

Steal This Idea! Innovations in Cause-Oriented Fundraising for Associations

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Associations Don't Always Have All the Answers: Identifying Blind Spots

About a decade ago, Elizabeth had the opportunity to work, briefly, for a consulting company whose clients were primarily drawn from the fundraising and charitable side of the tax-exempt organization world. She had a lot to learn about that industry, and she was able to share some insights from the association industry with her employers.

Her new bosses marveled at the level of cooperation and information sharing in the association community. As she pointed out, association executives can afford to be open with each other, because they mostly don't compete with each other, at least not directly. The overlap in audiences between the American Nurses Association, the American Society of Civil Engineers, the American Institute of Architects, and the American Council on the Teaching of Foreign Languages is effectively zero. That allows association professionals to freely share good practices in areas like recruitment, retention, conference marketing, new program development, and social media engagement at no risk to membership counts or bottom lines.

The fundraising world, on the other hand, operates from more of a scarcity mindset. A set number of people will give a set number of dollars in any given year, so if your charity gets a larger slice of that donor pie, mine will almost certainly be smaller. Hence, competition, rather than cooperation, is the norm.

However, Elizabeth quickly noticed some areas where charities far outperformed what she'd observed in associations in her then ten years in the profession. Three of those areas, in particular, we would like to highlight:

1. Charitable organizations are more skilled at certain types of relationship building.
2. Charitable organizations run more efficient and effective campaigns.
3. Charitable organizations do a better job of attracting Millennials.

We'll examine all these concepts in more detail below and share case studies from both the fundraising and association industries about organizations that are successfully building equitable relationships with their various audiences, conducting compelling campaigns that have a measurable and significant impact, and attracting young people to their causes and professions. 



Everyone's Doing It: Fundraising Gets Democratized

First, a little background on the fundraising environment for association professionals reading this. As is the case with many industries, the internet has disrupted fundraising. While fundraising remains a profession that takes time to learn, plan, and implement, the internet has democratized the craft—something that was clearly demonstrated in August 2017.

Less than 48 hours after Hurricane Harvey flooded the city of Houston with record rainfall, multiple ways to donate, fundraise, and support relief efforts flooded email and social media. By the following week, when Hurricane Irma ravaged the Caribbean, social campaigns were immediately ready to go. That process repeated itself when, a month later, the extent of Hurricane Maria's devastation became clear.

The point is that, today, raising money online swiftly and through a variety of channels is routine. The internet has democratized what once might have taken the massive mobilization of a presidential or gubernatorial decree, international NGOs, and the professional development staff of multiple organizations. All it takes to raise money for a cause in 2017 is the desire and determination to ask and a little bit of technical savvy.

This is a double-edged sword.

In a way, it's a good thing. After all, who can't use more help, or shouldn't be able to offer it, quickly and easily, during a historic, catastrophic, 50-year weather event?

But not all fundraising is created equal. And therein lies the challenge.

First, because anyone can fundraise, professional fundraising staff are now operating in an environment where the lines are blurred between what they do and what, for instance, a concerned citizen does single-handedly to support a dialysis patient after Hurricane Maria knocked out the electrical grid in Puerto Rico. Donors have the expectation that any charitable giving they do is tax-deductible. Except that's not always the case if the sponsoring entity for the GoFundMe or IndieGoGo campaign isn't properly registered with the IRS as a charitable organization. Other crowdfunding players like Kickstarter require campaign sponsors to reach their stated goal before they can get access to their funds. While fundraising professionals know these things, the public may not.

More important, fundraising cannot exist without relationships. It's ultimately one long courtship, where the "ask" should be almost a formality. The person asking should know the person being asked is going to say yes. This has always been the core of donor development. Now that there are so many competing suitors, though, fundraising professionals have to work even harder to make it onto a prospect's dance card. It is precisely because everyone can, and does, ask that fundraisers must cultivate relationships with ever more care.

This should sound familiar to association professionals. The internet has also democratized associating. Like-minded people can now find each other, organize, and create solutions to their professional challenges without paying dues to an association. Much like with fundraising, those self-organized groups may miss some of the benefits of formal organization (it's not an easy matter for a few volunteers to publish a peer-reviewed journal, create a respected certification, or run a conference for 10,000 people), but there is a new competitive landscape that calls on association executives to change the way we relate to our audiences as well.

It's no longer business as usual. 

Treat People Equitably, Not Equally: Earning and Cultivating Relationships

If you've ever been to the theater, you've probably noticed the donor listings in the program, grouped by amounts given. The list usually starts with some big corporate donors, followed by family foundations, then individual donors at various levels. They all gave—although at different amounts—and they all got recognized. But while all donors are equally valued, not all are equally rewarded.

Without a doubt, everyone who makes a donation should feel valued, appreciated, and thanked. But different levels of giving are a result of different kinds of relationships that carry different expectations and responsibilities on both sides. For instance, a \$25 donation on a text-to-give campaign might merit a text reply acknowledgement. A \$250 donation merits a personal letter thanking the donor (and not just because the IRS requires a letter as proof of donation for tax deductibility starting at that level). A \$1,000 donation is likely to carry additional benefits for the donor: invitations to special events, personal outreach from the senior leadership of the organization, facility or “behind the scenes” tours, priority access, and so on. The donors are treated equitably—they're all thanked—but not necessarily equally. They're thanked in ways that are appropriate to their level of giving.

All Members Are Not Equally Valuable

Association professionals are inclined to treat all members equally. Everyone who pays a certain amount of money for a certain set of benefits should be treated the same as everyone else who's paid that money for those benefits. But all members are not the same.

Some of your members are, for lack of a better term, “mailboxers.” They pay their dues, they receive your communications, and that's pretty much the extent of the relationship. For many, that's all they want, and that's fine.

“Association executives tend to treat members equally when they should be treating members equitably.”

But other members are more involved. They have a deeper relationship with your association. This could be expressed in all sorts of ways: regularly attending virtual or in-person events, earning your credential, writing for your magazine or journal, amplifying your messages on social media, speaking at your events, acting as an ambassador to recruit new members and make them feel welcome, voting in your elections, sharing your content, proctoring your certification exams, mentoring other members, serving in an official volunteer capacity on your standing committees or board of directors, and so on.

Are both of these kinds of members equally valuable to your association?

No. Some of them are like \$25 one-time donors, and some of them are like donors who make large, multi-year commitments. Association executives tend to treat members equally when they should be treating members equitably.

In membership associations, the tendency is to reward novelty rather than loyalty. The new member gets the discount. The first-time attendee gets the unique badge ribbon and the special reception with the board of directors and committee chairs. The first-time book buyer gets the coupon for a discount off her next purchase. The new certificant gets the pin. We're not saying don't do those things; what we are saying is don't *only* do those things.

Just as those more involved members have increased their level of commitment to your association, your association needs to increase its level of commitment to them. What will that look like? We don't know. Your members are unique, and their goals and challenges are unique.

Treat People Equitably, Not Equally: Earning and Cultivating Relationships

But what we do know is that charitable organizations with high engagement rates do one thing consistently: They talk to their donors.¹ They don't just reach out when it's time to give to the year-end campaign. Smart fundraisers find other reasons to have conversations, to make their missions relevant to their donors' daily lives. It takes time to get to know people, to learn what they want and what matters to them, and to understand how that aligns with the organization's mission. Smart association professionals need to do the same, talking to their most involved members to learn what's meaningful to them and making sure they're delivering it.

This Relationship Isn't Working

Sometimes, despite a fundraiser's best efforts, a donor stops giving. Of course, the fundraiser wants to find out why. Did the donor's financial situation change? Maybe she went back to school, or had a baby, or her kids started college, or she's just retired. Did he move to another city and is now giving to organizations there? Did her interests shift from animal welfare to K-12 education?

Obviously, the way one finds out is to ask the donor why she stopped giving. But once again, a \$25 donor is not the same as a \$1,000 donor, and a one-time donor is not the same as a donor who's given regularly for a decade. Fundraisers know to scale their reinstatement efforts appropriately, devoting more time, money, commitment, and effort to finding out why larger-dollar-figure and longer-tenured donors left and to addressing the problem.

When it comes to association member retention and, when necessary, reinstatement, it's also important to treat members equitably rather than equally.

Let's say you get a new member who joins on the last day of early-bird registration for your annual conference and picks the "membership + member registration rate" package. Your conference is in Seattle, and he lives in Seattle. At the end

of the next year's renewal cycle, with your next conference coming up in Boston, you notice that he's lapsed, so you put him back into your lead cultivation cycle.

Let's say you also have a member who's been with you for 15 years. She holds your professional certification, has presented at some of your events, is a regular contributor to conversation on your white-label social network platform, and served a three-year term on one of your committees. At the end of next year's renewal cycle, you notice that she's lapsed.

"The first member took your association out for coffee and realized you weren't a match. That happens. The second member has basically served your association divorce papers. You should find out why."

What happens next?

Far too often, she goes back into your lead cultivation cycle but otherwise doesn't receive any sort of special attention.

Those two members are not equally valuable to your association, and treating them as if they are is disrespectful of the investment that the second member has made in your association. With the first member, it's reasonable to infer that he joined to attend your meeting because it was local and that was all he was looking for from your association. He should go back into your lead cultivation cycle but otherwise probably doesn't merit additional reinstatement efforts. But that second, long-term, highly involved member has earned the right to more attention. Her departure should trigger alarm at the highest levels of your association and direct, personal outreach to find out why she left and whether the association can do anything to reclaim her. The first member took your association out for coffee and realized you weren't a match. That happens. The second member has basically served your association divorce papers. You should find out why.

1. <https://npengage.com/nonprofit-fundraising/12-donor-retention-tips-from-nonprofit-fundraising-experts/>

Where Is My Money Going?

Fundraisers also honor their relationships with donors by being transparent about where their money goes. That's partially because, as noted previously, charities operate in a highly competitive environment. Fundraisers must constantly demonstrate why they, rather than another charity, are worthy of donors' time, effort, engagement, and, ultimately, dollars.

Fundraising organizations are also held to extremely high standards by independent third-party organizations like Charity Navigator, CharityWatch, and Guidestar, which rate charities in part based on what percentage of their revenues goes to their actual mission-driven program service work versus overhead and fundraising (that is, money spent to raise additional money). This practice is controversial, as some argue that controlling overhead costs tightly to earn top ratings restricts charitable organizations' ability to invest in the infrastructure they

need to be effective², but the point is that fundraisers tell donors where their money is going.

