Association Laboratory Inc.

An Overview of Membership Research

Abstract

This article is designed to provide an overview of key aspects of a successful membership research strategy. Key concepts include the following:

- Establishing a Research Management Strategy
- Areas of Inquiry for Membership Research
- Research Methodologies for Associations
- Survey Deployment and Analysis
- Engaging a Research Consultant

The development of a successful research strategy is fundamental to providing the information and insight necessary to act as a catalyst for successful decision-making. Modern associations will incorporate a research strategy into the operational investment of the association to improve decision outcomes.

Introduction

In 2004, Ed Salek, executive director of the Society for Tribologists and Lubrication Engineers (STLE) faced a difficult situation. The association was struggling because of industry changes and external factors beyond the association's control. Decisions at the association were based on home grown research and it was difficult for staff and volunteers to come together on what strategies were necessary for success.

In 2005, STLE conducted its first membership needs assessment in more than 10 years. This online survey provided information about its membership audience, members' participation with the association, environmental forces affecting member companies, and the relationship of other organizations that directly and indirectly competed with STLE.

The Board and staff reviewed the analysis of this information, internalized it, and used it to guide decisions.

To internalize this information, several tactics were implemented. The information was presented to their Board by an external research consultant who also met with their executive committee to discuss the findings. These initial discussions created a common understanding of the information and agreement on its meaning. During the succeeding months, staff met to discuss how the information applied to each department and program within the association. In addition, the information was presented to various membership groups and committees.

This communication ensured that decision-makers were aware of how best to use the information and members understood that their input was being used to improve membership value.

By 2007, the STLE had achieved the following outcomes:

- Increased the association's net worth by over 20 percent
- Increased the association's revenue by approximately 30 percent

"The research made us more confident in our decision making, less risk averse. Our staff and volunteers had a feeling that we understood the market and were not being pushed and pulled by forces we did not understand." Ed Salek, CAE – Executive Director, STLE

While the research was not the only factor contributing to this success, Salek believes the research was a "catalyst" that provided the first key to the decisions necessary for this growth. He is "certain that the research gave us a foundation for success."

The STLE experience is a good example of how an association can use membership research to effectively guide decision making and how better decisions lead to improved performance. Unfortunately, STLE's success is too often the exception, not the rule. Many associations continue to struggle with the decision to use research, the effective implementation of research, or the use of research information in decision making.

This chapter provides an overview of the membership research process, guidance on the use of membership research, and examples of how associations use membership research to improve decision making. While by no means a comprehensive treatise on research, it provides association executives with the basic insights necessary to establish a methodical and effective membership research process for their associations.

Establishing a Research Management Strategy

Membership research is defined in this chapter as the planning, collection, and analysis of data relevant to membership decision making and the communication of the results of this analysis to staff and volunteer leaders. The association can study many different constituencies to address a wide range of potential issues. Membership research often takes priority for the following reasons:

- Members represent the primary market of the association.
- Members represent a sample of the potential market of the association.
- Members represent an accessible, definable audience for research activities.
- Decisions affecting members have the greatest potential return on investment for the association.

The ongoing collection, analysis, and use of membership information are critical for sustainable association growth and success, and the ability to manage this process is a fundamental competency of the membership executive.

What Decisions do You Want to Make? When determining which decisions you want to make, it is helpful to identify what outcomes you hope to achieve by making better decisions. For example, the following are common membership outcomes:

- We want to increase the number of members.
- We want to increase the number of attendees at our annual meeting.
- We want to improve our retention rate of members.
- We want to improve the satisfaction of our members.

If you have a clear understanding of the outcomes you hope to achieve, you can identify the areas of inquiry important for a research process to address. You can also evaluate the return on investment of your research activities.

Key Questions Membership Research Can Address. Common membership outcomes generate a series of key questions that are often answered through membership research.

- Whom do we represent and how is the membership divided into different markets and constituencies?
- What are the programs and services that provide the most value to our members?
- What are the issues and problems with the greatest impact on our members?
- How can we improve the marketing and implementation of our programs and services?
- What competitive influences have the most impact on our members?
- What opportunities exist for our association and how do we take advantage of these opportunities?

By developing an ongoing process to answer these questions, the association creates a research management strategy providing decision makers with the information and insight necessary for the association to create long-term, sustainable growth. When establishing the association's ongoing research process, consider the following questions:

Who is going to use the research results? Associations often serve many different audiences. As a result, research activities are often designed to serve a wide variety of decision makers.

> ***In 2007, the Association Forum of Chicagoland conducted a comprehensive membership needs assessment and used the information collected through it to provide:***
>
> ***Guidance to the board for strategic planning. Guidance to individual staff department heads on program improvement. Guidance to volunteer leaders of special interest groups to improve programming and members' access to function-specific special interest group meetings. Guidance to the association's Content Committee on the identification and prioritization of educational topics***
>
> ***This example represents only a portion of the decisions that were supported by this membership research project.***
>
> ***The Association Forum has established an annual process for collecting membership information and both staff and volunteer leaders habitually use this information to guide decisions ranging from the tactical to the strategic.***

Different groups within the association have different roles and responsibilities. Each group needs information for different types of decisions. By understanding who will be using your information, you can make sure that the information collected addresses their needs.

