief workshops on specific topics, allowing participants to attend one or two that can enhance their professional or personal growth in addition to the featured program.
- Recognize distinguished members. Besides honoring key members, award presentations may attract less-active members who want to see the presentation and learn about new directions the chapter is taking, as well as re-engage with their peers.
- Encourage attendees to bring a guest. Ask a dynamic

speaker in your ranks to give a brief overview of rewarding opportunities for new members and new ways for existing members to make fresh contributions to your organization.

- **Reconnect and network.** Start with a continental breakfast that facilitates mingling and end with a social hour or buffet dinner. Encourage exchange of business cards and contact information. Take lots of photos to send or email members or post on your website to let persons who missed it mark their calendars for the next activity.
- Incorporate community outreach. Your chapter can increase awareness of its work by developing unique workshops for the public. For example, an art museum can offer an introductory acrylics or printmaking class and host a showing of the results.
- Bring in guest speakers. Ask members for names of persons with a story to share. Topics may range from talking to aging parents about assisted living to strategies for demanding a pay raise. Your members will enjoy the variety after conducting regular business. ◆

MEMBER RECRUITMENT TIPS

Solicit Irresistible Membership Value Statements

An irresistible membership value statement is one that gets the point across in two or three lines and focuses on what made the difference in the member's life and how it made it better, says Michael Tatonetti, founder and CEO of Pricing for Associations (Atlanta, GA).

"That type of storytelling allows us to connect with current members who may be considering leaving and potential members who are questioning why they should join," he says.

Tatonetti recommends collecting these value statements from your members via annual member surveys or by asking individual questions around specific benefits a couple of times per year, such as, "What difference has being a member made in your professional life? or "What difference has being a member made in your professional outcomes?"

When collecting answers in a survey, indicate you might use their comments for marketing purposes so you can put them on your website and in marketing collateral, he says: "You can also reach out to the best 20 responses and ask them to record a quick 1- to 2-minute video on their phone so you can have those as well as text."

Be sure to ask about the value of both quantitative (being able to save time or have access to resources) and qualitative (how somebody feels about winning an award, the advocacy work you do or access to new job opportunities) benefits so you have a mixture of both or a hybrid, he says.

Tatonetti shares some examples of irresistible membership value statements:

- "When I was tasked with finding an answer to a problem, I was able to turn to the Member Resource portal and quickly find the answer that my boss needed."
- "After 30 years in the field and being a member of this organization for 20 of those years, I was honored to receive a lifetime achievement award recognizing the impact that I had on our industry and those who are going to be coming behind me, and how much more they'll be able to do."

Rather than just listing bullets of benefits — networking, certifications, career board — value statements paint a quick picture of what impact that has so people can put themselves in those shoes and quickly tell themselves a story about the impact it will have on them, he says: "Even if it's not directly for them, it makes them feel good about the organization and the work that you're doing."

Source: Michael Tatonetti, CAE, CPP, Founder and CEO, Pricing for Associations, Atlanta, GA. Email: hello@pricingforassociations.com. Website: https://www.pricingforassociations.com/

SPONSOR SOLICITATION STRATEGIES

'Chamber Champions Campaign' Streamlines Event Support

Rather than soliciting their sponsors for each individual event throughout the year, the Athens Area Chamber of Commerce (Athens, GA) makes a one-time ask each year of 40 to 50 sponsors and allocates the total amount across multiple events, says Chamber President David Bradley.

The chamber launched its Chamber Champion Campaign in 2019 and has grown its total sponsor dollars each year. In 2018, it had about \$95,000 in sponsorships. In 2019, the first year of the Chamber Champions Campaign, it grew to \$125,000. "We are getting ready to close out our program for this year and expect to raise about \$240,000," says Bradley.

The chamber conducts six to eight events each year that have some sort of sponsorship component to them. "The value of this program is that we know in January if our events are going to meet our budgetary needs," he says.

