

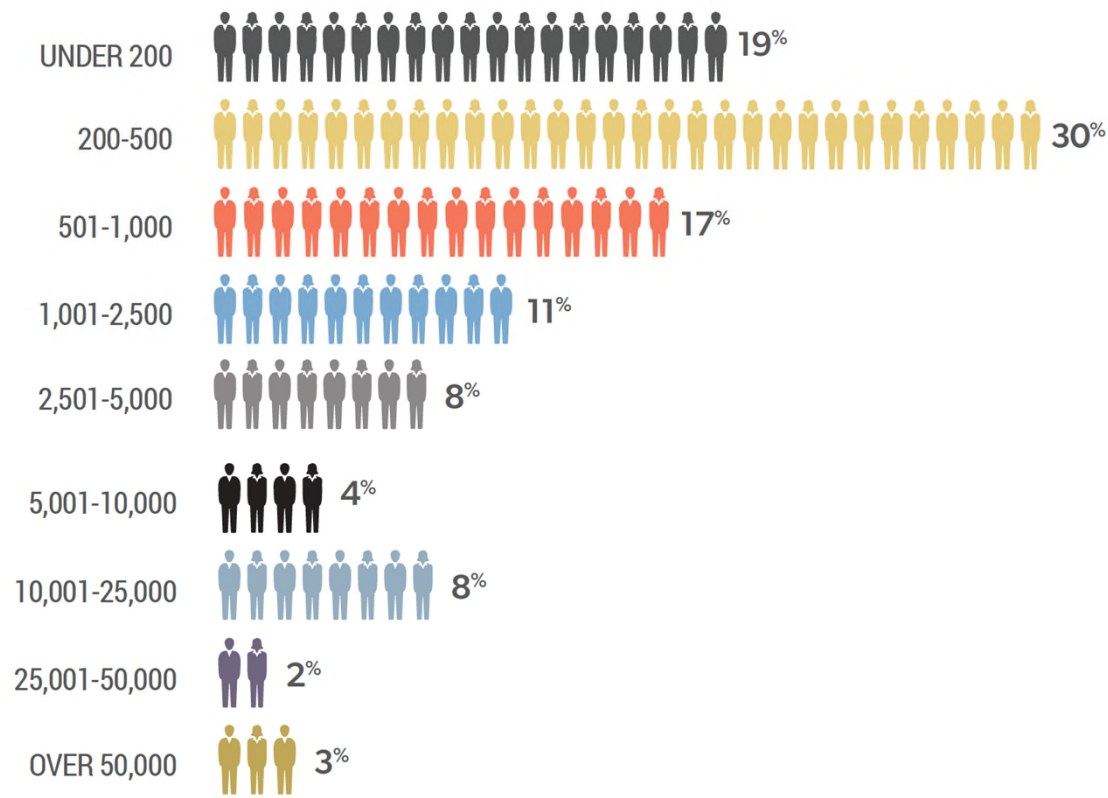
20 21 ASSOCIATION SURVEY RESULTS

2021 ASSOCIATION

ANNUAL SURVEY RESULTS

ABOUT THE RESPONDENTS

NUMBER OF MEMBERS | PREDICTED MEMBER COUNT ON 1/1/2021

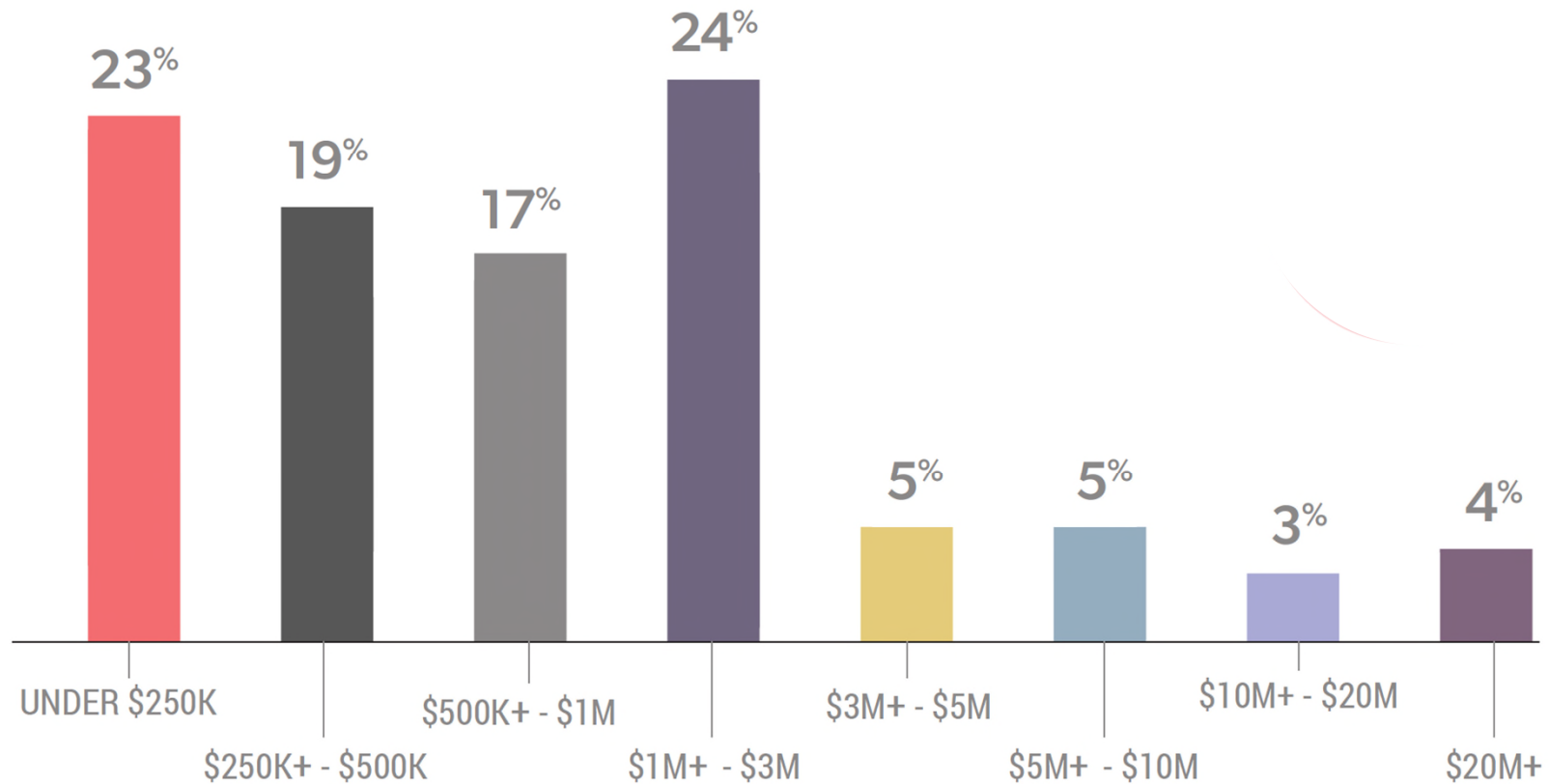


2021 ASSOCIATION

ANNUAL SURVEY RESULTS

ABOUT THE RESPONDENTS, cont.