What is the venue(s) for decision making? There are three main venues for decision making within the association. The needs of decision makers within each venue should guide research efforts of:

- Volunteer leadership groups (e.g., board of directors)
- Staff/volunteer leader combinations (e.g., membership committee)
- Staff groups (e.g., staff meeting or budget committee meeting)

Information at its most strategic level regarding the association's membership and the member environment is necessary to support board-level decisions about organizational strategy. For staff/volunteer groups, information must help these groups make decisions within their areas of influence, such as chapter development, conference education, or member marketing activities. Staff-directed groups need tactical information to guide execution of programs and services by improving the configuration and marketing of these efforts.

Although information collected through the research process should be reconfigured to meet the needs of decision makers within each venue, information used in each venue is not mutually exclusive. Volunteer groups may also need tactical information and staff groups will also need strategic information.

What is the time frame of the decision? Some decisions are made on an immediate basis, while others are considered over a long time frame. For planning purposes, three general timeframes may be used.

- Long term—greater than 1 year. Long-term decisions relate to the ongoing assessment of the member market and the evolution of the association over time to serve members within this market. Decision makers must anticipate how factors will affect members three to five years in the future and prepare accordingly. Environmental scanning information to guide strategic planning is an example of information supporting long-term decisions.
- Annual. Annual decisions relate to the annual planning and implementation of the association's programs and services, for example budget development and approval. These decisions are predictable and important to effective allocation of resources. For example, an annual satisfaction study could provide insight into which programs or services are expanded, reduced, or modified.
- Short term—less than 1 year. Short-term decisions may take place at a committee or staff meeting and guide the direct implementation of association programs and services. Staff needs specific information relevant to these decisions. An example might be insight into how to improve the rate of renewals during the membership renewal process.

By understanding the time frame of decisions, you can establish specific tactics for data collection and analysis to ensure that information is available when the decisions are being made.

What is the impact of the decisions being researched? The value of research is in the application of data, not the collection of data. If the association is not going to use research, then conducting research is a waste of time and resources. Depending on the impact of a decision, the association executive can determine the relative worth of a research process supporting a decision.

STLE, cited earlier, had a budget of approximately $2.3 million in 2005. Their investment in a unique research study was approximately $15,000. Decisions based on the research and the improved decision-making environment initiated by the use of research eventually helped produce an increase in net revenue of approximately 30 percent.

In this instance, the staff's use of the information justified the investment because they made decisions that had a direct impact on the business results, and these results greatly exceeded the direct costs of the research.

The association executive should consider not only the beneficial outcomes of better decision making but also the opportunity costs of continuing activities based on incorrect assumptions or knowledge. Consider the following simple analysis for a sample association.

The association has a budget of $1.5 million and represents 3,000 members with a dues amount of $200 per person. The association's retention rate has been a steady 80 percent for many years.

Each year the association conducts a fall and spring new member campaign, mailing 1,000 membership brochures to prospective members. The brochure outlines the key membership value proposition and member benefits and the two mailings cost a total of $6,000 (excluding staff time).

Unfortunately, since the brochure is based on the wrong member value proposition, the performance of the promotion is not as effective as it could be. Instead of getting 100 new members each year from this campaign, the association acquires only 50. Table 1 highlights the costs of this reduced performance.

Table 1 Performance, Expenses, and Lost Revenue

Year 1 Lost Revenue	Year 2 Lost Revenue	Year 3 Lost Revenue
50 new members @ $200 = $10,000	40 retained members @ $200 = $8,000	40 retained members @ $200 = $8,000
	50 new members @ $200 = $10,000	40 retained members @ $200 = $8,000
		50 new members @ $200 = $10,000
Lost revenue = $10,000	Lost revenue = $18,000	Lost revenue = $26,000

Year 1 Direct Expense	Year 2 Direct Expense	Year 3 Direct Expense
Campaign Costs = $3,000 (1/2 are wasted)	Campaign Costs = $3,000	Campaign Costs = $3,000
Total Cost **$13,000**	**Total Cost** **$21,000**	**Total Cost** **$29,000**

The total costs for this decision error are $63,000 over three years. In addition, this example demonstrates that the costs increase for each year the association fails to correct its mistake. Finally, in this example, we've only considered a single promotion. Since the fundamental understanding of the member value proposition is incorrect, every new member promotion is flawed, so the total cost of this mistake is amplified.

This is a simple example but it illustrates how using membership research effectively can have substantial short- and long-term benefits that must be considered when making decisions about the annual research investment of the association.

Saving $15,000 in the direct costs of a quality research study fails to take into account the opportunity costs and direct impact of decisions based on a flawed understanding of the market. As the potential opportunity costs of making the wrong decision increase, the justified investment in research also increases. If in doubt about the decision to conduct research, simply ask yourself if you can afford to be wrong. The more strongly you answer no, the more important research to support your decision becomes.