Membership associations are often not transparent with members about which revenues are funding which expenditures. Membership dues, in particular, are frequently used to fund programs, products, and services that are not necessarily membership benefits and may even be "loss leaders" for the association. We're not saying that's wrong; associations sometimes need to provide programs, products, and services that benefit the professions or industries they serve but are not independently financially sustainable. What we're urging is transparency about what additional programs, products, or services are supported by membership dues (or conference fees or corporate partnership payments) and what those additional items cost, and we also suggest robust and open conversation with members (or attendees or corporate supporters) about whether they approve of investing their money in those ways. ✨

2. https://ssir.org/articles/entry/the_nonprofit_starvation_cycle

CASE STUDY:

Woolly Mammoth Theatre Company Building Authentic Relationships With Donors

“Our major donors are really special and important to us. In order to insure they are getting the most out of this relationship, we ask them what makes this relationship worthwhile to them, so we can target what they value.”

Sarah Slobodien Dove, Director of Organizational Advancement

Woolly Mammoth, a Washington, DC-based theater company with a \$4.5 million budget and 27 full-time staff members (five of whom are devoted to fundraising and donor relations), takes an intensely personal approach to building donor relationships that starts with the very first show a patron attends.

“Most of our donors initially discover us because they attend a show, or get invited by a friend to one of our special events,” said Sarah Slobodien Dove, director of organizational advancement. “We have a small development staff, so we can’t make a bunch of cold calls. We wait for them to make the first move.”

But, once they do, all levels of donation include some sort of benefits, even if it’s just recognition on the organization’s website. Even relatively low levels of giving include more options, which helps Dove and her staff move donors up the ladder of engagement.

According to Dove, “Our first step is to invite donors to take advantage of the benefits available at their level of giving. If a donor isn’t taking advantage of their benefits, someone from our staff will call them. Maybe they didn’t know what they had access to through their donation, or maybe there was a barrier to using that benefit, like needing childcare to attend a weekend daytime event, but this also opens the conversation to talk about other ways they might like to be engaged.”

How does the Woolly Mammoth staff know what to offer? “Our development staff has a lot of creative ideas—some work and some don’t. So we talk to our donors all the time,” said Dove. “From that first gift, where we’ll reach out to arrange a meeting the next time that new donor comes to a show, we’re constantly asking our donors what they like and are using and what else they might be interested in.”

What constitutes a “major donor” for Woolly Mammoth? “Anyone who gives \$1,000 or more. That’s a couple hundred people, and I know almost every single person who gives at or above that level,” said Dove.

It’s at that major donor level that Woolly Mammoth really starts to build relationships and customize offerings. Although, even at those higher levels, there are standard (more generous) benefits packages, as Dove noted: “We try to understand what in the packages people like and react to. If a donor doesn’t care about anything on the list at her level, or only cares about one of the six items, we try to personalize a package for her as best we can. It’s in our best interests to ensure every donor has a good experience.”

Because of the focus on relationship building within the development staff, Woolly Mammoth has achieved a 53 percent overall donor retention rate and an outstanding 90 percent retention rate for donors making gifts over \$1,000. It also enjoys a good return on donors increasing the size of their gifts over time and a very low rate of written-off pledges—less than 1 percent. In addition, it recruited more than 600 new donors in 2017.


CASE STUDY: Woolly Mammoth Theatre Company Building Authentic Relationships With Donors

Dovere offered a few pieces of advice for other nonprofits trying to build authentic relationships with their supporters. “Everybody wants something different out of their relationship with you. Particularly if you have a small staff, you have to balance flexibility and structure. Ask yourself: ‘How do we give people what they want in order to have a fulfilling relationship and create a great experience for them, while also maintaining enough structure to be able to deliver what we promise?’”

Dovere also cautioned against leaving things too wide open in conversations with your audiences about what they’re looking for in their relationship with you. “You can’t just ask a bunch of open-ended questions about what your audiences might want. People don’t know how to answer those questions. They need to know what their options are. Give them some examples first, then ask them to react and offer their suggestions.”

She also reminded us of the importance of checking actual behavior against expressed preferences. “You have to audit your benefits periodically to see what your audience is really using. For instance, at the \$500 and up level of giving, we offer a free parking pass to use when you come to the theater. In downtown DC, that’s a valuable benefit, at least for some of our donors. But some take public transportation, so we need to pay attention to that. Also, this past year, we realized that no one was taking advantage of attending the show closing party. It’s good to know that, so we can adjust our benefits packages accordingly.”

About Woolly Mammoth Theatre Company

Woolly Mammoth Theatre Company was founded in Washington, DC, in 1980 and serves an essential research and development role within the American theater. “For the past 36 years,” wrote American Theatre magazine in 2015, “Woolly Mammoth has been bringing innovative and original plays to the local community.” Plays premiered here have gone on to productions at more than 200 theaters in 39 states and 12 countries. This track record has established Woolly as a national leader in the development of new plays and longstanding acknowledgement as “Washington’s most daring theatre company” (*New York Times*, 1991). 

If You Don't Ask, the Answer is Always No: Creating Compelling Campaigns

Associations run campaigns for all kinds of things: membership recruitment, membership renewal, registration for the annual conference and other in-person events, professional-development training, publications, webinar series, salary surveys, standards guides, advocacy efforts—the list goes on. In fact, associations are usually running multiple concurrent campaigns out of multiple different departments. Many associations have members due to renew every month on their anniversary dates, while at the same time needing to promote the programs, products, and services of many other functional areas.

Association marketing campaigns are often “campaigns” in name only, though, and would be unrecognizable to a fundraiser—or a for-profit marketer.

Let's take the example of a renewal campaign, something that every membership association conducts.

A typical association membership renewal campaign, far too often, consists of little more than a series of automated reminders that look like automated reminders—poor or nonexistent graphics, odd formatting, stilted language, “from” addresses that make no sense, vague signature blocks—generated by the organization's association management software (AMS), sent to “Dear Colleague,” and doing little more than reminding the recipient that it's time to pay her membership “invoice.” (Of course, as any competent membership professional can tell you, it's a renewal notice, not an invoice. Your member is not obligated to pay it, it's not a formal receivable, and, if she chooses not to pay, there is no penalty other than her membership lapsing.)

Three Keys to Winning Campaigns: An Interview with Shonali Burke

We recently had the opportunity to interview Shonali Burke, social PR strategist, founder of #measurePR, and adjunct faculty at The Johns Hopkins University, about the lessons she's learned putting together winning PR campaigns for clients and employers in the past two decades.

Key One: You have to know where you are to know where you want to go.

Burke was recruited by the ASPCA about a decade ago to revamp its communications and public relations. When she arrived, ASPCA had just created a new strategic plan that was designed to be ambitious and metrics-driven. The stated goal for the communications function was “to be the top-referenced source for the U.S. media on animal welfare issues” within the five-year period covered by the plan. Burke was hired to make that happen.

“The first question I asked was: ‘If we want to be number one in five years, where are we now?’ and no one could answer me with any degree of certainty,” said Burke. “I knew that I couldn't figure out how to get us to number one if I didn't know where we were starting from.”

To answer her question, Burke hired a research firm to perform both an external audit of journalists who cover animal welfare and an internal audit of the existing ASPCA communications and PR functions.

“The audit report clearly showed we needed to reallocate resources to increasing our in-house staff, who would be able to implement aggressive media outreach far better than any agency,” said Burke. “That was a critical element to taking us to number one. And it's really hard to argue with good data.” *(continued on next page)*

If You Don't Ask, the Answer is Always No: Creating Compelling Campaigns

Assuming the member decides to renew, she commonly clicks on a link that takes her to a login page on the association's website with no further instructions or indication of how much she will need to pay. She must then remember her login name and password, which she may not have had the opportunity to customize and where she may not be able to perform a simple Amazon-style retrieval or reset, which can necessitate a call to customer service, available only from 9 a.m. to 5 p.m. in the time zone of the association's headquarters. After she logs in, she may not be automatically redirected to the membership form—that is, she might have to figure out how to navigate there.

Once she navigates to the form, which hopefully is pre-filled with her information (after all, she just had to log in to even get this far), she generally will have to click through multiple pages and options—or scroll down one *very* long single page—answering all sorts of questions, some of which ask for demographic information where she's not clear why the association is asking or how it intends to use (or safeguard) that information, and having to click through all sorts of extras (“Add a foundation donation!” “Add a conference registration!” “Buy our new book!”) before she can actually pay.

Once the transaction goes through, she often receives nothing more than a generic “thank you for renewing” confirmation page or automated email, again evidencing all those “this came from a machine” characteristics: “Dear Colleague,” poor or nonexistent graphics, odd formatting, stilted language, “from” addresses that make no sense, and vague signature blocks.

And on the back end, generally speaking, the only campaign tracking the association does is to compute how many members renewed or lapsed in total by the end of the campaign. It's rare to track metrics like how many members renewed in response to each notice, which links in which notices drew the most clicks, how many people abandoned the process somewhere before completing the renewal, and where they abandoned the process.

Interview with Shonali Burke (cont'd)

Key Two: Empower your evangelists to tell your story for you.

More than 51 million refugees are displaced by war, violence, or persecution. Upon resettlement, many refugees integrate so successfully that their refugee status becomes invisible.

To raise awareness of these facts, USA for the UNHCR (the United Nations refugee agency) launched the Blue Key Campaign in 2010. In addition to its more traditional media campaign, the organization wanted to make a splash in the digital realm. So it turned—via one of her former Hopkins students—to Burke.

The Blue Key Campaign concept was simple: Supporters could buy a blue key pendant or key chain and wear or display it to signal support, raise awareness of the issue of refugee resettlement, and spark conversations.

“We targeted people who were influencers in the nonprofit world and on social platforms more broadly and who would be open to amplifying our message to their followers. If they also happened to be active in or engaged with the refugee cause, even better, but it wasn't a requirement. What they did need to have was an affinity for cause-based work and the ability to engage their community. Then we gave them the tools that allowed them to tell our story to their audiences,” said Burke.

(continued on next page)

We wish this demotivating process was a unique factor of renewal campaigns, but it's not; this off-putting and member-unfriendly scenario repeats with conference campaigns, certification and accreditation renewals, new product launches—it's the sad rule, rather than the unfortunate exception.

If You Don't Ask, the Answer is Always No: Creating Compelling Campaigns

Contrast that with a typical fundraising campaign.