The campaign offers three sponsorship levels. Sponsors at the top three levels will be recognized at some degree at every event held that year. At the bottom two levels, they receive less sponsorship and engagement. Their pitch consists of three significant components, says Bradley:

- 1. We're going to come to you one time a year. "They know what they're expending, and they know what to expect in return."
- 2. We promote our Chamber Champions everywhere. "They are on the front page of our website and on banners as people walk in the door to our office. When we are at any event, they're getting recognition that they wouldn't even remotely get if they had just sponsored one event."
- 3. They receive concierge service. "We are in touch with them every time we have an event. I typically take the top 10 premier sponsors and call or email them a couple weeks in advance to tell them how many tables they have and to ask for the names of those who will be attending. At least once a month they're getting a telephone call or an email from the concierge of the chamber." ◆

Source: David Bradley, Chamber President, Athens Area Chamber of Commerce, Athens, GA. Phone (704) 253-3128. Email: David.bradley@athensga.com. Website: https://www.athensga.com/

Engagement Study Examines How to Connect With New Members

By Linda S. Garrison

A happy member is an engaged member, and member onboarding is becoming more focused on responsiveness, connection and personalization. That's one of the key takeaways from a free downloadable New Member Engagement Study conducted in partnership with Dynamic Benchmarking and Amanda Lea Kaiser.

Leaders of 307 associations submitted their onboarding data to the benchmarking survey during spring 2022. The findings should be of interest to managers of membership organizations, especially those concerned about new member engagement (or the lack thereof).

Three pillars of effective new member engagement remain the same as they were in the inaugural 2018 edition:

- 1. Keep your content fresh.
- 2. Start slow.
- Use three to five tactics, including email, virtual orientations and more.

Easy, right? Not so much for very busy association executives. But the best way to improve membership engagement is to engage new members of your association right away.

One of the questions the 307 association leaders were asked was: "What worries you most?" A surprising 71 percent expressed concern that new members weren't taking advantage of their association's benefits.

The study also found that more than 40 percent of membership associations only budget \$1,000 or less on new member engagement. Why? Because these programs use all of the platforms the organization already has. Think of email, online communications and phone calls. Physical welcome packets are expensive and nonsustainable. Many associations are phasing them out in favor of online versions.

These inexpensive tactics work. In 2022, the three most leveraged/used tactics were email (98 percent), phone calls (48 percent) and online communities (42 percent).

Kaiser offers some of her additional findings:

"Most members of associations join because someone recommended they do so. Word of mouth means they don't understand what the association is about," she says.

Kaiser also advises associations don't dump a ton of information on their new members immediately. This can actually backfire. Too much information is confusing. The new member won't know where to start, becoming disoriented rather than more engaged.

"I'd love to see everyone use virtual orientation meetings," she adds. "COVID really did teach the world how to do things online."

So how can the new member's journey be smoothed out? Kaiser just released a new book, *Elevating Engagement*, based on 477 deep-dive interviews with association members. She found that while members talk about experiences and emotions, associations tend to focus on metrics, KPIs and processes.

If you want to improve your association's engagement with new members, download the study, and if your association wants to become more member-focused, Kaiser's new book is also recommended reading. ◆

Source: Amanda Lea Kaiser, Author and Speaker. Website: https://www. amandaleakaiser.com

PRICING STRATEGIES

Should You Bundle Membership and Event Registration?

There is never a one-size-fits-all answer to bundling membership with an event, but there are several reasons associations might want to include bundling as a consideration in their event pricing strategy, says Christine Saunders, president at Halmyre (Toronto, Ontario, Canada).

Those reasons include:

- You can get paid up front, so you have the cash.
- You have greater (not perfect) certainty of attendance.
- It increases perceptions of value, especially if you can provide an early-bird pricing advantage in the bundle.

• It saves your organization from extra acquisition work on each individual item.

"You must be careful, however, not to reduce the perceived value of your programs," she says. "One of the key drivers of any pricing work we do is to ensure you have a clear-eyed understanding of the fully loaded cost to the association of such programs like events."

Source: Christine Saunders, President, Halmyre, Toronto, Ontario, Canada. Phone (866) 425-6973. Email: csaunders@halmyre.com. Website: https://halmyre.com/

ETHICS ISSUES

Ethical Dilemmas That Impact Membership

The three most common ethical situations membership associations will face involve interactions between members, interactions between the association and a member and association to external organization or company interactions, says Taylor Jackson, CEO of the Home Builders Association of Greater Austin (Austin, TX).

"Ethics isn't always black and white," she says. "There is definitely some gray area, and organizations have to be comfortable with that gray area."

An example of an ethical situation between members might involve slander or incorrect information one member is saying about another member at an association event or on social media, she says: "When that happens, your association would more than likely serve as a mediator, reviewing your code of ethics to see if your members are abiding by it."

Ethical situations involving an association and a member can be subtle, says Jackson, and often an area where consistency is key: "For example, you have a long-time member who wants to get an early copy of the sponsorship prospectus for the new year before its official launch date. The ethical question becomes, 'Do you send that long-time member the sponsorships before everybody else is allowed to see it? Does that give them an unfair advantage?' In that situation, it's important to ensure that the association is consistent and not providing an unfair advantage for one member over another."

