Chapter Overview
Do modern rocket scientists start lobbing rockets into the sky after jotting some calculations on a napkin? Do brain surgeons pop open a skull and begin poking around hopefully? We all sincerely hope not! Both professions use massive amounts of data along with a lifetime of study and experience to make life and death decisions. While the work of association executives is not quite as dramatic, using data to inform our actions almost always benefits the outcomes we are trying to achieve.

This first piece of this practical guide to using research presents five case studies in various areas of association management operations to illustrate the value of collecting and using data to make decisions on such functions as membership, education, marketing strategies, and operational efficiency. The cases tell the story of how a variety of organizations and executives used data, even imperfect data, to improve operations and ultimately provide a greater contribution to their mission. The examples range from membership recruitment and retention, to increasing event participation, to assessing the core value and purpose of the organization.
The case studies are presented from three diverse associations: the Entomological Society of America, with an international scientific membership base of 6,500; the Association Executives of North Carolina, with a state membership base of 700; and the National Auctioneers Association, a national organization with a membership of 3,900.

**Learner Objectives**
By the end of this chapter, the reader should be able to identify, describe, or define:

- Ways that data can be strategically integrated into the decision-making process;
- How the results of the process using data can result in successfully meeting organizational goals;
- Formal and informal communication strategies in providing data to the final decision makers.

**Integrating Data into Decision Making**
Often association executives do not possess a statistical background, which contributes to the executive not using data in their decision-making process. As is evidenced below, two associations have found ways to make decisions using data that existed within their system—data that almost everyone collects: program participation numbers.

**Case Studies**

**CASE STUDY 1**
Creating Focus Through Data Analysis
by C. David Gammel, CAE

The Entomological Society of America (ESA) is the professional scientific society for those who study insects and related arthropods; in other words, bugs. While the initial stereotype that comes to mind is someone in a bush hat running about with a butterfly net, entomologists are engaged in critical research that helps feed the world, preserve human and animal health, and make substantial contributions to basic biological research.
Recently we turned the tables on our members and used some of their common research techniques to better understand their own behavior and how we can influence it in the future. No entomologists were harmed in the course of this study.

**Annual Meeting Attendance**

At the time of this writing, I had been with ESA for a little over two years. As I first came on board and got to know the organization, it seemed to me that a very large percentage of attendees were making presentations in some fashion. Some simple “back-of-the-napkin” math indicated that more than 80 percent of attendees at a recent meeting were either giving an oral presentation or conducting a poster presentation. As I dug further, it became apparent through anecdotal feedback (i.e., I called a bunch of people) that many scientists will only come to the ESA Annual Meeting if they are presenting. In those cases, it is almost always because they would only receive funding for registration and travel expenses if they are making a presentation that shares their research findings in a scientific meeting.

Those numbers and the informal feedback made it quite clear that the primary economic decision about the meeting was this: Would the investment generate a suitably respectable new line on the scientist’s curriculum vitae? The curriculum vitae, or CV, is often how scientists are evaluated in hiring and promotion decisions, and serves as the basis for their reputation in the field. It is a key metric for value in much of what ESA does.

We did two things based on what we appeared to see with the meeting: 1) we conducted some more rigorous statistical analysis of speaking compared to registered attendees and 2) we looked at our marketing process for the meeting.

**Marketing Process**

Our organization has two general stages leading up to the meeting: the general call for presentations and registration marketing. Both the call-for-presentations and registration are announced broadly. However, to this point, much more effort was being placed on registration marketing. We were, in essence, marketing to a much narrower population for registration since only those who had already submitted for presenting at the meeting were our best candidates for registration. Not giving a talk? Not very likely to go to the meeting.
So now we have changed our process to place many more resources behind getting the word out on the call for presentations. This change in focus contributed to the success we had in our last meeting. In 2012 in Knoxville, Tennessee, we received more than 100 submitted symposia during the call period. That was 30 more than our previous record for submitted symposia.

**Data Analysis**
I asked a staffer who had a pretty good quantitative analysis background to crunch the numbers on our meeting history, comparing registration with number of symposia and presentations. Looking at a 10-year history, he found a correlation of slightly more than 0.6 between the number of submitted symposia and the eventual number of registrants. This is not terribly strong, but the results show something is going on there.

Based on this finding, we devised a formula to predict our attendance based on submitted symposia. With 100 symposia, the formula indicated we would have over 3,900 registrants. Our actual was slightly under 3,000 for 2012, our third largest meeting in history.