The brightly colored, eye-catching, image-filled, multichannel campaign has a consistent look and tone, and, perhaps most important, emotional feel. The communications tell stories, in which the prospective donor has the opportunity to be the hero and make a difference to something he cares deeply about. Different audiences receive appeals on different communications platforms. Major donors get personal calls or maybe even visits. Older donors get direct mail. Younger donors may be invited to text to give. Everyone gets email, and those messages are colorful and eye-catching, addressing the recipient by name and littered with opportunities to click: standard links, donate buttons, clickable images, clickable social links. Social media is an intrinsic part of the campaign, whether it's conversational posts from organization-branded accounts that are still allowed to have some personality, or working with influencers in the space to spread the campaign message, or using social ads and retargeting. When people click, they go directly to a simple landing page that immediately or almost immediately asks for three critical pieces of information: Who are you, how much do you want to give, and what's your credit card number? Results are tracked by communications vehicles and audience segment in real time so that resources can be quickly diverted from methods that aren't working well to methods that are. Donor thanks comes quickly, personally, and sincerely, by multiple methods, and often with the opportunity to share information about the campaign with friends via social platforms or email.

How do fundraisers do this? Is it magic? Something they only tell you after a certain number of consecutive years of membership in the Association of Fundraising Professionals?

No. Fundraising organizations take their campaigns seriously and plan for them, often months in advance. The overall look and feel of the campaign is driven by making

an emotional connection with prospective donors. It might be outrage at an injustice, or sadness about abused animals, or inspiration at how the organization helps returning offenders reintegrate into their communities in positive ways, or humor at the wild costumes participants wore to the charity race or polar plunge. But that emotional connection, that story (or stories), is the touchstone of every communication related to the campaign, no matter the platform or the recipient.

Interview with Shonali Burke (cont'd)

Key Three: Focus on solving problems, and the money will follow.

If you're an animal lover, you may remember that in 2007 there was a major recall of a number of brands of pet food after reports of cats and dogs suffering renal failure due to melamine-contaminated wheat gluten and rice protein that was used as a thickener.³

Burke noted: "The ASPCA started getting a lot of calls into our toll-free animal poison control center, so we developed an online Pet Food Recall resource center to keep our 'pet parent' constituents informed of the latest developments in the recall."

The ASPCA's goal was to inform the public and be a source of reliable, validated information for the media. This was most definitely not a fundraising campaign; however, the valuable service the organization was providing for free motivated many people to give.

"When your mission aligns with values of your stakeholders, that's when the magic happens," said Burke. "If you focus on helping your audiences—whether they be members or people who care about a particular social cause—and solving problems that are of critical importance to them, the money will follow."

3. https://en.wikipedia.org/wiki/2007_pet_food_recalls

“How do fundraisers do this? Is it magic? Something they only tell you after a certain number of consecutive years of membership in the Association of Fundraising Professionals?”

Fundraisers then answer a series of questions to create their campaign strategies:

- What are the goals of the campaign?
- What's the call to action? What do you want people to do?
- Who are your audiences? What do you know about them? What are your key audience segments?
- What messages about your call to action are persuasive to your prospects? How should those messages vary by audience segment?
- What tactics are you going to use? What communications platforms and channels are available to you? How should use of those platforms vary by audience segment?
- What resources (both financial and non-financial) can you enlist?
- Who's responsible to do what? On what schedule?
- How will you know whether or not you met your goals?

Let's look at some good practices associations should adopt related to each of these questions.

Goals

We all know goals should be SMART: specific, measurable, achievable, results-focused, and time-bound. Charitable organizations are great at this. For the typical year-end campaign every fundraiser runs, that would look something like: “We are going to launch a year-end campaign that will run from immediately after Labor Day through December 31. Our goal is to raise \$107,500, which will represent a 7.5 percent increase over last year's year-end campaign total of \$100,000.”

Associations can—and should—do the same. Returning to the renewal campaign example from above, a SMART goal for a renewal campaign would be something like (for an organization that renews everyone at the same time): “Given that our members renew on the calendar year, we are going to launch our renewal campaign on September 15 and run it through February 1. Our goal is to renew 81.9 percent of our members, which will represent a 5 percent increase over our five-year renewal average of 78 percent. We have 1,200 members due to renew, and our goal is to renew at least 983 of them.”

That campaign goal is simple to understand and communicate. It's an ambitious goal but not a ridiculous one. (“Our goal is to renew 95 percent of our members, even though our five-year renewal average is 78 percent” would be.) And you know exactly how much time you have to accomplish it: You need to be ready to go with your first notice on September 15, and you'll evaluate and report on your final results on February 1.

See the “Three Keys to Winning Campaigns: An Interview with Shonali Burke” sidebar on page 8 for more information on how to set good goals, including one critical step that many organizations overlook.

Call to Action

What do you want people to do? It's OK to ask for more than one thing, but don't ask for more than one thing at a time. Charities do this well: First, sign the petition. Then, can you also give \$10? Then, here are the links you can use to share this campaign with your friends on social media or via email.

Associations often behave as if each communication with members is the only communication you'll ever be able to have, so you stuff everything about everything into that one communication, whether it be an email that tries to promote every single thing the association is planning to do or offer in the next six months or an envelope overflowing with one-sheets for every program, product, or service that could get its departmental act together to meet the mail deadline. If you want people to register for your conference, just ask them to register for your conference. After they've completed that transaction, then it's OK to present them with another option, but make sure it's related. So, rather than asking for a generic donation to your foundation, maybe ask for a donation to your conference scholarship and travel fund for young professionals. And then provide registrants with an "I'm going!" badge they can use on their social profiles.

Also think about the "why": What's your purpose?⁴ Obviously, you want members to renew or to register for your event or to buy your new book, but why should they do that? What's the end goal? It shouldn't just be "to bring revenue into the association." Thinking about this early will help you see the world from the members' perspective, which will then help you frame your messages to focus on benefits that will help your audiences achieve their most important goals or solve their most pressing problems, rather than merely reciting a list of features your association provides.

Audiences and Messages

Associations have a clear advantage in audience knowledge but often don't take full advantage of it. The membership relationship is generally deeper and more enduring than the donor (or customer) relationship, so, in theory, associations know more about their audiences than charitable organizations (or for-profits) do.

Yet fundraisers segment and A/B test like mad. Do different generations have preferences for different giving platforms? Do audiences behave differently based on geographical factors, educational attainment, household income, or other key demographics? Which is more effective: a red donate button or a blue donate button? What kinds of images perform better? How many links lead to the highest click rate?

Associations have access to this data. Before launching a renewal campaign, you can query your database to find out which members used which benefits in the past year and target your renewal messaging appropriately. You can find that magic point where, if a member has renewed than many times, she'll be with you forever (or at least until she retires or changes careers), so you can focus more of your attention and resources on the members who haven't hit that point yet. You know who always attends, never attends, and sometimes attends your annual conference, so you can concentrate your resources on the "sometimes" group. You know what kinds of professional development topics your audience members have paid attention to in the past, so you can target marketing for your new webinar on the people most likely to be interested in its subject matter.

4. <http://www.limegreenconsulting.co.uk/blog/eight-top-tips-for-creating-and-launching-outstanding-fundraising-campaigns>

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Thanks to resources like the annual *Informz Association Email Marketing Benchmark Report*, association executives know that more targeted campaigns lead to more clicks.⁵ You just have to discipline yourself to take the time to use the audience data you have to segment your campaigns appropriately.

When conducting campaigns, fundraisers frequently focus on emotional storytelling, in which there's a problem to be solved that tugs at the heartstrings and where the donor can then be the hero who helps to solve that problem with his gift.

Associations are not saving the baby pandas. But you can still tell stories. Associations exist because there are goals the members want to achieve or problems they want to solve that they either cannot do at all on their own or cannot do as efficiently and effectively. Both of those—goals people want to achieve and problems they're trying to solve—are potential sources of stories you can tell about how your members, joining together through the association, were able to achieve those goals or solve those problems. You may not get to use pictures of cute puppies, but your members can still be the heroes of your story. And, for goodness' sake, personalize. It's 2017. No member should ever get a "Dear Colleague" communication from her membership association. In fact, at this point, not only should all communications include her name, they should, to the greatest degree possible, include conditional text that indicates that you know some things about her. Yes, that requires more work than just blasting out the same generic, automated "Dear Colleague" message to everyone: tracking information about members, using it to create segments, writing and editing targeted text for each segment, and purchasing and learning the technology to make it work. But your members are your ultimate bosses, and you owe it to them to do your best work for them.

Platforms/Channels

According to Blackbaud's *5th Annual Charitable Giving Report: How Nonprofit Fundraising Performed in 2016*, 17 percent of donations were made through mobile in 2016.⁶ The Informz email report mentioned previously bears that out for associations: Mobile is by far the most popular platform for viewing emails, clocking in at over 40 percent.⁷ Because of this, "Blackbaud recommends a multi-step approach that includes mobile-friendly email messages, websites, and donation forms."⁸

What that means, in a practical sense, is that associations need to do more end-to-end testing of processes. In order for members to have a good user experience, not only must associations reduce barriers ("You're requiring my password, I can't remember it, you don't offer auto-retrieval or reset, and your office is currently closed, so I can't call for help."), you also need to make sure the entire process works via smartphone. Yes, that means that not only does your email need to be mobile-friendly, but so does your renewal process or conference registration process or grassroots-advocacy action process. Charities know: Make it as easy as possible for people to give you their money. Don't give them an excuse to abandon the process midway through.

It's also critical that campaigns include more than just email. Association email open rates are good, averaging above 35 percent.⁹ This is well above the average of every other industry profiled in the annual MailChimp Email Benchmark Report.¹⁰ But it still means that nearly two-thirds of your members are likely not reading your emails, including your renewal notices or new professional development series marketing campaign. You have to create other kinds of marketing touches.

5. 2017 Association Email Marketing Benchmark Report, pgs. 13-15

6. 5th Annual Charitable Giving Report: How Nonprofit Fundraising Performed in 2016, pg. 12

7. 2017 Association Email Marketing Benchmark Report, pg. 13

8. 5th Annual Charitable Giving Report: How Nonprofit Fundraising Performed in 2016, pg. 12

9. 2017 Association Email Marketing Benchmark Report, pg. 8

10. <https://mailchimp.com/resources/research/email-marketing-benchmarks/>

Three Essential Ways to Promote Your Campaign with Social Media

By John Haydon, Chief Heretic and Pyrotechnician, Inbound Zombie, Inc.