ANNUAL OPERATING BUDGET | APPROXIMATE



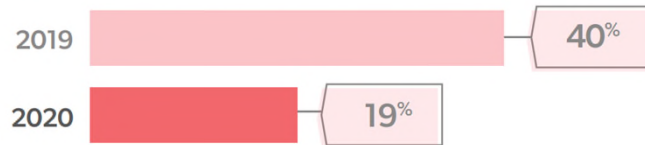
2021 ASSOCIATION

ANNUAL SURVEY RESULTS

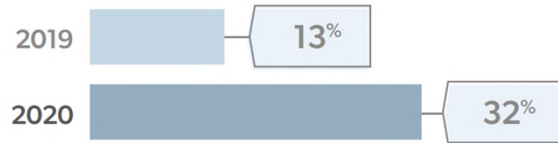
MEMBERSHIP GROWTH

ANNUAL OVERALL **NET** MEMBERSHIP | YEAR-OVER-YEAR CHANGE

INCREASED | RESPONDENTS REPORTING A HIGHER OVERALL MEMBERSHIP COUNT



DECREASED | RESPONDENTS REPORTING A LOWER OVERALL MEMBERSHIP COUNT



UNCHANGED | RESPONDENTS INDICATING BASICALLY NO CHANGE IN OVERALL MEMBERSHIP COUNT

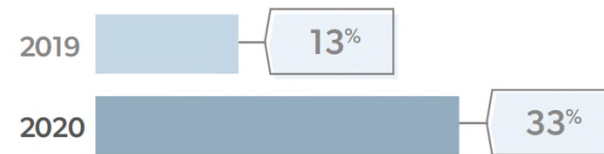


ANNUAL OVERALL **NEW** MEMBERSHIP | YEAR-OVER-YEAR CHANGE

INCREASED | RESPONDENTS REPORTING A HIGHER NEW MEMBERSHIP COUNT



DECREASED | RESPONDENTS REPORTING A LOWER NEW MEMBERSHIP COUNT



UNCHANGED | RESPONDENTS INDICATING BASICALLY NO CHANGE IN NEW MEMBERSHIP COUNT