**What Happened?**
That level of correlation left a very wide margin of error in our predictive formula. We found that our initial calculations did not take into account that many attendees present twice or more during the meeting. Poster presentations were also not accounted for in the calculations. Clearly, we have more work to do on that formula but it was an excellent learning experience for the staff and our volunteer leadership, helping us to better understand the real drivers behind our meeting.

With additional fine tuning, we should have a model that gives us a much more accurate prediction of attendance once the call-for-presentations period is complete.

**Geographic Analysis**
Another behavior we see in our scientists is that they will drive very long distances to attend a scientific meeting. It’s not uncommon to be at a meeting in New Mexico and find scientists who drove 12 hours straight to get there from the far side of Texas. Being able to load a van full of graduate students and drive to the event provides an
opportunity to maximize presentations by their students while saving on the travel budget.

Due to this behavior, we mapped our membership data and looked at how many members fell within a certain drive-time radius of our scheduled and potential future meeting locations. In Figure 1 you can see the map analysis we did for Knoxville. The software we used, Maptitude, would do a maximum of six-hour drive radius, which is what you see displayed here. They obviously never met an entomologist! Even with just six hours, over 1,000 members were in that max driving distance, with many more located just outside the range.

**Figure 1. Map of members within driving distance**

We have used similar maps as we evaluate future meeting locations. Not every city needs to have a large percentage in driving distance but it is a factor in the mix. These maps make it very easy to quickly understand how well a city may do on attracting “driving” members.

**The Soft Stuff**

Overall, we are working to make the meeting well respected in the scientific community. We want it to be the best place to present entomological science, and a fun experience overall. Without that
excellent brand, we will not be able to grow our submissions, which is the growth driver for our event.

CASE STUDY 2
Saving an Organization by Eliminating Programs
by Hannes Combest, CAE

In 2008 the National Auctioneers Association (NAA), an individual membership organization with more than 5,000 members, was beginning to lose a large number of their members. The association’s financial status was bleak with no operating reserves and there was a $600,000 loan on the building they owned. NAA was one step away from going bankrupt.

Today the organization has a much smaller membership base (less than 4,000) but no debt and several hundred thousand dollars in an operating reserve account. So how in less than five years did this financial turnaround happen?

There is an old adage that says that real change occurs only in times of real gain or real pain. The real pain that the NAA was facing helped the organization focus and target its membership benefits to cover its membership base, albeit with less resources.

For Most, It’s Much Easier to Expand Than to Reduce Programs

The NAA Board knew that over many years, several services and programs had been added to NAA’s membership benefits. Few, if any, had been removed and staff had been added to accomplish the work that these new benefits required. As a result, the number of staff doubled and the expenses related to staff and the new programs eliminated the financial reserves of the organization. No review had been conducted to see how many members participated in any of the programs—new or old.

In June of 2008, the Board began a several month process of conducting a SWOT (identifying the strengths, weaknesses, opportunities, and threats) analysis of every membership benefit that NAA offered. Inherent in the discussions was one major fact—how many members used this service?
Using Data We Already Had
Simple program participation information was used as a catalyst for eliminating programs. If a program had low or no participation, it was eliminated, regardless of its tradition or attempted function. If a program had low participation but filled a need within a specific segment of the membership, it was reviewed.

By eliminating programs, the Board and CEO were able to focus attention on the programs that had strong member participation and build on those. Many of the Board members initially argued that having these programs available with little or no participation “didn’t cost anything” and having them on our books looked like we had a robust offering of benefits. However, with the help of a treasurer who understood direct and indirect costs, we were able to help train the Board in a different direction, communicating the absolute cost of everything offered to the membership.

After six months, several programs had been totally eliminated, some programs reduced in focus, and others were sustained. The net result was that seven staff positions were eliminated; most of the positions were vacant and other existing staff were realigned within the organization. Only two positions required people being laid off. As a result, at the end of six months, the Board began to realize some financial stabilization and even some financial surplus.

Sustainable Practice
During the next two years, the Board continued to reduce programs based on member participation and add programs if demand required. During this time, we have developed policies and procedures that require that all programs be reviewed on a biannual basis. Program review has become part of the NAA budgeting process. In order to add a program, it must relate to the professional activity of the members and it must be of interest to our members. We track participation and use by members and provide this information to the Board annually, as well as the cost required to maintain the program. Because program evaluation is part of the budgeting process, it cements the idea that everything has a cost.

Using program participation rates depersonalizes the program and makes it easier to decide on keeping the program or eliminating it. The benefits NAA currently offers have strong participation rates, or
they are eliminated during the next budget cycle. An added benefit has been encouraging staff to be more innovative—we can try various programs, knowing that if it doesn’t work, the program will be revised or eliminated. Keeping non-functional programs is no longer an issue at NAA.