You've spent weeks brainstorming, organizing, and planning your amazing campaign. Everything is perfect, and you can't wait to launch.

But, at the end of the campaign, your results dramatically underperformed expectations. Your renewal rate was dismal, your conference registration was much lower than projected, you didn't even sell enough books to break even, only ten people showed up for your webinar. Your team and your senior leadership are disappointed. What could you have done to make your campaign better?

You could have used social media to promote your campaign for higher participation and more revenue for your organization.

1. Let your Facebook fans know about your campaign.

Most of your members probably use Facebook. If your page has a large following, use it to your advantage.

- Create posts about your campaign that link to a dedicated page on your website that has more information.
- Post pictures and Facebook Live videos to attract followers' attention. Facebook gives priority (at least for now) to posts that contain images or video, so use them smartly to help your posts stand out from the sea of vacation pictures and silly memes in your followers' timelines.
- Use Facebook ads. Facebook ads are an economical way to spread the word about your campaign, and you can target them precisely to the audiences you want. For more information on how to do this, see my detailed post on using Facebook ads for events (<https://www.johnhaydon.com/facebook-ads-for-fundraising-events/>).

2. Create a hashtag for your campaign.

If your organization has a large Twitter following, consider using a hashtag for tweets related to your campaign. Hashtags help your followers find relevant information about your campaign and easily interact with your association.

Plus, if enough of your followers use the hashtag, it could end up trending nationally or even globally! Trending hashtags are seen by all Twitter users and have the potential to give your campaign a major boost.

To learn more about how to use hashtags effectively to promote your organization, see my hashtag primer (<https://www.johnhaydon.com/hashtags-101>).

3. Tell your story with video.

The great thing about videos is that they're extremely shareable. You can post a video on YouTube and then share the link on Twitter and your Facebook page, ask your followers to share it as well, and embed it on your website or blog.

But keep your videos short. Few people want to sit through a video that lasts much longer than 60 seconds. By keeping your message to the point, you'll be able to capture followers' attention and give them more information about your campaign.

Additionally, videos have a certain human quality to them. Seeing a person telling their story is more powerful than reading about their story.

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On which platforms?

Certainly some direct mail is in order. Although the latest version of the *Marketing General Membership Marketing Benchmarking Report* reveals that email has finally surpassed direct mail as a source of new members¹¹ and renewals,¹² direct mail remains in the top three marketing channels. Send some postal mail.

What else might you use?

A plethora of options are available to marketers these days: search engine ads, social ads, ad re-targeting, video, print ads (in your own or others' publications), website ads (on your own or others' websites), Facebook, Twitter, Instagram, Pinterest, Snapchat, YouTube, Facebook Live, Medium, Reddit, Tumblr, text, word of mouth (formal, like Member-Get-a-Member, or just "tell a friend" requests, often facilitated by tools that make that easy to do on social platforms), marketing at events (your own or others), postcard campaigns, telemarketing, ads or native content in newsletters (your own or others), inbound/content marketing, in-person meetings ... the list goes on.

Which ones are right for your association? We can't answer that. Some of it depends on where your members are and where they're willing to engage with you (everyone is on Facebook these days, but they might not want to be your friend there). Some of it depends on your staff members' skills, experience, and interests. Some of it depends on your audience size. Some of it depends on your available financial resources.

***"Email is cheap and easy,
but remember: Two-thirds of your
members are not reading it."***

What we can tell you is that fundraisers experiment with different channels all the time, and associations should, too. We're not advocating that you should dump all your traditional methods and run your entire next campaign on Snapchat, but we encourage you to try at least one new channel for your next campaign and see what happens. Just be sure to track what's happening in real time on that new platform, to pull the plug if it isn't working or to divert more resources to it if it's unexpectedly successful. Whatever you do, your campaign must be multi-channel. Email is cheap and easy, but remember: Two-thirds of your members are not reading it.

See John Haydon's "Three Essential Ways to Promote Your Campaign with Social Media" sidebar on page 14 for more tips on using social platforms to support your campaigns.

Resources

It's likely that, when you read "resources," the first thing you think of is money. That's OK; figuring out how much you can spend on a given campaign, and how you intend to invest that money, is important.

For example, let's say you have \$5,000 to invest in a recruitment campaign. That campaign produces 25 new members, each of which pays \$100 in dues, for a total of \$2,500 raised. Was that campaign a success? Given that your cost to acquire was \$250 (\$5,000 invested / 25 new members acquired), and your dues are \$100 a year, you might be tempted to say no.

11. 2017 Membership Marketing Benchmarking Report, pg. 23

12. 2017 Membership Marketing Benchmarking Report, pg. 41

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But you're forgetting something called Life Time Value (LTV) of membership. Unless you have a serious problem with membership churn, some of those 25 new members will renew next year. Even those that don't renew may purchase additional programs, products, or services during their membership year or contribute to your community in other ways. Those members who do renew past year one will almost definitely make additional purchases and contributions. That's LTV. It can be a little hard to calculate, particularly if you try to answer questions like: How many of those 25 new members are going to renew for years two, three, and beyond, and what are they going to buy in those additional years? Are there differences between how different types of members use association programs, products, and services over time? What's the value of their non-monetary contributions? There is no one correct answer to any of these questions, so LTV calculations tend to be somewhat "squishy." The important thing in constructing your particular association's LTV formula is to clearly document the assumptions you use to construct it, both so you can replicate the process to generate information you can compare over time and so you know what to adjust if it seems to return inaccurate results.

You have resources beyond the financial, though. Those include things like the rest of your association's staff, your volunteers, your members, your corporate supporters, employers in your profession or industry, universities or other training programs in your profession or industry, and friendly aligned organizations in your profession or industry. Any or all of them can be used to help "boost the signal" of your campaign. Some, your champions or ambassadors, might do it for love of your association. That could look like tasking your membership committee with making calls to at-risk members at the beginning of your renewal campaign to let them know their renewal notices will arrive soon and to highlight some of the good things that will happen in the coming year that those at-

risk members will miss out on if they don't renew. Some might be persuaded by the ability to win prizes or just recognition that they were the best, like in a Member-Get-a-Member campaign. Some might be persuaded to help for the good of the future of the profession or industry, like working with university professors to promote membership in the association to their students. Your fellow staff members should be informed that a campaign is going on, so that, as they interact with members around their own program areas, they can conversationally bring up your campaign: "Will I see you in Boston at our upcoming annual meeting?"

It is common practice in fundraising organizations for board service to include a "give or get" requirement. That is, each board member is given a specific financial responsibility: You either give that amount yourself or you solicit that amount in gifts from your own network. Associations don't need to play our campaigns so close to the chest. It's OK to let your members know that registration for your annual conference is open, that your goal is to break 1,000 paid attendees this year, and that you want their help achieving that goal.

Relatedly, many charitable organizations successfully employ a tactic called "friend-raising." Friend-raising is "building sustainable relationships ... to (co)create a wide variety of ways to support your organization."¹³ Friend-raising is built on something called the "network effect," where adding more nodes to a network increases the overall value and effectiveness of that network. Invite interested people to help with your campaign and give them tools to make it easy for them to spread the word, ranging from the virtually effortless, like social sharing buttons with messages that are specific and tailored to the campaign, to more involved things like scripts for conversations (your volunteers) and customizable collateral (employers or teachers/trainers in your field).

13. <http://101fundraising.org/2012/04/6-things-you-get-with-friendraising/>

Schedule and Responsibilities

This is the point in campaign planning where you decide who is going to be responsible to do what on what schedule.

Charitable organizations tend to be highly focused on this because they often must meet very specific deadlines. If you've ever given to a charity, you're well aware of at least one of them: end-of-year campaigns. It will likely not surprise you to learn that charitable organizations bring in anywhere from 15-20 percent of their total annual revenue in December each year, and if you include the final quarter of the year (October through December), it's a full 33 percent.¹⁴

Because of that, most fundraisers begin planning for year-end over the summer. They start with December 31 as their drop-dead date, because all credit card transactions must be posted and checks must be mailed by then to be deductible in that tax year.¹⁵ They then work backward through all the various notices they want to send, allowing appropriate time between them for response (longer for direct mail, shorter for electronic communications), and including time to draft and edit copy, create graphics, construct email templates and web landing pages or microsites, and create and place ads. They can't afford to get lazy just because they do year-end campaigns every year—there's too much revenue at risk.

Association executives can be guilty of “set it and forget it” thinking, particularly for things like renewal campaigns that they may run every single month (in cases where members renew on their anniversary date). Has your renewal campaign gone stale? Do you do the same exact thing every time you publish a new book?

Here's a secret of campaigns: While the specific stories and words and pictures and channels matter, you can often improve your results just by paying attention and refreshing collateral. We don't quite know why that happens, but in our combined 40-plus years of professional experience, we've both noticed the effect: Putting in focused effort, almost regardless of how and where it's directed, leads to better outcomes.

“Dans ses écrits, un sage Italien dit que le mieux est l'ennemi du bien.”

On the other hand, don't get so tied up in planning the perfect campaign that you miss your launch window. As Voltaire put it: “Dans ses écrits, un sage Italien dit que le mieux est l'ennemi du bien.” (“In his writings, a wise Italian says that the best is the enemy of the good.”) Knowledge is always partial, planning is always imperfect, there are always unknown unknowns, so, at some point, remember to declare it “good enough!” and go.

Evaluation

Campaign analysis needs to be continuous and ongoing, examining each communication sent with an eye toward learning to make the next one more effective.

Charities do this well. It's common for them to use unique, trackable URLs in every communication in every channel, even down to tracking the different links from a single email individually. After each communication, the team assesses what the response was, whether it met—or even exceeded—expectations and whether respondents actually went the whole way through to completing the call to action and follow-on calls, as appropriate.

Fundraisers also track progress against the overall goal, often publicly. You've seen these, in everything from the traditional thermometer that fills up as the campaign goes

14. *5th Annual Charitable Giving Report: How Nonprofit Fundraising Performed in 2016*, pg. 8

15. <https://www.irs.gov/newsroom/six-irs-tips-for-year-end-gifts-to-charity>

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along to progress bars on GoFundMe pages or Change.org petitions. This generates excitement among all their audiences—whether staff, volunteers, or donors—as they approach the goal, and it also creates an early-warning system if the campaign is falling behind, so fundraisers can make adjustments to their plans as necessary.

Don't wait until the end of your campaign to look at your results. Pay attention to what's happening along the way. If a message, channel, or audience is underperforming expectations, you can then assess why that might be happening, create some hypotheses, and test them in the next iteration. If a message, channel, or audience is exceeding expectations, you can divert more resources into that standout area.

