Membership Fundamentals:
Building Blocks of Membership

Alliance for Biking and Walking
October 3, 2012

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Member Surveys

- Who are your members? (And, who aren’t your members?)
- What do your members care about?
- What do your members want from their membership?

Basics:
Let your members know the survey is coming and why their participation.
Reinforce participation with additional communications.
The survey should only be open for about a week.
Free survey services work great for getting started, but for deeper analysis, a survey service is recommended.
Keep it short!
Ask the easy questions first, and the hard questions at the end.
Always include demographics at the end and make a note in the survey before you ask the demographic questions why this personal information is critical.
Require all questions in the survey be asked & answered, except demographics.
Be inclusive!
Test, test, and retest your survey BEFORE sending it out. You can’t fix broken questions or flow once your survey has been launched.
Offer an incentive for participating in the survey.
Report your findings.
Ask the same questions with the same wording from year to year to compare data.
Surveys are never perfect, so don’t assume the data is either.

Goals:
Membership Marketing
Advocacy Projects & Priorities
Membership Benefits

Dig Deeper: Segmenting

Are their groups of members who think differently, have other priorities?
- Longtime supporters vs. Recent members
- Major donors vs. Standard memberships

Survey questions used in the SFBC Member Survey:

1. Approximately how long have you been an SFBC member?
2. How often do you ride a bicycle for transportation in San Francisco?
3. How often do you use your bike for recreational rides?
4. If you take your bike on public transit, on which of the following do you take your bike?
5. Do you bike to work?
6. What is the main reason you do not bike to work?
7. Do you have secure bicycle parking at work (or at school if you are a student)***
8. Why don’t you have bike parking at work?
9. Do you belong to a recreational riding group?*
10. If you bike with children what types of trips do you take by bike?*
11. Below are a number of reasons why people join the SFBC. Please rate how important each was to your decision to join.
12. If there were reasons, other than those above, why you joined the SFBC, please specify.
13. Please rate your satisfaction with the SFBC’s performance in the following areas of SFBC Member Services.
   - Representing the bicycling community
   - Providing news and information about SFBC campaigns and bicycling in San Francisco
   - Educating bicyclists and providing safety information
   - Providing members with opportunities to be a part of the SF bicycle movement to improve and promote cycling
   - Providing valuable membership perks (such as map, discounts, free trailer, bike box rentals)
   - Hosting social events and SFBC parties
14. If there are other areas of SFBC Member Services that are important to you, but not listed above, please specify.
15. Please rate how important each of the following issues is, in your opinion, for better bicycling in San Francisco.
   - Completion of the Citywide Bike Network (increasing the number of bike lanes and bike facilities including safe and convenient connections to regional transit, colored bike lanes, bike parking, and Sharrow--shared lane indicated in the street by painted stencils)
   - Secure bike parking and addressing bike theft
   - Bike route signage
   - Car-free space to promote bicycling, particularly for children
   - Bicyclist education
   - Motorist education
   - Quality of pavement
   - Bike access on the Bay Bridge
   - Bike access on public transit vehicles
   - Increasing number of people cycling on city streets as a means to improve safety
   - Awareness of bicyclists' issues among SF decision makers and politicians
   - Image of cyclists among public (via media and outreach)
   - Improving the livability of our streets
16. If there are other cycling-related issues that are important to you but not listed above, please specify.
17. Please rate your satisfaction with the SFBC’s performance in addressing each of these issues. (Same choices as #15, same order, same wording)
18. How would you characterize the changes in San Francisco bicycling during the past time periods?
   Past 1-2 years
   Past 3-5 years
   Past 6-10 years
19. On average, how safe do you feel bicycle riding is in San Francisco?
20. How often do you use your SFBC membership card for discounts?
21. Which of the following discounts would you find most valuable as an SFBC member discount? (Check all that apply.)
22. Do you use the free valet bike parking service provided by the SFBC at outdoor community events and the ballpark?
23. How often do you read each of the following?
   - Biker Bulletin, SFBC's weekly email newsletter
   - Tube Times, SFBC’s semi-monthly printed newsletter
   - SFBC’s special emails on specific issues
   - SFBC’s updates via snail mail
   - sfbike.org, SFBC's website
24. Which of the following SFBC events have you attended within the last year? (Check all that apply.)
   - Winterfest
   - Golden Wheel
   - Tour de Fat
   - Volunteer Nights
   - Love on Wheels
   - Bike Away from Work Party
   - Family Day
   - Public hearings for SFBC campaigns
   - Community meetings for bike and transportation issues
   - Campaign meetings
   - New Member Meet-and-Greets
   - Outreach Training
   - Volunteer Appreciation Party
   - None of the above
25. Please indicate which, if any, of the following ways you have contributed financially to the SFBC beyond your membership dues. (Check all that apply.)
   - Workplace charitable giving
   - Car donation
   - Community Thrift donation
   - Planned estate giving
   - United Way
   - Monthly giving through a credit or debit card
   - Gift memberships for friends and family
   - Stock donation
   - End of Year special fund raiser
26. Including your membership dues, at what level do you give annually to the SFBC? (See benchmarking report for levels)
27. Were you aware that the SFBC has a tax-deductible donation option through our SFBC Education Fund?
28. In what capacity have you volunteered for the SFBC in the past year? (Check all that apply.)***
   - Weekday office help
   - At Volunteer Night/Tube Times Folding Party
   - As a Lane Steward
   - At an event
   - As a bike valet
   - Doing SFBC outreach
   - Taking photographs
   - Helping with Tube Times writing or layout
   - Distributing fliers, poster, and/or newsletters
   - I haven’t volunteered for the SFBC in the past year
   - Other, please specify
29. Do you plan on renewing your SFBC membership when it expires?
30. In your opinion, which are the reasons that bicyclists you know are not SFBC members? (Check all that apply.) They...
   - Do not wish to pay membership dues
   - Are recreational riders only
   - Don’t know about the SFBC
   - Don’t understand what the SFBC does
   - Don’t feel like the SFBC represents them
   - Don’t agree with SFBC’s mission and politics
   - Don’t think they will benefit from being an SFBC member. (Was "SFBC Benefits aren't enough/don't suit them")
   - Just haven’t gotten around to it
   - Other, please specify