One of the most common ethical situations that can occur between your association and another external association, organization or company involves outsourcing and conflicts of interest, she says.

Having a process in place to review ethical issues when they arise is important because when they do arise, it is usually unplanned, says Jackson: "Having a process in place ahead of time will drastically save you time, give you clarity and direction, provide you with a starting point for working through that issue and provide consistency in how you deal with specific ethical issues."

That process will vary based on your association and individual ethical situation, she says, but the most common is the logic model, which identifies what the problem is, who the internal and external stakeholders are and outcome and impact of various decisions: "It systematically puts down on pen and paper what the problem is, who it's going to impact and how it may impact the organization and the people involved with the ethical situation." •

Source: Taylor Jackson, CAE, MPA, CEO, Home Builders Association of Greater Austin, Austin, TX. Phone (512) 982-9184. Email: Taylor@hbaaustin.com. Website: https://www.hbaaustin.com/

SEEK MEMBER INPUT

Let Members Help Write Your Promotional Materials

Ever get writer's block when it's time to write a recruitment brochure or other promotional material? Look to your members for assistance.

Meet with a handful of dedicated members. Ask why they are committed. List specific reasons for their participation in your organization. Their perceptions will, no doubt, provide you with the raw material you seek. Their ability to look from the outside in can identify the ways in which your organization is meeting their wants and needs.

Listen carefully to what they say. Their natural responses to your questions may provide key words or phrases that bring new vitality to your marketing pieces.

In addition to providing you with compelling messages, this effort will strengthen your relationship with the persons involved, making them even more committed members.

ANALYZING MEMBER ROI

Conduct a Review of Member Benefits

Many associations get so caught up in adding new member benefits they sometimes don't do a good job of evaluating their current ones, says Denise Calabrese, owner of Calabrese Management (Harrisburg, PA).

"It's okay to give yourself permission as an association and a board to admit that a particular benefit isn't working anymore," she says. "Evaluating a program considered a member benefit to tweak it or discontinuing it altogether is not a failure." During the evaluation process, says Calabrese, survey both members who are using your benefits and those who aren't, asking those who are what they are finding valuable and those who aren't why they aren't using them and what they aren't finding valuable, so you know what to change. It could be as simple as the marketing approach for that program isn't working or your members simply aren't aware of the benefit. It might also be that benefit has "seen its day" and it is time to move on to something different. ◆

ACTIONS WORTH DOING

Raise Your Profile Through Polling

By Gary Enos

Conducting public opinion polls on timely topics can elevate an association's profile and instill pride in its members when the results end up receiving national buzz. A year and a half ago, the American Psychiatric Association (APA) began to experiment with monthly polling (bit.ly/3JT6Uop) in addition to an annual survey it had traditionally sponsored.

"We decided to amp things up and create polls that were more theme-oriented," says Bob Ensinger, APA's chief of communications. "It offers a public education perspective and a great way to make news in mental health. It showcases the APA as a leader on a particular topic," a critical aim in the presence of so many voices in the health care community.

Content leaders at the APA meet regularly with Morning Consult, the organization that conducts the association's polls. The two groups' respective expertise results in carefully worded questions for a monthly online poll of 2,000 adults on topics in mental health.

Poll results are shared through news releases produced in English and Spanish and via social media. Ensinger says the process benefits members in identifying the issues of greatest concern to the populations they serve. Also, "There is pride in seeing your organization named on *ABC News* or in The Washington Post," he says. The APA sees the frequency of the Healthy Minds monthly surveys as crucial to keeping its name, and issues of national importance, in the forefront.

Ensinger offers this advice to associations looking into conducting regular polling:

- Find a reputable polling company. "They get to understand you, and you get to understand them," he says. "Then they're not coming at this cold, because they've worked with you."
- Conduct polls on a regular basis. This will allow the organization to track trends over time. That often can help measure how members' everyday work in their field is benefitting communities.
- Be creative with it. "Have fun, so that it will resonate with the public," Ensinger says. One of the APA's most attention-getting polls is its end-of-year survey tied to the public's mental health goals for the new year. The latest version revealed that more than one in three respondents were making a New Year's resolution to visit a therapist in 2023. ◆

Source: Bob Ensinger, Chief of Communications, American Psychiatric Association, Washington, DC. Phone (202) 559-3900. Email: press@psych.org. Website: https://www.psych.org

Five Recruitment Strategies

Here are five ways to increase your organization's membership by a hefty percentage:

- Host a series of receptions, programs or tours targeted to individual businesses and their employees.
- Convince a foundation, business or individual to sponsor a "50 percent off" introductory membership offer, paying half of newcomers' annual dues.
- Coordinate a "Kids Campaign." Children of members who recruit other kids (or families) get prizes.
- Coordinate a series of one-day membership campaigns targeting unique groups — left-handers, twins, vegetarians, the clergy and more.
- 5. Create a one-time reciprocal agree-

ment with another organization: "Your members will be entitled to full membership in our organization for three months if ours are entitled to the same with your organization."