Areas of Inquiry for Membership Research

Research can be as simple or as complex as your budget and time frame allow. Based on the assumption that the association does not currently have a robust research program, there are four key areas of inquiry that represent common areas of inquiry for membership research. The following diagram identifies these four areas of inquiry and their relationship to membership marketing strategy.

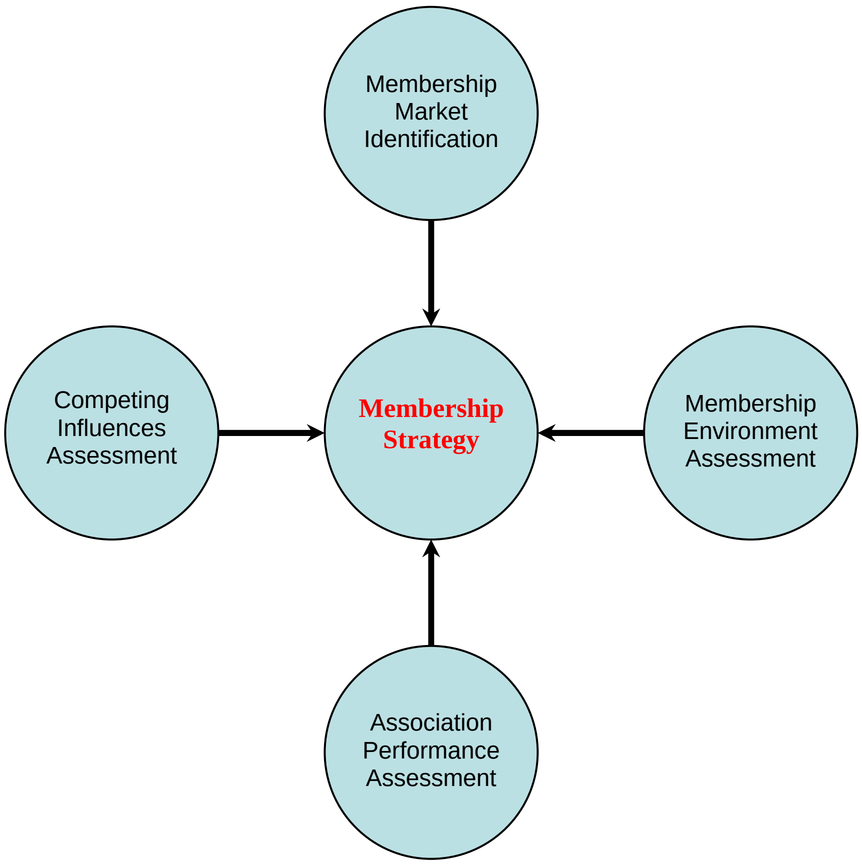


Figure: 1Essential Areas of Inquiry for Membership Strategy

By collecting information in each of these areas, the association creates a comprehensive picture of the membership and the factors with the greatest impact on membership strategy. The identified four areas of inquiry should not limit the association's exploration of potential research topics but should begin providing the necessary context about which areas might be most useful to study, given limited resources and the association's distinct research goals.

<u>Market Identification</u> *Who do we represent?* A key step in membership analysis is to create a membership profile identifying the individual and organizational characteristics of your membership that are important to decision making. Individual characteristics are demographics related to the person, for example age or gender. Organizational characteristics are demographics related to the employing organization within which the person may operate, such as the number of employees or gross revenue.

The purpose for creating an audience profile is to clearly identify primary audiences for service, their unique characteristics, and similarities and differences between audiences.
Understanding the characteristics of an audience is essential to customizing the association's service to these audiences. In addition, this audience definition helps leadership prioritize between audiences so that resource allocation decisions can be made openly and objectively given the strategic priorities of the association.

Example: Association Forum of Chicagoland

<u>Market Identification</u>

Beginning in 2005, the Association Forum of Chicagoland (Forum) implemented a wide variety of changes in programming and instituted several new membership initiatives. Because of these changes, a goal of the 2007 membership study was to profile the audience of the association to provide more detailed information about the constituencies of the association and how these constituencies were related. The Forum identified a link between age, title, and work responsibilities.

By understanding this link, the Forum was able to identify how the career progression of a young professional – from a young executive through chief staff officer – affected their participation with the association.

<u>Membership Environment Assessment</u> *What is the environment in which members operate*? The impact of the environment on your members will shape their relationship to the association. The purpose for researching this area is to collect the evidence necessary to identify the concerns and challenges facing or anticipated by the association's members. By understanding the problems of the target audience; your association can produce, modify, or expand programs that address these problems.

Example: Professional Convention Management Association

<u>Environment Assessment</u>

In 2007, the Professional Convention Management Association (PCMA) conducted a study that identified 32 factors within the conventions environment considered critical over the next three years by convention industry executives.

This information was used to guide the development of specific programming to educate members about how to address these areas. One theme identified was members' desire to improve convention and meeting business outcomes through revenue growth or expense reduction. This desire for improved outcomes was evidenced by an interest in negotiation skills.

PCMA used this information to develop a senior-level program about negotiation in less than three months to provide education to members about strategies designed to help them create more favorable agreements with key suppliers.

