

Item 9.1.1 Attachment

NSPE Membership Retention Task Force Report

For NSPE Board of Directors January 2013 Meeting

The Retention Task Force (RTF) under the Membership Committee was charged to:

Investigate the underlying reasons for drops and develop recommendations to address the most common reasons. Determine member expectations and how NSPE is and is not fulfilling those expectations. Investigate and develop recommendations for intervention.

The RTF has held 5 full task force conference calls and 5 subgroup calls where issues have been discussed. In addition, we utilized data from NSPE staff, other States, and direct calls to dropped members during our vetting of board recommendations.

Recommendations:

The Retention Task Force submitted four (4) recommendations to the Board for consideration at the January 19, 2013 meeting. (Refer to recommendation documents for background and further detail).

- #1: Develop and track retention rate goals
- #2: Modify NSPE Retention Process to include phone calls to members prior to drop.
- #3: Modify NSPE Retention Process to include sending "Thank You" email upon renewal

Potential Recommendations Requiring Further Study:

The Retention Task Force touched on a number of potential ideas and process improvements that required more time and staff input to fully vet prior to making a recommendation to the Board. We believe that small, targeted taskforce groups under the umbrella of the Retention Task Force and/or Membership Committee could vet these potential recommendations within a six month time frame in order to present no later than the Summer NSPE Board meeting. The task force subgroups would require staff support and participation in order to ensure that the recommendations took into account Association best practices, accurately estimated ongoing NSPE staff resource needs, and took advantage of knowledge of current processes and resources.

The Retention Task Force is requesting direction from the NSPE President to assign task force subgroups with NSPE staff input/participation to continue study of specific items in effort to further increase retention rates. Namely, to:

1. Determine viability of program that would allow members to sign up for auto renewal (consider this through PayPal).
2. Evaluate renewal process for effectiveness and develop recommendations in line with Association Best Management Practices. [Also review when to use secondary contact information to supplement primary].
3. Develop (or document) and communicate a clear system of communication between chapters, states and national regarding membership data and reports.
4. Update member account screen so that all data is available, clicks to update are clear, and all fields are editable by the member.
5. Develop program with states/chapters to verify member data (specifically to obtain email addresses and research "bounce back" items).
6. Streamline membership database manipulation and report processing.
7. Consider recommendation to encourage States to set up a Student Professional Development committee modeled after Florida to focus on (1) interaction between professional and student chapters, (2) retaining/converting student chapter members to professional members after

graduation, and (3) engaging faculty. We will be coordinating with the Young Engineers Advisory Council on this item to see if they already have something along these lines or have ideas to supplement.

8. Look into the current NSPE Mentoring Program to see if there is a way to capitalize on this or strengthen it to attract and retain young members. Consider developing guidelines for programs at state or chapter level to implement at their discretion.
9. Review data from August 2011 Exit Survey to determine if there is enough consistency in answers to tease out potential recommendations regarding NSPE programs, perceived value, and/or member communication. Make recommendations for modifications to Exit Survey questions, if any, and develop plan for NSPE to conduct exit surveys on regular basis.
10. Review NSPE membership terminology to remove negative or inaccurate connotations, specifically "Expired Members" and "Delinquent Members."

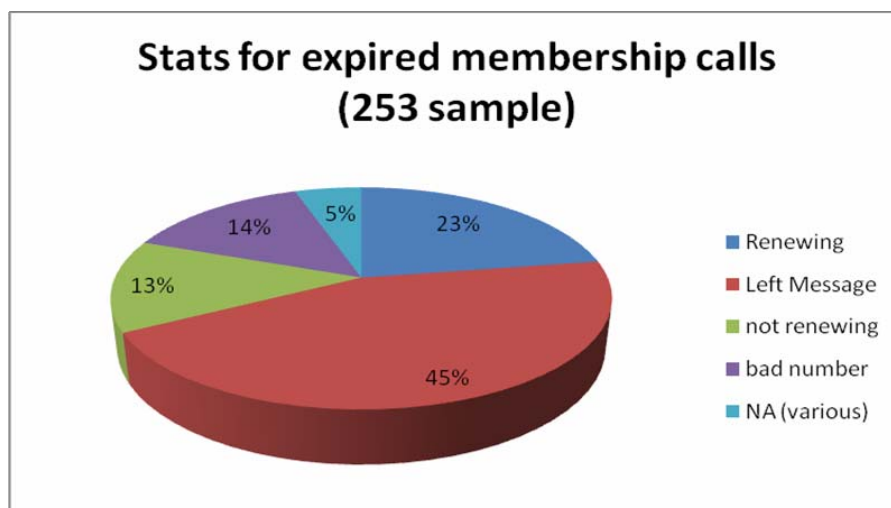
Background Material

The Retention Task Force created four subgroups to work on different aspects of retention. We then brought that information back to the entire group to vet for final recommendation to the board, transfer to a different committee/ task force, or add to list of items needing further study. Data gathered and actions taken by the subgroups are listed below.