CASE STUDY 3
It’s Not Your Name That’s Killing Your Membership
by Jim Thompson, IOM, CAE

As someone who tries to play the game of golf, I welcome the sight of me hitting the same shot, over and over again, to the right. Why would you think that would sound appealing? Well, according to the data, I am making the same mistake, over and over again. The worst nightmare for a golfer is to go out on the golf course and make multiple types of mistakes. When you get to that point, you begin to consider taking up tennis.

That was, however, the exact same type of situation I came into when I became the Executive Director of the Association Executives of North Carolina.

To set the stage, AENC is an organization that represents the professional staff of associations based in North Carolina. Before I started with AENC, the organization had fewer than 500 members. The breakdown was about 220 Association Management members and about 260 Affiliate members. Membership was flat and had been for a while. It was as if the organization was at a crossroads.

When I became the Executive Director of AENC, I was the third staff executive the organization had since it went from an association management company to a captive staff. The first executive was with the organization for eight years and the one following was there for about two years.

According to some members, I was told that the executive before me had righted the ship and now it’s up to you to go get it started heading in the right direction.

The association had just completed a massive organizational survey. It was mailed to current AENC members, former AENC members, and nonmembers. The goal of the survey was to take the pulse of these audiences and find out why our membership was flat. We wanted
to determine what our strengths and weaknesses were so we could determine our next course of action.

So, what were the results? Well, they were very scary, but they were consistent. We were making the same mistake over and over again.

The problem with our organization was very simple. Part of our organization’s mission stated we are to provide professional development to our members in order to advance the association professional. However, according to the survey, one thing was very clear. The thing we say is our mission to accomplish is the one thing we do the worst. This is what I mean by being at a crossroads. According to the survey data, we either needed to get out of the education business, because we clearly weren’t doing it well, or we needed to really commit to improving our professional development.

Prior to officially coming on board with AENC, I had the chance to sit in on our Leadership Retreat. It was at this meeting they were going to take this newly discovered data and create the strategy for the 2005–2006 year.

During part of the meeting, I remember a couple of board members started harping on the fact that we need to grow the association management membership and perhaps one of the problems was that our name needed to be changed. Perhaps instead we should become the Association Professionals of North Carolina. Maybe then people would flock to our organizations because our name sounds more encompassing. Fortunately one of our board members stepped in and pointed to the data. Even if we change our name, we still have the problem that no one values our educational offering. And if we are going to be an association that offers professional development, shouldn’t we be the best available?

It was very clear that professional development wasn’t a real priority for the organization. After my first week, I had a meeting with our professional development committee. As the executive director, I was the staff liaison to the committee. On the agenda for the meeting was the October Association Forum. On the agenda there was no date, so at the meeting I assumed we would be planning for next year’s Forum and was quickly deflated when I found out that no, in fact, we were planning the event that would take place in five weeks. We had no speaker, no topic, only a location and a sponsor. We hadn’t even sent out the first registration form.
This was how low a priority our professional development was to the organization. We managed to limp through with our education till about the third quarter, and at that point the professional development committee met and created two polices moving forward. Beginning with that meeting, they would plan out the entire calendar a year in advance, so we would have something to market to current and potential members. In addition, to address the quality and topics of our programs, we created a policy that any future AENC professional development must fall within the CAE domains.

As of today, if you ask AENC members what is the one thing they value most about their membership, most will tell you it’s our professional development.

The Sacred Cow Makes the Best Hamburger
As the organization continued to focus on professional development at AENC, we were able to turn our eye toward our other issue—membership. As we looked through the ranks of the organization, it didn’t take data to tell you that the organization was beginning to turn gray. And while that isn’t currently a problem, if we don’t begin recruiting deeper within North Carolina organizations, we are going to start feeling the effects of natural attrition.

According to our recent survey results, the average staff size for an AENC association was six. AENC had a large percentage of the eligible associations in North Carolina; however, very rarely did more than one person from each organization join. How could AENC figure a way to encourage more people from our current associations to join?

Our current membership structure provided for a primary member, and any additional paid the additional member fee, which was about $50 less. This was obviously not a huge incentive to add additional staff.

I did some research and looked at what other associations were doing to grow membership within existing organizations. After much research, I found one of my counterpart organizations that had recently begun offering a group membership. After the first year of offering the group membership option, the organization grew by 100 association management members. I think we might have found a winner.
One of the key roles I see for the chief staff executive is to also serve as the chief innovation officer. So, I brought up the idea with our membership chair. The chair put the idea on the next agenda and had the membership committee discuss the idea. The committee requested staff put together a proposal for what the group membership would look like and bring it back before the committee. So, the staff sat down one afternoon and worked through all the nuances and came up with a proposal for a group membership.