Your responses to the last 13 questions will help the SFBC assess the diversity of our coalition, identify trends, and secure funding through grants. Responses are strictly confidential and anonymous and will not be used to identify you personally in any way.
31. What is your zip code?
32. What is your gender?
33. Which of the following categories includes your age?
34. What is the highest level of education you’ve completed?
35. How often do you use the following sources to get San Francisco news?
36. Do you get San Francisco news from blogs more than once a month?
37. Please list any additional news sources where you get San Francisco news that were not listed above.
38. Please select the range below that best describes your individual annual income?
39. With which ethnicities do you most strongly identify? (Check all that apply.)
40. Are you a member of any of these other membership organizations? (Check all that apply.)
   - Art museum
   - Science museum
   - Sierra Club
   - Sports club/gym
   - Local CSA (Community Supported Agriculture)
   - Faith-based organization
   - Other local/national bicycle advocacy group
   - Other environmental advocacy group
   - Chamber of Commerce
   - SPUR
   - Professional organization (AIA, AIGA, AMA, etc.)
   - Other, please specify
41. Do you own or rent the place in which you live?
42. Which of the following best describes your current employment status?
43. Do you have children under the age of 18 living in your household?
44. Do you own a car?

Thank you for taking the time to complete the SFBC’s Member Survey. Members like you make our organization great! (Optional) Please provide your email address so that we can contact you if you win the SFBC "goodie bag" for participating in this survey. Your email address will only be used for that purpose.
Tips for Membership Surveys

Only ask for information you can truly put to good use.
Explain why respondents’ answers will make a difference to your group’s success.

Consider how you will analyze the survey as you develop it.
Multiple-choice vs. fill-in-the-blank
Comparable data elsewhere?
Try to keep your questionnaire to two pages.

Segment your members:
Do your members differ in their priorities or motivations by length of membership, rural/urban, East/West, level of activism, giving levels?

Consider including the following questions in your survey:

♦ Why do you support [your organization]?

♦ Please circle our three program areas that are most important to you:
  (List specific programs, as you have referred to them in annual report, newsletter, etc.)
  Which of these are most important to you?

♦ What, to you, is the greatest benefit of membership in [your organization]?

♦ Would you recommend membership in [your organization] to a friend or neighbor and why?

♦ How many adults live in your household? How many children under 18?

♦ How long have you lived in [your community or state]? [provide ranges]

♦ Are you ☐ retired, ☐ working part time, ☐ working fulltime, ☐ looking for work, ☐ student, ☐ fulltime homemaker, ☐ other ________________?

♦ Which three values or qualities do you feel best describe [your organization], as you see it flourishing in the years ahead? Pick specifics for this list from values like these:
  Local/Regional   Innovative   Credible
  Thoroughly understands complex issues   Experienced
  Trustworthy   Honest and ethical   Watchdog
  Builds bridges to bring people together   Cooperative
  Responsive   Aggressive   Educating
  Friendly   Knowledgeable   Consistent

♦ What magazines or periodicals do you subscribe to?