When you do reach the end of your campaign, hold a formal debrief meeting. Invite as many people who helped with the campaign as you possibly can, which might mean including staff members outside your team or even volunteers or members. Share the results: Did you meet (or exceed) your goal or not? Talk through why you think that happened. Solicit feedback. Ask people to share what they learned about what worked and what didn't work. Were there any major surprises? How can you do better the next time?

Associations tend to skip this step. You're understaffed and overworked, you don't have time, and you figure you'll remember what you learned when it comes time to run the next campaign. You're wrong. You need to document your results and what you learned while it's all still fresh in your memory, and your future self will thank you if you make notes in your campaign plan immediately about what you want to do differently next time and why. Also, assuming you met or exceeded your goals (and remember: if you've brought an increased level of attention and effort to your campaign, there's a really good chance you have), make sure you take time to celebrate that with your overworked team, recognizing and thanking everyone for their contributions. That starts a virtuous cycle of positive attitudes that will only be to your benefit for the next campaign.

Drive It Like You Stole It

We have a final piece of advice on campaigns that relates to the title of this whitepaper.

You may be thinking, "Fundraisers are at least as understaffed and overworked as association professionals, and this seems like a lot of work. How do they manage to do all of this?"

Every fundraiser we've ever known (including ourselves) is a brazen idea thief. We keep idea files of every visually compelling, emotionally affecting, creative, "that is a groovy idea!" piece of collateral we've ever seen, and we are not afraid to rip that stuff off whenever possible.

You don't have to start with a blank slate every time. Remember how Elizabeth's bosses at the fundraising consulting firm were so surprised at how willing associations are to share information with each other? And it's because associations mostly don't compete with each other? That's an association super power.

Build your network. Talk to other association marketing professionals. Ask them what is and isn't working for them. Ask for copies of their collateral. Ask what new channels they're using and how they're using them. Ask them what trends they're seeing. Ask them what they're finding to be effective means of communication with their various audiences across various generations. Ask them what failed and why they think that happened. Ask what's surprised them the most lately in their marketing outreaches. Association professionals are born networkers; if we weren't, we'd be doing something else for a living. Use that to your advantage. 🌟

CASE STUDY:

The Computing Technology Industry Association Inspiring an Industry to Make Tech Her Story

“Twenty years ago, 40 percent of technology industry jobs were held by women. Today, it’s more like 25 percent. So our CEO, Todd Thibodeaux, challenged us as an industry to do better.”

Steven Ostrowski, Director, Corporate Communications

As a leading voice in the technology industry, the Computing Technology Industry Association (CompTIA) is well positioned to track and report on diversity and inclusion in the tech industry. When staff noticed the stats reported in the quote above, they knew they needed to act.

“There’s significant research that it’s not good business to be dominated by one perspective. Additionally, there’s a huge gap between the number of people entering the industry and the number of job openings. Companies either can’t find workers at all or can’t find workers with the right skills. We know that guys can’t fill all those jobs and that we’re wasting talent by not actively recruiting women. So we wanted to challenge our members and member companies to be actively involved in recruiting more women into tech careers and to position ourselves as a go-to source on workforce issues for the industry,” said Steven Ostrowski, director, corporate communications.

CompTIA started with research, conducting focus groups with local Chicago young women in junior high and high school and running a national survey of both young women and young men. Unsurprisingly, its research revealed that everyone was comfortable using technology. So the question became: Where is the disconnect occurring for young women between being a user versus a creator?

CompTIA discovered a few barriers. One is that girls are not actively encouraged to pursue tech careers. “No one says to them, ‘You have the aptitude to do tech work and be good at it,’” said Ostrowski. “Girls also don’t have—or aren’t aware of—a lot of female role models in tech.”

CompTIA also uncovered some misperceptions about what tech jobs involve. “It’s not all being in a server room fixing computers or sitting alone writing code,” noted Ostrowski. “While those jobs exist, there are so many other options.”

That led to CompTIA’s 2017 ASAE Gold Circle Award-winning Make Tech Her Story campaign. The campaign has a dedicated website, <http://maketechherstory.comptia.org>, that offers a variety of resources both for young women who might be enticed into tech careers and for CompTIA members and member companies to assist with recruiting them.

One of the most fun—and shareable—aspects of the campaign involves the re-imagining of World War II icon Rosie the Riveter. This Rosie exclaims: “We can do IT!” (information technology, rather than building airplanes and ships), and young women can customize their own Rosie to look like them, like the example below.



CASE STUDY: The Computing Technology Industry Association Inspiring an Industry to Make Tech Her Story

The campaign is multichannel, including the website; a video and ebook; opportunities to volunteer as a speaker, teacher, or mentor; direct mail; both social and traditional media outreach; and two types of influencer marketing. CompTIA contacted “mommy bloggers” to ask them to write about the campaign, which resulted in reaching over 500,000 people. “We also identified 200 prominent women and mailed a Rosie gift box to them to ask them to engage with the campaign via social media to help tell the story for us. These weren’t all women in tech, so it took some work to figure out who to ask, and it pushed us beyond our comfort zone, but the payoff was tremendous,” said Ostrowski.

CompTIA’s Creating IT Futures philanthropic arm has also gotten involved. Its mandate is to train people in the association’s certifications (such as CompTIA A+, Security+, and Network+), then get them into internships that often turn into full-time jobs. “Creating IT Futures has created pilot programs that are geared specifically towards women, particularly mothers re-entering the workforce, veterans, and displaced workers. For instance, that team has run women-only A+ certification training classes in Minneapolis that have resulted in over 80 percent full-time placement at the end of graduates’ internships or probationary periods,” said Ostrowski.

Ostrowski offered the following advice for running a successful awareness campaign: “You have to empower people to tell your story and be a champion for your cause, like we did with our influencer outreach. And when you ask, you have to be ready immediately with an answer to: ‘So what can I do to help?’ Because, once they’re interested, they will want to help right away, and you can’t tell them to come back later. We want to keep this campaign going as long as it takes for the gender balance in our industry to improve, and our advocates are critical to achieving our ultimate goal of increasing diversity in the tech workforce.”

About CompTIA

The Computing Technology Industry Association (CompTIA) is the world’s leading technology association, with approximately 2,000 member companies, 3,000 academic and training partners, over 100,000 registered users, and more than two million IT certifications issued. CompTIA’s unparalleled range of programs fosters workforce skills development and generates critical knowledge and insight, building the foundation for technology’s future. 

CASE STUDY: New Endeavors by Women Making the Most of a Challenge Grant

“The personal touch made all the difference.”

Tracy Frish, Director of Development and Communications

New Endeavors by Women (NEW) is a small, 29-year-old nonprofit in Washington, DC, that offers services to about 200 homeless women and their children every year in an area with some of the highest and most stubbornly entrenched rates of homelessness in the United States.

“NEW provides housing and support services for homeless women and children. We try to serve a wide range of needs—financial needs, health needs, etc.—to help these women get stability back in their lives and, ultimately, find permanent housing,” said Tracy Frish, director of development and communications.

Raising money to address homelessness can be particularly challenging. It’s not that people don’t care, but it’s hard to stay optimistic and encourage people to keep on giving. Although only 20 percent of NEW’s annual revenue comes from individual donations, Frish has had to work hard to broaden her donor base and keep things fresh.

NEW enjoyed a recent success with a 2016 campaign based on a \$15,000 challenge grant provided by a long-time member of its board of directors who was retiring from board service. “You think: ‘This has been done, surely people are tired of this,’ but they loved it!” said Frish. “It really appeals to individual donors to have their donations matched and double their impact. We had a direct-mail audience of about 650 people and an email audience of about 450 people, with probably about a 20 percent overlap. We tried to make sure every single person opened every single communication every single time.

We were as creative as possible with our communications, and, because of that, our open rate stayed consistent throughout the campaign.”

Given her small staff and the relatively small audience of potential donors, Frish wasn’t able to do much segmentation, so she made up for it with personal, one-on-one outreach from members of the NEW board of directors. “We had 13 board members, and they all reached out to their connections. Our board was very successful recruiting new donors for us, which was critical, because only new money (a new donor, or an increase in donation from an existing donor) would be matched. We did giveaways, hosted events, offered prizes, talked up winners, and kept people updated on the progress we were making. We tried every tactic.”

That personal touch goes to the heart of NEW’s mission. The organization takes great care to humanize the women and children it serves. “People need to see themselves in the women and children we serve. We emphasize that with photos and stories of the women and their kids, which we would change out in every single email. Because what makes a difference is when people see the range of faces and experiences. That’s what drives home the point that these are people who look just like you and me,” said Frish.

So what happened?


“We got the full match, and then some, which is huge for us,” said Frish.

CASE STUDY: New Endeavors by Women Making the Most of a Challenge Grant

Now that NEW has all these new donors, how will it keep them engaged?

“That’s the million-dollar question,” said Frish. “It’s hard to know what will trigger people to actually answer a call to action. But I will say that, because we’re not huge, I get to know the donors, and that personal touch makes all the difference. Because, ultimately, people give if they believe in your cause and have a relationship with the organization.”

About New Endeavors by Women

By partnering with homeless women, NEW creates new futures. It provides a nurturing environment so that women can recognize their worth. NEW transforms lives by providing housing, fostering the development of life skills, and promoting education and employment to end the cycle of homelessness. Since opening its doors in 1988, NEW’s programs and services have helped more than 3,000 women and children take steps toward achieving greater self-sufficiency and independence. 

Relationships Are About More Than Money: Attracting Millennial Supporters

This is an area where institutions of all sorts—membership associations, charitable organizations, for-profit retailers and employers—are struggling. Millennials are the largest living generation and are projected to be 50 percent of the workforce by 2020,¹⁶ which means that understanding what motivates them to contribute to and participate in organizations is of paramount importance.

Fortunately, Achieve (in partnership with the Case Foundation) has done longitudinal research with more than 75,000 millennials over the past eight years. This research covers millennial behavior and attitudes toward causes, volunteerism, donations, corporate social responsibility, and a host of other related issues. What we'll cover below draws broadly from all their work (available at <http://www.themillennialimpact.com>), and most specifically from *Cause, Influence & the Workplace: The Millennial Impact Report Retrospective: Five Years of Trends*, released in 2016.