The groups looked like this:

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<th>Level</th>
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<tr>
<td>Level I</td>
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<tr>
<td>Level II</td>
<td>5–6</td>
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<tr>
<td>Level V</td>
<td>15–20</td>
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<tr>
<td>Level III</td>
<td>7–10</td>
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<tr>
<td>Level VI</td>
<td>21–30</td>
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At the time, membership was about $250 for the first member and $225 for any additional member. With the group membership, we proposed lowering the cost of dues to as low as $99 per member if you did the Level VI membership.

The membership committee was very excited about the possibilities. We knew it had worked in another association like ours. We knew we had room for growth because very few groups had more than one member. And we felt like we were developing a quality product that was worth marketing again. We all knew the one thing the board was going to have a problem with was the fact that because we were discounting membership dues, we were likely to lose money the first year, and if we didn’t grow the membership as projected, not only would we not have many new members, but we would have less revenue as well. And more importantly, we would be changing the way we had handled membership for years.

We encouraged the board, however, to look at the data. If we do this group membership offering right, we will ultimately make up the initial loss of revenue because many of our associations that have only one member will see the value and add additional staff. So, the board took a leap of faith and killed its sacred membership structure in favor a new group membership.

Today AENC has over 700 members. We have about 400 association management members and represent over 320 associations. That’s a 56 percent increase in our core membership in four years and a 60 percent increase in the number of associations represented. We
have also increased our retention rate from the low 70s to over 95 percent.

A few years after our membership increase, another issue began to arise.

AENC’s professional development consisted of four quarterly membership luncheons, six association forums, our Trade Show, and our Annual Meeting. The membership luncheons each featured a keynote speaker and a morning seminar. The Trade Show consisted of exhibit time along with a morning education session, and the Annual Meeting was your typical annual meeting. Except for the Association Forums, our membership increase was having a positive effect on our attendance at the other events. So, what was going on with the Forums?

The Forums were half-day education sessions, and we had been doing some version of this type of event for years. For the Forums, we had to find a speaker, a location, and a sponsor for each event. We also had to develop promotional material, we had to register folks, and then we had to go through the motions of having the meeting. The problem was that we would work so hard, sometimes to get only eight people to show up. In some cases we were forced to cancel the event because of poor attendance. It finally got to the point we began to ask ourselves why we were putting in all this effort for such little reward. We all realized that we have been doing some version of the Forums forever, but perhaps it was finally time to kill the sacred cow.

During a strategic planning meeting, the board of directors created an objective to examine the future of AENC’s Association Forums. We sent out a survey asking the members why they weren’t attending the Association Forums. Once we collected that data, we decided to do a focus group with our chief staff executives, our director/managers, and a group of younger members. Again, we were very pleased that the members were saying the same thing: Kill the sacred Association Forum. When we don’t attend events, it’s not because we are talking with our feet, we just can’t commit a half day and $60 to attend an event taught by a speaker. The members told us that they’d rather AENC save the time and energy trying to find locations, sponsors, and speakers, and instead allow the members to get together among their peers and learn from one another. As most folks know, usually the smartest person in a room of professionals is the room itself.
The board got back together and with the data from the surveys and the comments from the focus groups AENC created two peer-to-peer Roundtable groups. One would be for chief staff executives and the other would be for meeting planners. The AENC Roundtables have been going strong now for about four years. We now have Roundtables for our affiliate members, our members in Charlotte and the Triad, and have just agreed to add an additional Roundtable that will rotate monthly between four topics that were identified in a recent professional development needs assessment—membership, marketing/communications, technology, and government relations. Killing that sacred cow made some incredible hamburger. In a typical year, AENC would have about 80 people attending the Forums. Today, AENC averages about 450−500 people a year interacting through the Roundtables. It’s a lot less work for staff and the members are really enjoying engaging with their peers.

**Where to Go When You Need to Know**

Now that professional development is considered one of the best things we do and membership is at an all-time high, the board of directors had the luxury of tackling another issue that has plagued the association for years: How do we increase the recognition of the association profession?