Environmental analysis can range from macro-factors, such as immigration or changes in technology, to micro-factors specific to the individual, such as a personal desire to limit business travel. Five distinct areas should be considered for analysis:

1. <u>External environmental factors</u>. External factors are defined as issues completely outside the member's industry but with an impact on their company or profession. An example of these factors from the PCMA study was dealing with new competition to meetings, conventions or exhibitions enabled by new technology.
2. <u>Industry factors</u>. Industry factors are defined as issues within the industry in which your members operate. An example of industry factors from the PCMA study was building overcapacity for meeting venues, meeting space, hotels, etc.
3. <u>Company factors</u>. Company factors are defined as issues within the employing organization of your members. An example of a company factor from the PCMA study was recruiting new staff with the attitudes and ability to meet the service expectations of meeting attendees.
4. <u>Professional factors</u>. Professional factors are defined as issues within the profession represented by your members. An example from the PCMA study was improving the credibility of professional meeting, convention or exhibition management as a desirable career.
5. <u>Personal factors</u>. Personal factors are defined as issues which directly impact the individual. An example from the PCMA study was developing greater personal competence in general business management or leadership skills

By creating a comprehensive understanding of the environment within which your members operate, you can identify what changes or threats might represent opportunities for the association.

Association Performance Assessment *What is the relationship of members to the association and how is this relationship reflected in their use of association programs, products, or other association initiatives?*

Members join an association to receive some determined value. How they receive this value is reflected in their choices for participation with the association. Avenues of participation can be as complex as volunteering for a committee or as simple as purchasing a book. The goal when researching this area is to identify patterns of behavior and assess the level to which the association is successfully serving members through its existing portfolio of programs, services, or initiatives. Key factors to assess within this area include factors with the greatest impact on the decision to join and the decision to retain membership. Which factors have the greatest influence on membership value and how do these factors differ for each audience?

In addition, information can be collected on the awareness of, use of, satisfaction with, and perceived value or perceived importance of individual association programs. This information provides a framework for assessing your association's current performance and for modifying existing programs and services to deliver improved value to your members. This area of research focuses on understanding the relationship between the member and the association. Also important to assess, separately from the distinct programs and services, is the role of the association in the life of the member and how this role is reflected in the emotional connection between the association and the member.

Example: American Immigration Lawyers Association

Performance Assessment

In 2006, the American Immigration Lawyers Association (AILA) conducted a comprehensive membership survey primarily designed to assess members' existing use and satisfaction with the portfolio of AILA programs and services. This portfolio included published, face-to-face, and online delivery channels and a variety of innovative staff service programs and government affairs initiatives.

The study identified that InfoNet, AILA's comprehensive online resource of immigration law information, needed to be modified to be more successful. AILA had invested significant resources in this initiative and considered it a strategic program. Staff used this information to continue modifying this program to improve its value for members.

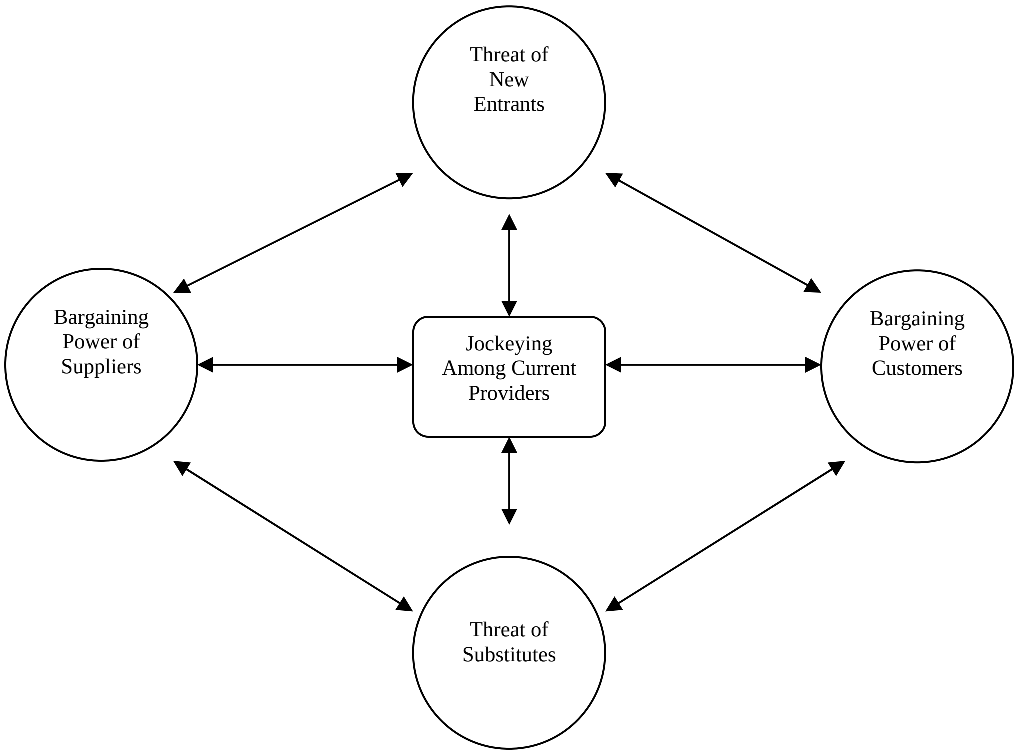
Competing Influence Assessment

What other organizations compete with the association and what is the impact of these organizations? No association operates in a vacuum. This area of inquiry identifies primary competitive influences and the criteria members use to make decisions relative to these competitors.