The first piece of data to be aware of is that, contrary to their reputation as a “selfish” or “entitled” generation, “millennials are intrinsically motivated to do good.”¹⁷

How does that desire to do good express itself? Achieve found that six particular trends surfaced consistently in its research from 2011-2016:

1. Intrinsic passion for a cause is millennials' primary motivator.
2. Millennials volunteer and give modestly to multiple causes in early engagement.
3. Among millennials, women give more money than men, and older individuals more than younger ones; larger donations correlate with higher total volunteer hours.
4. Peers are a critical influence on millennial giving.

5. Millennials want to use and develop their skills through cause engagement.
6. Millennials learn about and donate to causes digitally, using each platform distinctly.¹⁸

We want to highlight a few of these trends and talk about how fundraising organizations are leveraging them and how associations can do the same.

Focus on the Mission

The overwhelming majority of millennials choose where to contribute (whether financially or otherwise) because they find the cause compelling. A big piece of that is seeing and understanding the impact of their contributions. As noted previously in the Creating Compelling Campaigns section, charitable organizations have long honed their skill in telling stories that illustrate impact and make the donor (or volunteer) the hero.

This is an area where associations lag. Too many membership organization appeals are focused on “the good of the order” or the internal needs of the association itself rather than on the member and what she contributes to—and needs from—the membership relationship. (For more on this, see the Spark/The Demand Networks whitepaper *Leading Engagement from the Outside-In*, <http://bit.ly/1GPNUM6>.)

Appealing to institutional needs, wants, goals, and outcomes is a nonstarter with young professionals. Your association's needs and goals do not motivate people, particularly not millennials. They are interested in issues and causes, and how those affect real people, not in supporting institutions *qua* institutions.

16. *Cause, Influence & the Workplace: The Millennial Impact Report Retrospective: Five Years of Trends*, pg. 1

17. *Cause, Influence & the Workplace: The Millennial Impact Report Retrospective: Five Years of Trends*, pg. 11

18. *Cause, Influence & the Workplace: The Millennial Impact Report Retrospective: Five Years of Trends*, pg. iv

“Your association’s needs and goals do not motivate people, particularly not millennials.”

Associations must start measuring outputs (impact and results) rather than inputs (effort and resources) and reporting on them in ways that center members as the protagonists in their tales. Perhaps the most famous commercial example of this is Nike’s transition to “Just Do It” as its slogan and foundation myth nearly 30 years ago. The story changed from “we sell running shoes” to personal empowerment, with Nike as your partner, but not your savior.

Associations can use all sorts of storytelling mechanisms to create that emotional connection around mission: three act, five act, before/after, problem/solution, the “magic formula,” even Joseph Campbell’s “Hero’s Journey” (better known in pop culture as the Star Wars story arc).¹⁹ The key is to make the connection to something your young professional prospects and members care about deeply and show how, facilitated by your association, they can make a difference.

Keep Your Expectations in Check

One thing to remember about young professionals is that they’re *young*. They may still be paying off school debt. They’re likely in entry-level or junior positions, which means they have less disposable income and less control over their schedules to devote time to volunteering. They may still be saving up for major life events or purchases, like getting married, having kids, or buying their first house.

Because of that, they’re still not really donating in large numbers. While millennials make up more than 30 percent of the population, they only represent 7 percent of the donor population.²⁰ According to Achieve, they also tend to support more than one organization at a time, which means when they give, they give modestly, mostly in amounts under \$150.

However, millennials are nearly as likely to volunteer with organizations they believe in as they are to give, and, in fact, their donating and volunteering tend to go hand in hand, as mentioned before: “larger donations correlate with higher total volunteer hours.”

Innovative fundraising organizations are focusing their resources on cultivating volunteer relationships as much as, if not more than, donor relationships with younger generations. That’s not to say that they don’t want or need donations from their younger audiences. But they’ve realized that, while many young professionals can’t contribute much (or even at all) financially, they have much to offer by way of non-financial contributions, through which wise charitable organizations can build authentic, loyal, long-term, mutually beneficial relationships that will some day result in substantial financial contributions.

Associations, however, tend to erect membership as a primary barrier to entry: If someone isn’t a paying member, he isn’t welcome. Associations require a financial contribution first, and then the opportunities for non-financial contributions to the good of the industry or profession (or organization) open up. Is there a way your association can flip that script? We’re not advocating that you give away the store: Your highest-value membership benefits should rightly be reserved for paying members. But we urge membership organizations to begin thinking more broadly about what constitutes “the community this association serves,” create alternate entry points to belonging, and appropriately value both the financial and non-financial contributions your community members make.

19. <https://blog.bufferapp.com/storytelling-formulas>

20. *5th Annual Charitable Giving Report: How Nonprofit Fundraising Performed in 2016*, pg. 14

Create Personal Connections

Given the historical events of their formative years (terrorist attacks, the Great Recession, the global economic instability that's followed), millennials have a lowered level of trust in institutions. They also have much closer continuing relationships with their parents than the two prior generations. Because of these factors, millennials frequently choose where to contribute, financially or with time and skills, based on the recommendations of their family and friends. Their word of mouth becomes your stamp of approval.

This presents a bit of a challenge for membership organizations. Unless your mom is also, for instance, a chartered financial analyst, she's unlikely to tell you that you need to join the CFA Institute and its local society in Minnesota. Membership organizations have always relied on employer-to-employee or colleague-to-colleague word of mouth for recruitment, but, with the generation that will soon represent the majority of the U.S. workforce, it is even more important to locate your passionate fans and give them the tools they need to share your story with other prospective members. (See the "Three Keys to Winning Campaigns: An Interview with Shonali Burke" sidebar on page 8 for more information on how to do this.)

The benefit to this approach is that millennials are as eager to make recommendations as they are to ask for them. If they care about your mission, they are likely willing to promote your organization to their friends and colleagues. So, again, make sure you're providing them with the tools to do so. This needs to go beyond the traditional Member-Get-a-Member campaign. Remember, passion for the cause is key. Help them articulate the good your association is doing to advance a mission that matters and how their contributions are critical to that progress.

"Your prospective audiences are not the 'damsel in distress,' and you are not the prince who will slay the dragon. This is a partnership."

Millennials are also eager to build their professional skills and networks. This is partially a factor of life stage rather than generation: as people who are still relatively early in their work lives, they're in the process of forming the relationships and acquiring the knowledge that will support their entire careers. But today's young professionals face unique challenges. More people have more, and more advanced, degrees than ever before in U.S. history, which makes differentiating oneself in the job market a challenge. And millennials began entering the work force in large numbers during the worst recession in nearly 80 years, making well-paying entry-level jobs a scarce commodity.

This is a situation in which associations have an enormous advantage. Associations are organized around professions and industries, not social causes. Professional development and networking are foundational reasons associations exist in the first place. These can be tremendous selling points for involvement in professional societies, but remember the lesson of good storytelling: Your prospective audiences are not the "damsel in distress," and you are not the prince who will slay the dragon. This is a partnership.

One final point on millennials and personal connections: as the Millennial Impact reports detail, if you want to engage millennials, create opportunities for them to contribute in groups. Unlike their notably prickly and independent generation-X elders (motto: "I can do it myself!"), millennials have been raised to work in teams. They are more likely to volunteer or give if it's done in a community setting: participating in a food-drive contest at the office, recruiting a group of friends to do a Special Olympics New Year's Day polar plunge, joining a Leukemia and Lymphoma Society Team in Training to raise money while training for and running a half marathon, putting together an unofficial late night dance party at your annual meeting (like the infamous YAP parties that took place at the ASAE Annual Meeting for several years), or doing a service project with a local charity in your annual conference's host city. Create ways for them to contribute together.

Be Instagrammable

Millennials are the first generation of digital natives—that is, people who grew up surrounded by digital technologies and for whom those technologies are as “natural” as the telephone, radio, or TV are to their elders—and their lives are mediated by those technologies to a degree that’s almost unimaginable for previous generations. To cite only one stat from *Cause, Influence & the Workplace: The Millennial Impact Report Retrospective: Five Years of Trends*, 67 percent of the 75,000 millennials surveyed interact with their preferred causes on Facebook, and 74 percent do that primarily by sharing information about “cool events.”²¹

This has at least two implications for nonprofits. One, your organization needs to be Instagrammable; and, two, you may have to start thinking a bit differently about what constitutes being actively engaged.

Millennials are strongly motivated by fun, cool events that they can share on their social platforms. Now, let’s back up: Everyone is motivated by fun. But the generation that gave us FOMO (“fear of missing out”) and has turned carefully curated and widely followed Instagram accounts into lucrative product-placement businesses is particularly drawn to sharing fun, cool things that photograph well online and wanting to participate in the fun, cool, photogenic things their friends share.

Two arts organizations in Washington, DC, have nailed this concept.

Museums traditionally forbid photography of their installations. They’re protecting intellectual property. They want people to pay to come to the museum rather than seeing poor quality amateur shots of the collection online. Flash photography can damage some types of art over time. In late 2015, after being closed for two years for renovations, the Smithsonian Institution’s Renwick

Gallery reopened with the immersive Wonder exhibit, featuring large-scale installations from nine different contemporary artists. Not only did the Renwick not forbid photography; it actively encouraged it, providing suggested tags for various social platforms. The exhibit lasted for eight months, and the buzz created on social media by all the widely shared images generated a true “must-visit” environment, in which lines to get in routinely stretched around the block.

Public libraries are not generally considered to be hip, happening spaces. Yet the DC Public Library’s annual “Uncensored” fundraiser, held at the end of September’s “banned book month” celebration, regularly sells out. DCPL generates attention with a month-long, social- and traditional-media-assisted, city-wide banned book scavenger hunt. The benefit itself is frequently held in an “edgy” space (2017’s edition was in the abandoned trolley tunnels of the Dupont Underground arts project), and it features multimedia and graffiti art, signature cocktails created for the event from some of DC’s hippest bars, performances by local bands, and “Made in DC” products by local small businesses. Again, it’s an event that provides fantastic photographic opportunities, for which DCPL helpfully provides suggested social tags. The crowd that attends skews about 30 years younger than that at most other arts benefits in town.

Membership organizations tend to focus heavily on content, whether that be for conferences, publications, virtual events, professional development, networking events, social media communications, or other means of interacting with the audiences you serve. Content is important. But in an increasingly visual age of shortened attention spans, ubiquitous live video, and widespread social sharing, associations also need to think about what all those events and communications look like and how to convey your mission in compelling visual ways. You want to stay true to your brand—you’re a group of accountants (or nurses, or engineers, or teachers), not dubstep DJs—but lighten up and think visually.