Determine Member Expectations and NSPE Delivery on Expectations:

This subgroup developed a methodology and script for telephone surveys of dropped members in order to attempt to determine reasons members do not renew. The Retention Task Force group conducted a telephone survey of dropped members (264 attempted between task force members and NSPE staff). Below is a summary of the results of the calls.

	<i>Task Force Calls</i>		<i>NSPE Calls</i>		<i>Totals</i>	
Renewing	15	20.5%	42	23.3%	57	22.5%
Left Message	19	26.0%	94	52.2%	113	44.7%
not renewing	15	20.5%	19	10.6%	34	13.4%
bad number	14	19.2%	22	12.2%	36	14.2%
NA (various)	10	13.7%	3	1.7%	13	5.1%
Subtotal	73		180		253	



Of the 15 members surveyed regarding their reasons for not renewing, the categories of responses are listed below. Those stating that they did not perceive enough value did not give specific enough information to determine what value changes might be made or communication of value could be improved to have changed their mind.

Reasons for not renewing	Number	% of Total
value	6	40%
cost	3	20%
retiring	3	20%
career change	1	7%
time	1	7%
illness	1	7%

In addition to the data collected above, NSPE conducted an exit survey in August 2011. Full report of the survey data is included as Appendix A.

Retention of Younger Members (including getting more students engaged and converting more student members to full member status)

Accomplishments:

1. Referred ideas on specific messaging for younger member recruitment and retention to the Marketing, Membership Segmentation Task Force
2. Referred Deans Road Map previously presented by LQPC to current LQPC chair for re-consideration as item to possible present to board.
3. Developed two of the items for further study (items #7 & #8)

Membership data integrity (i.e. how to better maintain correct member contract info & feasibility of tracking members down at renewal)

Accomplishments:

1. Referred recommendation to start linking back to NSPE website in email correspondence (articles – for more info click here...) to the *Technology* and Communications Task Force.
2. Developed three of the items for further study (items #3, #4, & #5)

Renewal and drop process effectiveness – review current process, cost (time and money), ROI, etc and determine if there are areas of improvement

Accomplishments:

1. Developed recommendation #3.
2. Developed three of the items for further study (items #1 & #2)

Retention Task Force Members:

Julia Harrod, PE (TX) *Task Force Chair*
 Kodi Church, PE, Esq., F.NSPE (MN) *Task Force Vice Chair*
 Nancy Blackwell, PE (TX)
 Gail Boddicker (Executive Director, South Dakota Engineering Society)
 Tracy Eslinger, PE (ND)
 Kenneth McGowan, PE, F.NSPE (WA)
 Randal Riebel, PE (GA)
 Charlie Rossman, PE (CO)
 Ed Segner, Jr., PE, PhD (AL)
 Amanda Smith, EI (FL)
 Majella Stevenson, PE, F.NSPE (HI)

Appendix A – August 2011 NSPE Exit Survey

1. For what reason(s) did you initially join NSPE? (If more than one reason applies to you, please rank your choices in order of importance with 1 being most important, 2 important, etc.)						
Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.						
	1	2	3	4	5	6
Continuing Education (CEUs, PDHs)	23 18%	35 27%	28 22%	16 12%	14 11%	13 10%
Networking	54 38%	31 22%	23 16%	16 11%	14 10%	5 3%
Resources (job board, PE Magazine, salary survey)	30 22%	28 21%	33 24%	30 22%	8 6%	7 5%
Legislative and Government affairs	10 8%	28 23%	28 23%	19 15%	25 20%	14 11%
Member referral	23 19%	15 13%	15 13%	16 14%	23 19%	26 22%
Other	38 40%	9 10%	9 10%	3 3%	9 10%	26 28%

2. What are ALL THE FACTORS that influenced your decision not to renew your membership at this time?		
Retired	55	24%
License has expired	8	4%
My employer no longer pays for membership	62	27%
Others in my firm/organization are members and I receive NSPE information/benefits through them	4	2%
Membership dues are too high	91	40%
I did not find the membership too be valuable	81	36%
Other, please specify *	72	32%

3. If you chose "other" as a reason in question 1, please specify here.		
66 Responses *		

4. Did you receive your renewal notice/invoice from NSPE?		
Yes	206	93%
No	16	7%
Total	222	100%

5. If you did receive your renewal notice/invoice(s), was it through:		
Mail	85	43%
Email	20	10%
Both	94	47%
Total	199	100%