♦ What other organizations do you belong to or support?

♦ Do you hold season tickets to arts or sports events?

♦ What is your postal code?
Member Survey Worksheet

Distribution Method: Date of Distribution: __________
☐ Stand-alone mailing (10 - 20% return)
☐ Mailed with Special Appeal (5 - 15% return)
☐ Included with Renewing/New Member Welcome Packet (20 - 35% return over a year)
☐ Inside Newsletter (3 - 7% return)
☐ E-mail (5 - 40% return; limited to members you have email for)
☐ Phone Interviews (10 - 20% overall return; 50% of connections)
☐ Other: ________________________________________________________________

Reminder/Follow Up? ☐ NO ☐ YES:

Data Management & Analysis:
☐ In-House staff:
☐ Temporary hourly staff:
☐ Intern or volunteer(s):
☐ Other: ________________________________________________________________

Survey Segments:
☐ Geographic: ____________________________________________________________
☐ Length of Membership: ________________________________________________
☐ Giving Level or History: ________________________________________________
☐ Activism/Involvement: _________________________________________________
☐ Other: ________________________________________________________________

Non-member Segments?

Survey Production Team:
  Project Manager: _________________________________________________________
  Copywriter: _____________________________________________________________
  Editor: _________________________________________________________________
  Reviewer(s): ____________________________________________________________
  Designer: ______________________________________________________________
  Other: _________________________________________________________________
Databases

Think about what your organization does (or would like to do).
What information does your organization need from its contacts to do that?

Basic Database Needs (a short list):

- Contact information of donors, prospects, contacts, vendors, government, media, etc. (And how they prefer to be contacted or not)
- Date of donor gift(s)
- Membership lapse date
- Whether or not Thank You letters & Membership Kits have been fulfilled (mailed)
- Renewal ask dates
- Dates and types of asks your org made of contact
- Communications your org sent to that contact
- Interests of contact for volunteering & campaigns
- Employer and field information
- Participation in events, volunteering, attending meetings
- Interests of your contact
Do you send receipts and a personalized thank-you immediately upon receiving a donation?

Do you make it extremely clear to donors what you’re doing with their investments?

Do you thank donors again later in the year, reporting on the impact of their donation?

In your thank-yous, do you tell one specific story of how your donor’s gift is making a difference?

Do you thank three times for every one time you ask for more money? Do you give the donors the credit for the impact? (Remember, it’s about what the donor achieved, not just how great you are!)

Do you let your volunteers, service recipients, other donors speak for you? Don’t be the only one thanking your donors!

Do you send receipts and a personalized thank-you immediately upon receiving a donation?

Do you send receipts and a personalized thank-you immediately upon receiving a donation?

Do you personalize your thank-yous with at least the donor name and a signature of someone at your organization?

When thanking donors, do you tie the gift back to the appeal – thanking the donor for the specific reason you asked for money?

Additional Resources

- Thanks a Million: How to Thank Your Donors So They’ll Come Back and Give More
- The Number One Reason Donors Stop Giving
MAKING THE MOST OF SPECIAL EVENTS

BUILDING RECRUITMENT INTO AN EXISTING SPECIAL EVENT

- Include “buy a membership” as an item in your live auction. Add the opportunity to support your advocacy program by buying a week, day, or hour of your lobbyist’s time.
- Offer a member discount on registration to conferences or after school programs.
- Make sure your outing leaders have remit envelopes and are comfortable asking for membership. Collect prospecting names from waiver agreements.
- Is one of your board members or key volunteers opening a new business? Offer to “staff” the open house in return for visibility about your organization – and follow up on the attendance list, perhaps with a letter on the company’s letterhead.

CELEBRATE ANNIVERSARIES

- Anniversary of your founding
- Anniversary of a special law your group got passed
- 500th participant in one of your programs
- Incorporate membership and fundraising goals into the celebration.
  - Set up a special commemorative fund named for the anniversary.
  - Recruit contributions for down payment on an office, or an endowment.
  - Hold an awards dinner and invite non-members to join at founding day prices.
- Use the anniversary as the deadline for your board-staff-get-a-member campaign.

SPECIAL EVENT TIPS:

- Approach events on an annual basis. Few events make money their first year.
- Build a succession system into the event committee.
- Use table captains.
- Decide in advance what makes success. Include your leadership in the process.