21. *Cause, Influence & the Workplace: The Millennial Impact Report Retrospective: Five Years of Trends*, pg.10

Embrace Slacktivism

Although, as we've seen, millennials are strongly motivated by the desire to do good, Achieve also reports: "Millennials still consider themselves activists, but without showing a strong affinity for direct action in support of or opposition to an issue."²² That is, while Millennials are highly likely to share information about your mission on their social platforms as a show of support, they're not really an "out of the closets and into the streets!" cohort. The term for this is slacktivism.

For charitable organizations that are dependent on direct action—volunteers who are willing to march or protest or phone bank or knock on doors—this can be a serious problem.

Even for associations, which aren't really "into the streets!" cohorts either, slacktivism can present challenges to traditional volunteer structures, which are organized around a board of directors and standing committees that require significant commitments of time.

Engaging millennial volunteers requires organizations to think differently about what an "engaged volunteer" is and does. Innovative associations are shifting away from large numbers of standing committees and rigid volunteer engagement paths to a more fluid understanding of the "volunteer continuum" and ad hoc, micro, virtual, and episodic volunteer opportunities. For more on this topic, see the Spark/Mariner Management white paper *The Mission Driven Volunteer* (<http://bit.ly/13Wwe1F>) and Peggy's Hoffman's "Going Guerilla" worksheet (http://www.marinermanagement.com/files/docs/guerrilla_volunteering_worksheet.pdf). 🌟

22. *Cause, Influence & the Workplace: The Millennial Impact Report Retrospective: Five Years of Trends*, pg.13

CASE STUDY:

Capital Area Food Bank

Future-Focused Relationship Building

“Look at how people already connecting—online and in real life—and meet them where they are.”

Hilary Salmon, Director of Communications

The Capital Area Food Bank (CAFB), one of the most well-regarded nonprofits in the Washington, DC, metro region, has not only retained long-term volunteers; it also enjoys a rare high engagement rate with millennials in a notoriously transient area.

“Research and our own experience at the food bank have taught us that many millennials are motivated from a place of conscience, and, for them, food justice and access are components of an overall commitment to social justice. Environmental issues—food waste, the diverting of food from landfills—are issues that our organization plays a key role in and that are important to many in this generation,” said Hilary Salmon, director of communications.

In building relationships with the community that lead to support for the food bank’s work, CAFB has realized that it’s key to meet people, young and old, where they are. “Younger people are often more able to give time than money. CAFB works with more than 26,000 volunteers a year, and volunteerism is frequently our first point of engagement with people,” said Salmon. For young people in particular, volunteering can provide a sense of community. “We hear a lot about how young people coming to the ‘big city’ feel like they have no community,” said Salmon. “If we can provide that, that’s a good thing. Everyone wins if we create a community around a common cause.”

The food bank also considers different audiences and ages when planning events. “Younger people aren’t always able to go to an expensive gala, but they may come to less formal, less expensive events. And so we hold a lot of

events throughout the year, some big, some small.” Salmon offered up some examples: “A fall garden happy hour, a spring food-truck event, movie screenings on food waste. Our smaller or lower-cost events often appeal to the interests of a younger demographic.”

Where do they come up with all these creative ideas?

“It helps that half of our 130 staff members are in this demographic, and they share their thoughts about what millennials care about and are interested in participating in. Which means we have terrific in-house research,” said Salmon.


Millennials also play an important role as social media ambassadors for the CAFB. Given that the food bank works primarily through its broad network of 444 nonprofit community partners, it can be challenging to demonstrate the full extent of the role CAFB plays for individuals or the range of services it provides. Enter social media and its many millennial users, whom the food bank empowers to spread awareness about the issue of hunger in the community and its work addressing that need.

“This is a profoundly media-savvy generation. Our job is to provide interesting and engaging content that our social media followers will want to share. We focus on interesting stories, news, or events—for example, highlighting a walk that’s raising awareness about food deserts in DC’s Ward 8 and the need for affordable, accessible retail food access. It has to be more than dry facts,” said Salmon.

“For all donors and volunteers, the organization’s value proposition has to be clear and truly compelling. This is particularly true for a group of people who can connect easily online at any time, has a lot of choices when it comes to investing their time, and needs a good reason to do more than click a button. Many younger people have an appetite for advocacy and activism. They want to build community and network, and they want to understand the immediate impact of their contributions,” said Salmon.

“We need food, funds, and friends to do our work. In other words, we need many kinds of engagement,” Salmon said. This goes to the heart of CAFB’s success engaging young people. Salmon stressed the importance of meeting people where they are, not where you want them to be. “We value all kinds of engagement, because people contribute how and when they can. People can volunteer in lots of ways; they can attend our annual gala; they can attend our less formal, less expensive events; they can donate. We provide diverse ways to engage so that people can stay with us as their available time and financial resources change,” said Salmon. “Our goal is to provide many different ways for people to contribute throughout the full spectrum of their lives.”

About the Capital Area Food Bank

The Capital Area Food Bank is the largest organization in the Washington, DC, metro area working to solve hunger and its companion problems: chronic undernutrition, heart disease, and obesity. By partnering with 444 community organizations in the District of Columbia, Maryland, and Virginia, as well as delivering food directly into hard-to-reach areas, the CAFB helps 540,000 people each year get access to good, healthy food. That’s 12 percent of the region’s mothers, fathers, sons, daughters, sisters, brothers, and grandparents. 

CASE STUDY: CFA Society Minnesota Creating Real Connections with Young Professionals

“Be real with your members. People like personal connections. That’s what keeps them coming back.”

Diane Senjem, Member Services Manager

The CFA Society Minnesota (CFAMN), one of more than 140 local chapters of the CFA Institute, has had significant success with its membership program. Although chapter membership is not required for CFA Institute members, CFAMN has recruited the vast majority of chartered financial analysts in the tri-state area it serves, and it enjoys a renewal rate north of 94 percent annually. It has been particularly successful recruiting and retaining young professionals, generally capturing them as soon as they earn CFA status.

The CFA is the gold-standard credential for institutional investment profession, with potential candidates most frequently learning about it through word of mouth from other charterholders. “Our job is to connect with candidates during the exam process [a three-exam series that takes multiple years to complete], and, in turn, connect them with the local investment community that can be a support network for them during the exam process and as they’re landing their first jobs,” said Diane Senjem, member services manager.

That process starts with relationship building at the college and university level. CFAMN volunteers and staff work to build relationships with faculty and students, and they visit campuses throughout the year to make presentations about the charter—what it involves, how individuals earn it, how it benefits investment professionals—and make connections for internships.

“Our members are so willing to share their expertise, particularly with young people entering the field. I have yet to hear a ‘no’ when I ask a member if she’d be willing to talk to a person who’s interested in the segment of the industry where she works, who needs a mentor, who’s looking for help with a project or with understanding the industry,” said Senjem.

“I’m a boomer, and I remember when I got started in my career; it was just sort of expected that you would join your association,” said Mark Salter, executive director. “One thing we’ve realized is that it’s important not to push too hard too early. Millennials don’t necessarily want to join organizations just to join them. They often want more episodic involvement early in their careers, and we try to recognize that in our programs, products, and services and in our expectations.”

The CFAMN staff learns through creating and maintaining ongoing authentic relationships with their members. “We are constantly actively soliciting feedback from our members, and we also listen strategically when we’re around them. That allows us to produce events that appeal to their naturally inquisitive natures and their commitment to lifelong learning. We are always working to get to know our members better: who they are, where they work, what will advance their careers, what their goals are, and how we can help them advance and achieve their goals,” said Senjem.

CASE STUDY: CFA Society Minnesota Creating Real Connections with Young Professionals

“Although our staff members are, first and foremost, association professionals, we’ve also taken the time to learn about the industry. The CFA Institute offers a certificate program for non-CFAs that covers a small subset of what they learn to sit for the exams but that also really helps non-CFAs understand the charterholders and their work better. All of our staff members have taken it,” said Salter. “If the profession or industry your association serves offers anything like that, I highly recommend doing it. It has really resonated with our members, for them to see that we’ve all taken that level of interest in their profession.”

One of the biggest challenges CFAMN faces is social media, specifically LinkedIn. “One of our key goals is helping our young professionals understand that belonging to LinkedIn is not the same as being a member of CFAMN. Building the professional network that will be there to support you when you need it requires more than just giving an email address and professional history,” said Salter.

“People are looking for deeper connections than just knowing a person’s name and where they work,” added Senjem. “We take seriously our responsibility to help young professionals understand what it means to build those genuine relationships that will form the foundation of their career success.”

A big part of that is giving the staff the permission to be real with members. “One of our staff members recently had twins, and when we shared a picture of them in our e-newsletter, it ‘blew up.’ It was our most read and shared e-newsletter ever. People like personal connections. That’s what keeps them coming back,” said Senjem.

About CFA Society Minnesota

CFA Society Minnesota is the premier professional organization for investment professionals in the Twin Cities and throughout the Upper Midwest region: the place to connect with CFA charterholders. With more than 1,350 members throughout the region and across a broad scope of firms, CFAMN strives to serve charterholders through relevant educational programming, career resources, membership support, networking, and leadership opportunities.

Conclusion: Don't Be Complacent

One of the down sides of the relatively cooperative and collaborative environment in which association professionals operate is that the lack of competition can lead to complacency.

Many associations reward novelty more highly than loyalty. Many don't, beyond their board of directors, make their most involved and dedicated members feel special. Many "set it and forget it" when it comes to campaigns. Many have not yet figured out how to attract the younger generation of professionals.

And yet, for the most part, the industry isn't suffering severe consequences. According to the 2017 edition of Marketing General's *Membership Marketing Benchmarking Report*, nearly half of associations surveyed reported increased membership in the past year, and an additional quarter held steady.²³ Membership organizations enjoy renewal rates around 80 percent—four out of five members chose to stay with the organization.²⁴ Participation in public and private social networks, attendance at virtual and in-person events, and enrollment in credentialing programs remains robust.²⁵

It's easy to get lazy.

We urge you and your team not to, though. Although they've delayed a bit for both financial and increased-longevity reasons, baby boomers will eventually retire. Gen X is a much smaller cohort. Millennials, having graduated at the height of the Great Recession and often with significant school debt, are running behind where their elders were in their careers at the same ages. Younger generations have different expectations about organizations' use of technology and technological sophistication. They are accustomed to personalized, customized experiences. Even the shiniest of golden-handcuff certifications, accreditations, or licenses can be swiftly unlocked by the

“Even the shiniest of golden-handcuff certifications, accreditations, or licenses can be swiftly unlocked by the right for-profit challenger launching a competing product.”

right for-profit challenger launching a competing product. Open access is disrupting peer-reviewed journals and the significant revenue they've historically generated for their publishers. Companies are beginning to question the value of sending large teams to stand around in a 20x20 booth for two days at trade shows.