6. Have you ever attended NSPE's Annual Conference? If yes, please provide feedback. If no, please tell us why. *		
Yes	19	9%
No	202	91%
Total	221	100%

7. Have you ever attended a State Society conference, meeting, or event? If yes, please provide feedback. If no, please tell us why. *		
Yes	79	35%
No	145	65%
Total	224	100%

8. Have you ever attended a local chapter conference, meeting, or event? If yes, please provide feedback. If no, please tell us why. *		
Yes	130	59%
No	92	41%
Total	222	100%

9. Please list other organizations that you are currently a member of:		
164 Responses *		

10. In what way could we improve the value of your membership, in order for you to retain it?		
155 Responses *		

* Written responses are over 25 pages in length and not provided with this document.

NSPE Retention Task Force
Recommendation for NSPE Board of Directors Action
Winter Meeting – Newport Beach, CA
January 19, 2013

NSPE Action Plan Goal #3: Membership Growth

Recommendation #1: Develop and track retention rate goals

Background of Recommendation: The Retention Task Force recommends setting retention rate goals and tracking this metric in order to support a lasting focus on membership retention rate, facilitate evaluation of retention programs, and track NSPE's progress. Realizing that State awareness and participation in retention programs is critical to improving NSPE's overall retention rate, the task force further recommends working with the States to develop State goals, communicate National retention program efforts, and provide metrics by State (along with compiled National metrics).

Actual Recommendation for Board Action:

Develop and track retention rate goals, starting with 5 year projection to match current membership goal challenge. Update each year as part of budgeting/ projection process.

- a) Communicate NSPE retention rate goals with the States and work with States to develop individual state goals to ensure that overall national goal is met.
- b) Communicate all national retention activities with the States and coordinate as necessary.
- c) NSPE to revise membership reports to include the number and percentage of dropped members, new members, and totals. This information will be broken down by state for all three tiered members, national only data, and compilation of all national members (national only and three tiered). State only members will not be listed in this report since that data is not currently available within the NSPE membership database.

Estimated Impact on Budget for 2012-2013 Year. None

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NSPE Retention Task Force
Recommendation for NSPE Board of Directors Action
Winter Meeting – Newport Beach, CA
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NSPE Action Plan Goal #3: Membership Growth

Recommendation #2: Modify NSPE Retention Process to include phone calls to members prior to drop.

Background of Recommendation: The Retention Task Force made calls to dropped members in order to obtain data on why members were not renewing their membership. What we found was that over 20% of our calls resulted in the member wanting to renew even though we were specifically not promoting renewal or even asking about renewal, but simply asking why the member was dropping their membership. NSPE staff subsequently made calls to members that were just about to be dropped and got similar results (23% of calls stating they wanted to renew). Based on these results, it appears that both staff and member calls got similar results. Since scheduled staff calls would be more consistent and sustainable than volunteer member calls, we are recommending that this practice be incorporated into the retention process.

Actual Recommendation for Board Action:

NSPE staff to make calls to all members prior to drop. As part of the program, NSPE shall:

- a) Coordinate with States in order to avoid duplicate calls.
- b) Renew members over the phone by walking them through online renewal process or emailing renewal application when member indicated they want to renew. If not renewed while on phone, track for follow-up to ensure renewal. Have NSPE member volunteer follow up with phone call if not renewed within two weeks.
- c) Obtain data on why the member is choosing not to renew if member indicates they do not wish to renew.
- d) Track all data from the calls (1) in manner that can be shared with States and Chapters, (2) can track rate of return on phone calls, (3) captures data on why members resign from the organization, (4) notes when member cannot be contacted due to bad contact information for potential follow up with state/chapter to try and retrieve that information.

Estimated Impact on Budget for 2012-2013 Year. None.

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NSPE Retention Task Force
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NSPE Action Plan Goal #3: Membership Growth

Recommendation #3: Modify NSPE Retention Process to include sending “Thank You” email upon renewal

Background of Recommendation: The Retention Task Force saw an opportunity to reach out to members in a positive manner by saying “thank you” upon renewal. This simple process will potentially allow for three outcomes: (1) show our appreciation to members for being members, (2) allow members to know that their renewal has been processed (this is especially important for those on enterprise membership or other company-paid memberships), (3) give NSPE the opportunity to promote NSPE value with succinct ‘value message’ within the email.

Actual Recommendation for Board Action:

Add step to renewal protocol to send a “thanks for renewing” email. Communicate recommendation to Marketing Task Force to look at this as an opportunity to succinctly promote NSPE value and activities as well.

Estimated Impact on Budget for 2012-2013 Year. None

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