BRIEFS

Be Accessible After Hours

When persons call your office after hours, what message do they receive?

Any phone call by a member (or potential member) to a closed office is almost a warning to the caller: "Call me at my convenience, not yours."

During evenings and weekends, use an answering service or taped message to assist with inquiries.

Depending on the nature of your membership organization and the timeliness of your member needs, you may even wish to include an alternative phone number or instructions. For example, you may wish to share weekend/evening response duties with co-workers, alternating which person's home and cell phone numbers to offer to callers to get immediate assistance outside of your regular office hours. ◆

Member Complaint Advice

 Recognize that a member complaint may mean the individual's expectations with regard to member benefits are not being met. Listening to a member's complaints teaches you what he or she expects from an organization and is not getting from it. This knowledge, in turn, can help you to adjust your membership program to better serve particular members, as well as your membership base as a whole.

USEFUL MANAGEMENT TECHNIQUES

Tips for Conducting Difficult Conversations

Difficult conversations are, unfortunately, a reality for membership organizations. Perhaps it's a low-performing member or board member. Maybe a staff member has said something inappropriate to a colleague. Maybe you're facing a challenge engaging Millennials and Gen Z.

Speaker, Author, and Leadership Coach Diane Darling offers some useful advice. Darling says the current difficult conversation within associations worldwide is this: "What is the value your organization is adding?"

An outcome of this particular difficult discussion has led to consolidation of some groups, such as chambers of commerce. For instance, after several years of talks, the Clearwater Regional Chamber agreed to merge with the Clearwater Beach Chamber in Florida. Another difficult conversation is about the need to truly appreciate the diversity of thought by age, generation and ethnicity.

"Look at diversity the way you look at your investment portfolio," Darling suggests.

What happens if you witness something that needs to be talked about but colleagues don't think it's necessary? Darling says this can be corrosive for both staff and the membership. A difficult conversation often happens when people have avoided a general conversation. Things can escalate.

"A difficult conversation is on the path to a confrontation," Darling notes. "It can derail something that could get ugly."

Source: Diane Darling, Speaker, Author, and Leadership Coach, Boston, MA. Website: https://diane-darling.super.site/

GETTING NEW PROGRAMS, PROJECTS UP AND RUNNING

Ensure That New Projects Are a Smashing Success

If you're just getting a new membership program under way, it's important to get it off to a winning start. Your members should have ownership in establishing new programs.

To build enthusiasm and momentum, participating members need to realize a sense of accomplishment. Anything less will have negative consequences.

Don't bite off more than you can chew. Pursue only one new project or program at a time.

To involve members in getting your program up and running, follow these steps:

 Enlist a small number of persons who have a past track record of success and can bring expertise to the program on which you are working.

- 2. Work with them to select a clearly defined project they can successfully complete.
- Recognize that implementing a new program will require more supervisory time.
- 4. Help participants see the big picture as well as the project's important details.
- Celebrate your accomplishments and recognize those who made it happen.
- 6. Use the project's success to attract additional members.

Once your members have had multiple successes in establishing new programs, enthusiasm will grow, as will the number of those wanting to join your organization. ◆

TAP MEMBER CREATIVITY

Engage Members in Competition To 'Name That Category!'

Thinking of renaming membership categories? Ask your members for creative ideas.

Rather than using standard category titles such as "student," "individual" or "family," reach out to your members to come up with a list of ideas. Have members vote on a list of possible category names created by your staff or ask for unique submissions.

If you ask members for original ideas, consider establishing guidelines to ensure suggestions are suitable. For example, if your organization deals with wildlife, you might encourage members to submit names of animals for consideration.

To generate buzz, coordinate the category-naming contest with a membership recruitment campaign. Offer the members who pick the winning names a discount off their membership or some other prize for participating. In addition, be sure to publicize the new category names to all current and prospective members on your mailing lists.