Michael Porter is considered the leading expert on competitive analysis. His seminal work identified Porter's Five Forces (below) that are important to the understanding of the competitive environment and the use of this information in decision making.[1]

- Jockeying among current providers. This area relates to the current competition between existing providers within a market. For example, two different associations may be attempting to serve the same market with education programs delivered through a conference.
- Threat of new entrants. The threat of new entrants relates to the potential for new organizations, such as another association, to enter the market to provide similar or directly competing programs. The greater the barriers to entry into a market, the more difficult it becomes for new organizations to enter the market.
- Bargaining power of suppliers. The bargaining power of suppliers relates to the ability of suppliers to affect the organization's flexibility to configure or provide their services. The more powerful the supplier community in a market, the less flexibility the association has in configuring product or service options because powerful suppliers can dictate terms.
- Bargaining power of customers. The bargaining power of customers relates to the ability of customers to affect the organization's flexibility to configure or provide its services. The more powerful the customer base, the less flexibility the association has in configuring its portfolio of programs, products, and services.
- Substitute products. Substitute products relate to service options different from existing solutions but which still meet the needs of customers. For example, virtual training, using advances in technology, represents a substitute educational product that reduces the market for face-to-face, hands-on training.

Understanding the relationship of Porter’s Five Forces and developing specific strategies to deal with each area is central to developing a successful strategy that reflects the realities of the competitive environment. The identification and relationship between these five forces are identified in the following diagram.



Example: American Society for Gastrointestinal Endoscopy

Competitive Analysis

In 2007, the American Society for Gastrointestinal Endoscopy was considering options for its hands-on training facility for endoscopy, the ASGE Interactive Training &Technology Center, located in Westmont, Illinois. Many strategic options were being considered, including expanding the existing facility, building a new facility, establishing relationships with other providers, and developing mobile training facilities.

As part of the strategy development process, the ASGE conducted a study of the competitive environment for hands-on training in endoscopy using Porter’s Five Forces as a model. The study identified factors critical to selection of a training provider, new entrants into the market, and a potential substitute offering on the horizon, virtual training.

By understanding the relationship between all five areas, ASGE considered an integrated strategy combining in-place training facilities with a network of association and academic medical center partners to create a more robust training environment that maximized the utilization of the ASGE facilities while providing more accessible, affordable training to members locally.

The preceding areas of inquiry provide a general framework to guide your research efforts. By considering the membership audience, member environment, competing forces, and the association's relationship to members, the association develops a comprehensive picture to guide strategy development. This framework helps you understand and prioritize in which areas you need to collect information to make strategy decisions.

Research Methodologies for Associations

The development of the research methodology can be simple or complex, depending on your research needs. A complete discussion of research methodologies is beyond the scope of this article, but some guidelines and concepts can help you narrow your focus. A specific market research methodology balances the following:

- Data type. What type of information are you trying to collect?
- Direct costs (e.g., postage, data entry). What are the direct costs of conducting the research and are these costs fixed or variable based on the methodology?
- Professional fees (if using external expertise). What type of external assistance are you engaging and what will these services provide and cost?
- Time frame (e.g., one month, several months, ongoing). What is the time frame for conducting the study, analyzing the data, and providing the report?

The optimal market research process may incorporate different methodologies designed to balance the strengths and weakness of each method while respecting the financial resources and time frame of the association.

Types of Market Research

Primary and Secondary Data Generally speaking, there are two types of data: Primary data is new data collected specifically to address the problem at hand, and secondary data is data that has already been collected through another research project. Both types of data are important. The membership executive needs to evaluate the value of existing secondary data so that new, primary data collected does not duplicate this information and adds to the association's knowledge base.

Qualitative versus Quantitative Research There are two general methods of research.[2] Qualitative research is not subject to quantification or quantitative analysis. Quantitative research is subject to mathematical or statistical analysis.

Qualitative research is used to help the association understand the in-depth motivations and feelings of a target audience. Focus groups represent a common form of qualitative research. Qualitative research is best used in conjunction with quantitative methodologies. Qualitative research provides the analyst with a more in-depth understanding of complex issues, which is helpful during analysis. Qualitative research is also used to identify potential response options that can be tested using quantitative tools.

Qualitative research is less effective in identifying small differences in the marketing mix that may have a great impact on the success of a project or program. A second weakness is that conclusions drawn from qualitative data may not be representative of the larger membership audience.

Quantitative research is used to provide more accurate, objective information that can be extrapolated to a larger audience. Common forms of quantitative research include mail or online survey instruments. Quantitative research allows the association to specifically test precise concepts. Quantitative research uses surveys that can be mailed, posted online, or done by telephone or even with on-site intercepts, such as at a conference. The key is that the results can be quantified.