During the summer of 2011 at our annual leadership retreat, the board discussed that issue. As a matter of fact, as an organization we did something very exciting. We proclaimed that our current vision of becoming the premier resource for the association professional in North Carolina had been achieved and it was time for a new vision. After much dialogue, we adopted a new vision—*Association Management will be widely recognized as an esteemed profession that improves the lives of North Carolina citizens.*

Following the retreat, our president created a task force to look into how we might work to increase the recognition of the profession. To increase one’s brand awareness is quite a task, and when the task force met, we realized quickly we needed to consult with a brand expert. Fortunately, because our planning is done before the budget, we were able to include some funds for our recognition effort and we hired a brand consultant to help us work to increase our recognition.
The first meeting with our brand expert led us to develop a survey that we would email to our association management members. Our main objective was to fine-tune the recognition. Because brand awareness is such a large task, we tried to identify if there were key audiences we could start with to begin to move the needle. As you can imagine, the survey results showed that members wanted first to increase their recognition with the general public, next was the legislature, and next the media. We also asked members to tell us where they thought those audiences got their information. For the legislature and the general public, it was the media. So, the task force decided to try to focus on increasing our recognition with those two audiences—the media and the legislature.

Once we had that data, the task force, along with a few members who had great knowledge of the legislature and the media, met for two day-long workshops. Over those two days we completed a brand awareness exercise that helped us develop messaging to the media. We determined what they needed to do their jobs better and how AENC could help. In addition, we also reviewed every product/service that AENC offered and looked at ways we could incorporate our brand recognition efforts. We also created recommendations for a few new things we could do that we were not already doing. The task force met again later and developed a list of about five new items to recommend adding, in addition to the tweaks we would make to existing products/services.

Today we have developed a branded logo and a tagline—AENC Is Where to Go When You Need to Know—and we are in the process of promoting that to those audiences.

Although it is too early to tell if we have moved the needle on our recognition, this is a great example of how an association has to be constantly examining where it is in its life cycle. As it cruises along, you are constantly tweaking things to make them better and using data to drive the direction of where the ship goes.

**KEY LESSONS FROM CASE STUDIES:**

1. Validate your assumptions.
2. Gain insight into behavior.
3. Create a productive framework for decision making.
Chapter Summary

These three case studies illustrate ways that professional associations can use existing data or data that are relatively easily obtained to direct or market program offerings. The data-collection methods ranged from anecdotes to database activity records to opinion surveys. Some of the key lessons we hope you take away from these cases include:

- **Validate your assumptions.** Most executives have years or decades of experience to rely on. However, it is critical to test our assumptions with data and see if they hold up. The world is always changing around us and what worked yesterday may not still work today.

- **Gain insight into behavior.** Our membership databases are goldmines for behavioral data. Every transaction with the association provides potential insight. Yet, this data is often just used for accounting. Dig in, dump it into Excel, and see what you can learn.

- **Create a productive framework for decision making.** As several of our cases showed, using data helped to temper emotion-laden decisions, enabling change to happen that would have been impossible without incontrovertible statistical evidence.

In the next chapter, you will learn about some of the standard research projects associations should conduct on a regular basis. Specialized research techniques as well as sources of internal and external information are introduced.

**Five Questions to Ask Yourself**

The following self-assessment questions can help you develop thoughts for your own organization as you move forward:

1. **Review a current challenge or opportunity.** What is the minimum information you need to make a decision, rather than the maximum available information?

2. **What geographic data do you have available that is relevant to your most important objectives and goals?** Apply it.

3. **What is your best guess for a solution or change and how can you validate the decision with data?**
4. Data is doubly valuable when applied to emotionally charged decisions. What data is available for the emotionally charged issues in your organization?

5. Killing a sacred cow in an organization requires data. What types of sacred cows exist in your organization and what sorts of data can you use to end that product/service?

A B O U T T H E A U T H O R S

Hannes Combest, CAE, Chief Executive Officer of the National Auctioneers Association (NAA), entered the association management profession in 1996. Prior to being announced as CEO of the NAA, located in Overland Park, KS, she served in several positions for the Golf Course Superintendents Association of America in Lawrence, KS.

C. David Gammel, CAE, is Executive Director of the Entomological Society of America (ESA), in Annapolis, MD. Gammel has worked with associations since 1993 and is the author of two other books published by ASAE: Online and On Mission: Practical Web Strategy for Breakthrough Results (2009) and Maximum Engagement: Moving Members, Donors, and Customers to Ever-increasing Levels of Participation (2011).

Jim Thompson, IOM, CAE, is the Executive Director of the Association Executives of North Carolina (AENC), where he has been since September 2005. Before working at AENC, Thompson was the Director of Business Development for the NC Association of REALTORS® (NCAR), a position Thompson helped establish after his first year of employment with NCAR. He worked at NCAR for over five years and helped to substantially increase revenue for the association and streamline the sponsor development program. In 2006, Thompson was named one of the Outstanding Young Executives by Association Trends magazine. Since joining AENC, Thompson has taught several programs on the board and volunteer relationships, developing nondues revenue, increasing membership growth, and developing association staff and leaders.