SET GOALS:

- Participation: ________________________________
- Fundraising: ________________________________
- Audience: ________________________________
- Visibility: ________________________________
- Advocacy: ________________________________
- Outreach: ________________________________
- Recruitment: ________________________________
- Fun: ________________________________
- Other: ________________________________
### Relative Effectiveness of New Member Recruitment Techniques

<table>
<thead>
<tr>
<th>Technique</th>
<th>Effectiveness</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-Person, One-to-One Contact with Leadership or Known Contact</td>
<td>40-50%</td>
</tr>
<tr>
<td>Attending Event with Leadership or Known Contact</td>
<td>15-30%</td>
</tr>
<tr>
<td>Telephone Contact with Leadership or Known Contact</td>
<td>15-25%</td>
</tr>
<tr>
<td>Personalized Letter or Email from Someone Known</td>
<td>10-15%</td>
</tr>
<tr>
<td>Field Canvass (&quot;doorbelling&quot;)</td>
<td>10-15%</td>
</tr>
<tr>
<td>Telephone Canvass</td>
<td>4-7%</td>
</tr>
<tr>
<td>Personalized Mail</td>
<td>2-6%</td>
</tr>
<tr>
<td>Bulk Direct Mail</td>
<td>0.5-1.5%</td>
</tr>
<tr>
<td>Lead Generation &amp; Social Media</td>
<td>0.1%</td>
</tr>
<tr>
<td>Poster, Display Ad, or Website</td>
<td>0.01=0.001%</td>
</tr>
</tbody>
</table>
Capturing In-House Prospects: A Checklist

Use this checklist to make sure you are maximizing your opportunities to collect contact information from everyone who shows interest in your group.

☐ 1. In-House prospect processing system established: goal = 72 hour max. response
   ☐ Inquiry systems checked monthly

☐ 2. Database is functioning
   ☐ Capturing name, address, phone, email, source, and date
   ☐ "Do not mail" file

☐ 3. Standard prospect response letter prepared and packets assembled

☐ 4. Web site sign-up (e-newsletter, guest book, survey, contest, etc.)

☐ 5. Logical, comprehensive phone book listings
   ☐ All logical names
   ☐ All logical locations
   ☐ White & Yellow Pages

☐ 6. Web site found by top search engines (update monthly or quarterly)

☐ 7. After-hours answering system in place; system for collecting messages

☐ 8. Facebook page up, updated, and monitored regularly

☐ 9. Speakers collecting attendees’ names; sample sign-up sheet; membership kits

☐ 10. Remit envelopes in:
   ☐ Newsletters
   ☐ Thank-you notes
   ☐ Annual Report
   ☐ Information packets
   ☐ _______________________

☐ 11. Standard closings adopted for communications:
   ☐ News releases
   ☐ Op-eds and letters to the editor
   ☐ E-mail signatures
   ☐ Action Alerts
Membership Program Components

Engage, Retain, Recruit

Engage
● Thank you templates for donors, segmented by giving level with both email and print components
● Thank you templates for volunteers, segmented by giving level with both email and print components
● Prospect and Member data input within 24 hours of receipt
● Welcome Email for newsletter list, sent before they receive any other emails from org
● Membership kits, fulfilled 2x weekly by daytime volunteers
● Volunteer Nights at least 1x per month, provide dinner (not pizza) and meaningful tasks, even if simple
● Host quarterly, free casual mingles, send invites
● Host at least one annual high dollar event supporting mission
● Host at least one focused member-only party/event geared towards fundraising
● Host at least one focused member acquisition event geared towards fun
● Be highly visible where your audience is--your members, and future members, want to see you about. Choose wisely 2 outreach events per month; aim to create or capitalize on opportunities when you will acquire at least 5 memberships
● Email newsletter at least monthly
● Website content evergreen or kept up to date
● Social Media posts at least 3 times per week
● Blog updates at least weekly

Retain
● Membership kits, thank yous, etc mailed 2x per week minimum
● Easy-and-obvious-to-renew website
● Monthly givers/sustainers
● Renewal campaign with both email and print components, with no less than three pieces: before the lapse, when they lapse, and after they have lapsed. My preference is seven touches, starting 10 weeks prior to lapsing and ending 10 weeks after their membership has lapsed. Renewals should be run no less than twice per month
● Phone bank at least monthly
● Special renewal letter for past members (who are out of renewal cycle) as part of quarterly Direct Mail and Email campaign
● Member-only access program (could be content, documents, people, etc)
● Quarterly thank you communications, segmented by donor level, to show how their membership is making a difference, or to show their contribution at work.
● Discount membership program (to use card and know member status)

Recruit
● Membership mail-in envelope
● Membership form for all types of events and outreach (or use envelope, but more expensive)
● Membership form or link to form included on any and all communications
● Membership Brochure
● Web acquisition page on website
● Quarterly Direct Mail and Email campaign
● Prospecting at all events and outreach
- Twice monthly outreach events with a free service and an ask, always an ask...