Common Tools of Market Research In preparing for research, the membership professional should become familiar with the following common research tools.

Data Mining Data mining is a series of tools used to study the internal database of the association which is created by the association through existing activities. For example, dues collection often provides insight into demographics. Purchase history provides insight into popular educational content or preferred delivery channels.

> ***In 2007, the Illinois CPA Society (ICPAS) conducted a data-mining analysis of the association's data retrospectively for five years. This analysis identified key trends in participation by different age groups, which will impact how member retention strategies and retention resources should be focused. This insight was gained without surveys, or any additional information. The analysis simply compared the age of members to their event attendance, volunteer participation, and retention rate.***
>
> ***By creating an understanding of the situation using existing data, ICPAS also understood how to make subtle improvements in its data collection process and identified a key member market for additional, specific primary research.***

The use of data mining and other strategic database analysis tools represents a growing resource for associations that have invested in the collection of data about members for many years as part of other initiatives that may not have been originally conceived as research sources.

Executive Interviews An executive interview is a structured or semi structured format in which the researcher asks a series of questions to an individual selected as part of the study. This method is an excellent choice for collecting in-depth information from individuals who would be difficult to reach through other qualitative mechanisms or for which other mechanisms would be cost prohibitive.

In 2007, PCMA used a series of executive interviews to collect qualitative information about career aspirations from individuals active in the profession of convention management. Eight individuals were interviewed using the same five questions. The analyst identified common themes from these interviews for later testing with a quantitative instrument.

Focus Groups A focus group is a group of 8 to 12 participants who are led by a moderator in an in-depth discussion on one particular topic or concept. Today, focus groups can be organized as face-to-face activities or as online events. The primary advantage of focus groups is the opportunity to probe for in-depth insight or understanding of the membership audience. The primary disadvantages of focus groups are the costs and the inability to quantify the analysis or extrapolate findings to the larger membership audience.

The American Bar Association's Section on Business Law conducted professionally facilitated focus groups to identify key themes important to their brand identify. Six focus groups were held in three cities, Los Angeles, Chicago, and Philadelphia, to ensure that no geographic bias was incurred. Volunteer leaders observed some of the focus groups.

The focus groups identified practical resources as a key component of the relationship between the ABA-SBL and its large and diverse membership. Today, this finding is featured in the brand tagline, "Practical Resources for the Business Lawyer."

Focus groups can also be organized more informally, for example, at the association's annual conference. The key to focus groups is to establish a group that represents a diverse range of opinions relative to the research goals.

Paper (mailed) Surveys. Paper surveys are survey instruments that are mailed to a target audience of potential respondents. This method is one of the most common research tools for associations. Paper surveys are a robust method, allowing for the collection of a great deal of information. The greatest disadvantages of paper surveys are the direct costs for paper, postage, and data entry and the increase in data collection time necessary to account for the return of mailed surveys.

Paper surveys are best for collecting information from people that are difficult to reach through online mechanisms or in circumstances where the person's ability to participate online may in fact bias the data collected. The introduction of online surveys has reduced the use of paper surveys. Online surveys are often less expensive and offer the researcher greater question flexibility for less cost.

Online Surveys Online surveys are similar to paper surveys but are administered via the Internet. The capabilities of the online format allow for a more robust data collection instrument and faster turnaround time without additional expenses for paper and postage. The primary disadvantage of online surveys exists when online access to members is restricted because of members' Internet security protocols or other technological limitations.

In 2007, the National Association of the Remodeling Industry conducted an online needs assessment of its membership. The cost savings from the online survey format allowed the association to survey all its members instead of a sample. Online surveying provides virtually every member with the opportunity to respond and yields a greater volume of data for analysis.

Also in 2007, the American Society for Gastrointestinal Endoscopy conducted a competitive environment scan for hands-on training in endoscopy. Because of the extremely short time frame (three weeks), ASGE conducted an online survey and, thus, more than 10 percent of their members provided information in just two weeks.

Telephone Surveys Telephone surveys can be used for both qualitative and quantitative research. Commonly, members of a particular audience are contacted and led through a structured or semi-structured interview process. The primary advantage of telephone interviews is the ability to collect data very quickly. The primary disadvantage is the limitation on the number and type of questions that can be asked before respondent fatigue begins to influence the results.

In 2005, International Association of Conference Centers was in the midst of an extensive strategy development process. The association had already decided to conduct an online survey to collect information. During the research design process, IAAC determined that the information about its credential collected through this method would be insufficient. But staff decided a separate online survey about its credentialing would be confusing, since it would mean two online surveys in the field at the same time.

As a result, IAAC implemented a telephone survey of its primary member representatives to ask distinct questions about the IAAC credential. A sample of 100 members was contacted by telephone and asked a series of questions regarding the credential. This information was later appended to the online survey data to create a more comprehensive view of member opinions during the analysis.

Mixed Mode Surveys A mixed mode survey strategy combines different types of surveys into a single process. For example, an online survey will be combined with a mailed survey. Mixed mode survey strategies are the most comprehensive form of data collection and provide a greater volume and quality of data for analysis. The primary disadvantage is the additional costs involved and the longer time frame for instrument development and data collection.