In other words, the association industry's operating landscape is shifting rapidly and in unpredictable ways. Association executives don't have all the answers.

That's why it's important, at least at times, to turn outside the industry to see what other organizations are doing to attract audiences, particularly younger audiences; to build relationships with those audiences on their terms, not the organization's terms; and to recognize their contributions equitably and make people feel known, heard, special, and appreciated.

Fundraisers can do it, and so can you. To slightly misquote *The Power of Giving* author Harvey McKinnon: “[Member] loyalty is not about the [member] being loyal to you, it is you being loyal to the [member].” Or, as Bluefrog Fundraising Managing Partner Mark Phillips puts it: “The only thing that matters a damn is the [member] experience.”²⁶ We hope that what you've learned through reading this white paper will inspire you to go out and create some great experiences for your most loyal members. ✨

23. 2017 *Membership Marketing Benchmarking Report*, pg. 3

24. 2017 *Membership Marketing Benchmarking Report*, pg. 4

25. 2017 *Membership Marketing Benchmarking Report*, pg. 8

26. <http://101fundraising.org/2014/02/25-awesome-fundraising-quotes/>

BONUS Idea to Steal: Self-Care Matters!

By Beth Kanter, master trainer and nonprofit innovator

Editor's note: Nonprofit professionals of all stripes get burned out. In *The Happy Healthy Nonprofit: Strategies for Impact without Burnout* (<http://bit.ly/happyhealthynpbook>), Beth Kanter and Aliza Sherman provide strategies to help prevent and cope with burnout. This sidebar is adapted from that book.

It's totally normal to feel super exhausted after a particularly rough day—but if every day is starting to feel rough, you might be close to burning out.

The clinical definition of burnout is “a state of emotional, mental, and physical exhaustion that occurs when we feel overwhelmed by too many demands, too few resources, and too little recovery time.” The challenging working environment for nonprofits creates ideal conditions for burnout to occur.²⁷

The good news is that once you know the signs of burnout, you can take steps to stop it.

Warning sign #1: You're feeling weary and small things are starting to really (really) irritate you.

Burnout can sneak up on you, and the first sign is a short fuse. Maybe every little thing about a donor, a board member, or your executive director is rubbing you the wrong way. Your executive team's expectations are way out of whack, and you just don't have the energy to politely set them straight. The WiFi is on the fritz again, and it feels like the end of the world.

Every job includes some annoyances, but if you feel at wit's end before you've even finished your first cup of coffee, you might be at risk for burnout. Left unchecked, this can devolve into angry outbursts and serious arguments both at home and at work.

Self-care solution: Get more sleep, even if it means taking a 20-minute nap under your desk.

Sleep deprivation messes with your concentration, mood, and ability to cope. To get more sleep at home, stop trying to cram in one more email before bed and avoid staring at screens before you hit the hay.

But don't limit your shut-eye to your bed. Sleep in the workplace may seem like an oxymoron, but studies show that napping during the day can improve mood, memory, and cognitive functioning, leading to greater productivity at work.²⁸

Yes, some professionals actually curl up under their desks for a catnap. Better yet, show your HR department the data on increased productivity from a well-rested staff and ask them about creating a meditation or nap room.

Warning sign #2: You can't seem to concentrate on anything and your productivity is suffering.

When you're overworked and overstressed, it affects your concentration: Your mind wanders, you forget things easily, you can't focus.

Self-care solution: Stand up and walk around to clear your mind.

If you're having trouble focusing, you may be suffering from “foggy brain” caused by too much sitting. Multiple studies²⁹ have clearly demonstrated that a 20-minute walk can significantly improve your ability to concentrate, especially if that walk includes green space.

27. <https://www.theatlantic.com/business/archive/2016/08/the-plight-of-the-overworked-nonprofit-employee/497081/>

28. <http://www.mayoclinic.org/healthy-lifestyle/adult-health/in-depth/napping/art-20048319>

29. <https://www.scientificamerican.com/article/mental-downtime/>

BONUS Idea to Steal: Self-Care Matters!

So stop using your computer keyboard as a lunch tray. Instead, incorporate a brain-replenishing walk into your lunch routine. Don't think of taking a walk as slacking. It's a tool that will improve your productivity and ability to think creatively.

Warning sign #3: You're feeling sluggish throughout your day, even when you get plenty of sleep.

Your energy dips at work more often than the common post-lunch crash. You feel physically and emotionally exhausted. You might go to bed early only to wake up still feeling tired, or you might find it difficult to get out of bed at all. Your fatigue only adds to your anxiety about all the work you need to get done in a given day.

Self-care solution: Stick to nutritious foods and beverages and avoid the temptation of empty calories.

What we eat and drink can impact how our bodies and brains work. There's a reason why nutritious food is called "brain food," and it can mean the difference between being strong, clear-headed, and effective or being sluggish, dull, and slow.

At home, you may be successful at avoiding sugary snacks because you don't buy them. But, at work, the chocolate-covered donuts in the conference room may be nearly impossible to resist. You need a plan to stick to your nutritional goals at the office. The American Heart Association's Healthy Workplace Food and Beverage Toolkit³⁰ is a good place to start.

Warning sign #4: You're feeling compelled to overwork because you think it's the only way to get everything done.

Working in a mission-driven organization means that you may find yourself working after hours and on weekends because you have a real passion for your cause.

However, that passion can be a double-edged sword. On the one hand, it helps you keep going in the face of the difficult challenges nonprofits face. On the other hand, you can become so driven you don't even notice your work is starting to take a toll on your overall health and wellbeing.

Self-care solution: Give yourself a break—when you work too much, you're not getting much done.

Sometimes our reaction to stress is to work nights and weekends, not take breaks throughout the day, or sacrifice vacation days. Not only does this behavior lead to burnout over the long term, but working longer hours has also been shown to decrease productivity even in the short term.³¹

So use your vacation time, and take real vacations, where you completely disconnect from work, email, and your "electronic leash" mobile devices. If you give your brain a chance to rest, you'll return to work with more clarity and perspective that will serve both you and your organization far better than staying late at the office.

The bottom line: Self-care isn't a luxury—it's the key to being productive at work. When you are overworked and overstressed, you cannot perform at the top of your game. Taking better care of yourself is critical to achieving your organization's mission. 🌟

30. http://www.heart.org/HEARTORG/HealthyLiving/WorkplaceHealth/EmployerResources/Healthy-Workplace-Food-and-Beverage-Toolkit_UCM_465195_Article.jsp

31. <https://cs.stanford.edu/people/eroberts/cs201/projects/crunchmode/econ-hours-productivity.html>

Questions for Reflection

- Crowdsourcing is disrupting the fundraising industry. Do you think it's going to affect the association industry? How?
- What does your association provide that can't be done nearly as well by crowdsourcing? How can you use that to your competitive advantage?
- What steps can you take to expose yourself and your team to innovative ideas outside the association industry on a regular basis?
- Do you know who your most engaged members are? What are you doing to cultivate those relationships? What steps are you taking to learn what matters most to them?
- Did your most recent campaign (renewal, registration, new product launch) meet your expectations? If not, which of the areas identified above might you focus on to improve your outcomes next time?
- What steps can you take to capture what you learn from campaigns you run so that you can improve future campaigns? Who (else) should you include in those conversations?
- What's the most exciting, memorable, or persuasive campaign you've seen recently? What ideas could you steal from it to make your next campaign more effective?
- What outstanding association marketer should you add to your professional network? How will you begin building a relationship with that person?
- How can you lower the bar to entry in your association for young professionals? What low-cost or free opportunities can you create to join and participate in your community?
- What non-financial contributions are people making to your association? How can you best recognize and reward those contributions? What can you do to clearly demonstrate the impact of those contributions?
- How can you reframe your association's story to make your members the heroes? What tools can you provide to them to empower them to tell your story for you?
- How can you inject an appropriate level of fun into your association's programs, products, and services?
- What's one action you can take this week to make your most engaged members feel special?
- What's one action you can take this week to improve your next campaign?
- What's one action you can take this week to begin building relationships with the next generation in your profession or industry?

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About Sohini Baliga

Sohini Baliga has worked in the nonprofit world since 1999 and has focused on marketing, communications, and development since 2002. She has worked in large, established, well-funded organizations as well as small, scrappy startups. In organizations large and small, she has seen the value of relationship building and storytelling to help grow communities and cultivate donors.

After a decade of consulting for a variety of nonprofit clients, Sohini recently closed down her successful practice to join Taxpayers for Common Sense, a nonpartisan budget watchdog in Washington, DC. She serves as their director of communications. She also serves as executive director of the Vienna Choral Society, the “joy project” and sole client she retained from her consulting business.

About Elizabeth Weaver Engel

Elizabeth Weaver Engel, M.A., CAE, CEO and chief strategist at Spark Consulting LLC, has more than 20 years of experience in association management. Although her primary focus has been in membership, marketing, and communications, her work has been wide-ranging, including corporate sponsorship and fundraising, technology planning and implementation, social media and internet strategy, budgeting, volunteer management, publications, and governance.

Spark provides strategic membership and marketing advice and assistance to associations that have the willingness and capacity at both the staff and board levels to ask themselves tough questions and take some risks in service of reaching for big goals. Forget settling for incremental growth by making minor changes to what you're doing—we're going to uncover and solve the root problems that are holding your association back!

Elizabeth combines a focus on asking the right questions and finding and implementing creative solutions with a broad understanding of the association sphere. Throughout her career, she has excelled at increasing membership, revenue, public presence, and member satisfaction while decreasing costs through a focus on the efficient and effective use of data, staff, and technology to serve organizational goals and constituents.

Prior to launching Spark, Elizabeth consulted in online campaigns and marketing and internet and social media strategy for Beaconfire Consulting and in a wide range of subject areas in association management in the not-for-profit consulting practice at RSM McGladrey, Inc. She has also served associations directly in a variety of positions, including director of member services and IT, director of marketing and sponsorship, vice president of marketing, and acting CEO.

Elizabeth is a certified association executive (CAE) and holds a master's degree in government and foreign affairs from the University of Virginia.