> ***The North Carolina Academy of Family Physicians was conducting its first membership needs assessment in about a decade. The association decided it was important that each member have an opportunity to respond to the survey. However approximately 1/3 of the membership had not provided an up-to-date e-mail address to the association. The result was a research methodology that combined an online survey with a paper, mailed survey. The paper survey was mailed to non-respondents to the online survey and to members who had not provided an up-to-date e-mail.***
>
> ***Later analysis concluded that there were no differences in the opinions of paper survey respondents versus online survey respondents but that the association's investment in the paper survey was important for giving every member the opportunity to provide input.***

Whom should we survey?

The sampling plan outlines who will be included in a research study. Depending on the research objectives and size of the target audience, the association can survey a sample of the target audience or conduct a complete census, including every member or stakeholder.

There are many types of sampling plans, but the goal of all sampling plans is to identify a potential respondent group of sufficient size and with the proper characteristics to ensure sufficient data quality for analysis.

Survey Deployment and Analysis

The development and implementation of the survey instrument varies by method but there are some common steps:

1. Develop a list of initial questions tied to the research goals.
2. Determine question and response format.
3. Establish questionnaire flow and layout.
4. Evaluate the questionnaire and layout.
5. Deploy the survey instrument.
6. Collect, edit, and analyze research data.

When developing the research plan, these steps should act as a guide for the creation of the specific research implementation strategy.

Analyzing Research Results

Analyzing research results is an ongoing process that creates a dialogue among the users of data. Users should look for patterns in the data and reconfigure the data as needed to address specific research goals.

Analyzing research data is a complex undertaking. Misinterpretation of research data—the researcher coming to the wrong conclusions—can harm the association's strategy development because it may encourage the association to pursue a strategy at odds with the realities of the marketplace. To minimize this risk, the association executive must take a common-sense, methodical approach to reviewing the information, developing conclusions, and communicating recommendations.

The development of your research process should be designed to produce quality information without bias. Three major types of survey bias or error in survey research should be considered.[3]

1. Sampling bias. These are errors that result from chance variation. Chance variation is the inevitable difference between the sample value and the true value of the sample mean. This error cannot be avoided, only reduced by increasing the sample size.
2. Systematic bias. Systematic bias is error that results from poor research design or execution. The development and implementation of a quality research project takes specific expertise and experience. If the project is poorly designed or executed, flaws in the data may result.
3. Measurement bias. Measurement bias is error that results from a discrepancy between the information being sought and what is actually obtained by the measurement process.

The following steps are important to the analysis:

- Determine the quality of your research data. As discussed earlier, sampling bias is addressed by managing the size of the sample. Systemic bias is addressed through the creation and implementation of a quality research process.
- Review the results given your expectations of the response to determine the extent of any measurement error. While some error is inevitable, understand the differences between your expected and collected information, take this into account, and adjust your analysis accordingly.

- Review the data objectively, without a predetermined set of conclusions or biases. This is perhaps the most difficult step in the analysis. If the researcher approaches the analysis with a pre-existing bias, the final analysis and recommendations will reflect this bias and affect association performance.
- Review the data skeptically. The researcher must understand not only what the data says but also what is does not say. Don't look for answers that are not supported by the data collected.
- Focus not just on individual pieces of information but also on patterns of information that represent a more complete depiction of respondents' attitudes and opinions.

In summary, the analysis consists of two components; what the research knows, based on the data and what the research suspects based on an interpretation of the data. The final analysis must be clear between these two points of view.

Presenting research results to decision makers. One of the most challenging aspects of research is to make the resulting information and recommendations actionable. Too often a quality research study simply acts as an impressive doorstop because decision makers don't understand the information or don't understand how to apply the information to their problems. Membership research can fulfill three functional roles: descriptive, diagnostic and predictive.

- The descriptive role includes gathering and presenting statements of fact. For example, 20 percent of respondents are between the ages of 25 and 30 years old.
- In the diagnostic role, data or actions of a particular target market are explained. A common diagnostic question is satisfaction. A question is used to collect member satisfaction on each of the top 10 programs or services. Programs that are rated lower in satisfaction are given priority for review.
- The predictive role involves collecting data to help anticipate future behavior. For example, a study might ask, "How critical will each of the following industry issues be to your company over the next three years?"

A good market research study helps the association balance these three areas to provide the highest quality and most useful information for decision making. To provide a quality research report, consider the responsibilities of the researcher:

- First, you must determine the quality of the data. Poor data or inappropriate data should not be included in your study. If you discover that respondents had difficulty answering a question, simply remove this data from the analysis.

- Second, you must analyze the data correctly. There are a wide variety of analytical techniques to review data, but first and foremost, the researcher should use common sense. Review the data with an open, objective mind.
- Third, look for insights that lie behind the data. Consider the following metaphor. If you want to know which way the wind is blowing you don't look for the wind. Instead you look at which way the branches or leaves of a tree are blowing. A great deal of research can be categorized as showing the leaves blowing in the trees. A good researcher asks what lies behind the research. What is driving the response?
- Fourth, present the information in context to the decision being considered. A list of tables and charts is not helpful if the information contained is not directly applied to the decision. Don't force decision makers to configure the data to meet their needs; this is the job of the researcher.
- Fifth, present the information in context. Individual data points communicate information not insight. Only by placing the data within the overall context of the decision can the decision-maker understand how to use the information effectively.
- Finally, tell the story. You are responsible not only for providing information but also for telling decision makers what you think it means. Provide insight, not just data.

Engaging a Research Consultant

Many associations conduct high quality research without engaging external assistance, while others rely on external partners for virtually all aspects of their data collection, analysis, and reporting. The key is to understand the scope of your research activities and the association's internal capacity and capability to conduct research.

The market research industry is highly specialized and fragmented. A company that is outstanding at producing an online survey may have no expertise in qualitative research. An organization with substantive knowledge of one industry may have no experience in helping organizations in other industries. Within the supply chain of research there is a great deal of fragmentation. Consider the following simple example for producing of an online survey.

- First a research company representative needs to get the research business. This is often a company principal or related executive manager.
- Second, an analyst or researcher must design the research methodology and create the questions that will be asked.
- Third, an individual will be responsible for programming the HTML language, managing the e-mail deployment and generally overseeing the physical creation and deployment of the survey.

- Fourth, an individual may be responsible for statistical quality control and analysis.
- Finally, an individual may be responsible for recommendations and reporting.

While a separate person may not be responsible for each step, this simple example reveals the diverse steps within a research process. The process requires a human, technological, and physical infrastructure to be successful. The more research you conduct, the more an investment in this infrastructure makes sense for the association. The more likely scenario is that the association will purchase the infrastructure and insights from an external research provider.

Benefits of External Research Assistance

An exchange of money for access to research capacity -few association staff members are sitting around with nothing to do but conduct research. By contracting with an external resource, the association trades financial resources for the capacity to conduct the study.

Specialized expertise - many research companies have special industry or strategy expertise. By contracting with these companies, the association gains their expertise and experience with these issues.

Objectivity - an external resource looks at your information with a fresh eye. This provides new insight or ideas in areas where the association might be struggling.

Independence - an external resource will be an independent voice unbiased by politics or other legacy issues that may stand in the way of effective analysis.

As the volume of research conducted by the association increases, the value of developing an internal capability for research increases. In addition, the more objectivity, independence, and specialized expertise are critical to the analysis and recommendations, the more an external resource adds value. For most associations, a combination of internal capability and external support are the best option.

To create an optimal research infrastructure consider the following simple process.

1. Assess the past and current research activity of the association. What research have you been doing and why? What has been the result of this research?
2. Identify desired research needs of both staff and volunteer leaders. What information is required or desired to make decisions.
3. Identify gaps between current and desired research needs. Based on the gap, develop a structure to help you meet your research needs within the resources you have available.

To determine your external support needs, it can be helpful to conduct an internal research audit. See Appendix: Research Audit Questions.

Membership research is a tool to help membership executives develop and implement successful membership strategy. Competent membership professionals will be familiar with the use of membership research to guide decisions and develop strategy.

1 Michael E. Porter. *On Competition*. (A Harvard Business Review Book, 1979)
2. Carl McDaniel and Roger Gates. *Marketing Research Essentials*, 3rd Edition.
3. Carl McDaniel and Roger Gates. *Marketing Research Essentials*, 3rd Edition.

Appendix: Research Audit Questions

The following questions provide a simple process to assess the internal capacity and capability of the association to conduct research. By answering these questions, the association gains an understanding of what human, technical and external resources might be necessary to implement an effective, ongoing research process to guide decisions.

1. What research has been conducted within the last three years?
2. What was the purpose, reason, or rationale for this research?
3. How or by whom was this research initiated?
4. What were the goals of the research?
5. What type of research was conducted?
    a. Qualitative
    b. Quantitative
    c. Integrated or combined methodologies
    d. Other
6. What tools were used to collect the information?
7. Who conducted the research?
8. Was the research a single project or is it ongoing?
9. Who were the primary users of the information?
10. How was the research used to improve decision making?
11. What is the key decision maker or project leader's evaluation of the research?
12. What was the actual or estimated cost of the research?
13. What future research projects are currently anticipated or included within the planning cycle?
14. What challenges or opportunities are currently driving a desire for increased research, analysis, or other membership or market understanding?
15. What are gaps in the understanding of key decision makers regarding the association's products, services, or markets?
16. What is your internal capacity and capability to conduct research?
17. What external support is necessary to conduct research you believe is essential to quality decision making?

About Association Laboratory

Association Laboratory specializes in the research and development of association business strategy. The award winning company serves a nation-wide client base of the nation's leading associations and is recognized as one of the industry's premier voices on the creation of sustainable organizational, marketing and delivery strategy for associations.

Dean West, President of Association Laboratory and author of this article is a nationally recognized expert in association research and membership strategy. He is a fellow of the American Society of Association Executives and a former Board member for the Association Forum of Chicagoland. In addition, Mr. West is a former executive director who began his career in association management in 1987.

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