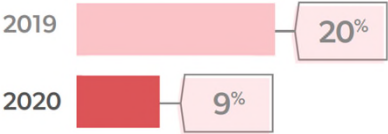
2021 ASSOCIATION

ANNUAL SURVEY RESULTS

MEMBERSHIP RETENTION

ANNUAL **OVERALL** RENEWAL RATE | YEAR-OVER-YEAR CHANGE

INCREASED | RESPONDENTS INDICATING A HIGHER OVERALL MEMBER RENEWAL RATE ^



DECREASED | RESPONDENTS INDICATING A LOWER OVERALL MEMBERSHIP COUNT v



UNCHANGED | RESPONDENTS INDICATING NO CHANGE IN OVERALL RENEWAL RATE <>



ANNUAL **NEW-MEMBER** RENEWAL RATE | YEAR-OVER-YEAR CHANGE

INCREASED | RESPONDENTS INDICATING A HIGHER NEW-MEMBER RENEWAL RATE ^



DECREASED | RESPONDENTS INDICATING A LOWER NEW-MEMBER RENEWAL RATE v



UNCHANGED | RESPONDENTS INDICATING NO CHANGE IN NEW-MEMBER RENEWAL RATE <>

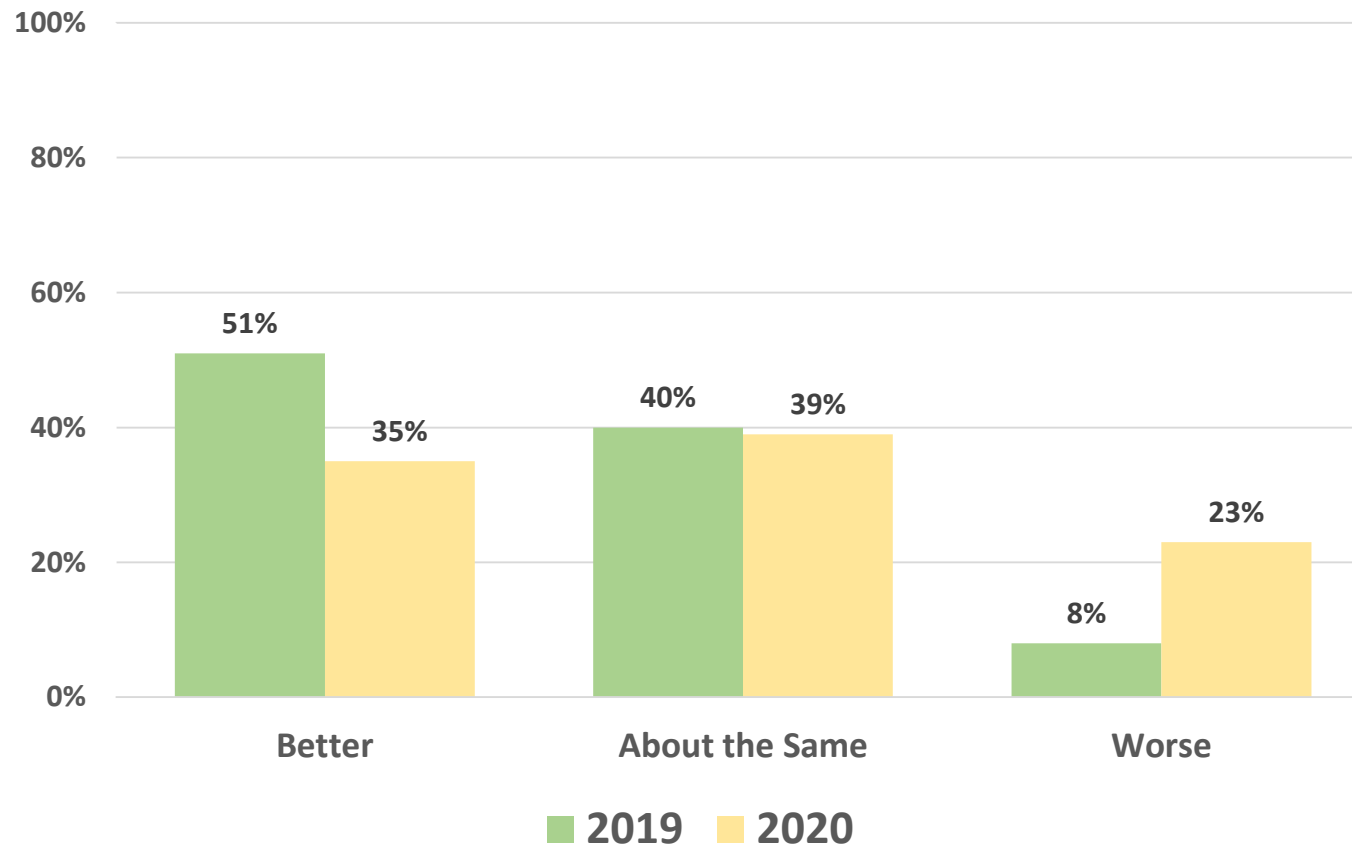


2021 ASSOCIATION

ANNUAL SURVEY RESULTS

MEMBER ENGAGEMENT

OVERALL MEMBER ENGAGEMENT | YEAR-OVER-YEAR CHANGE



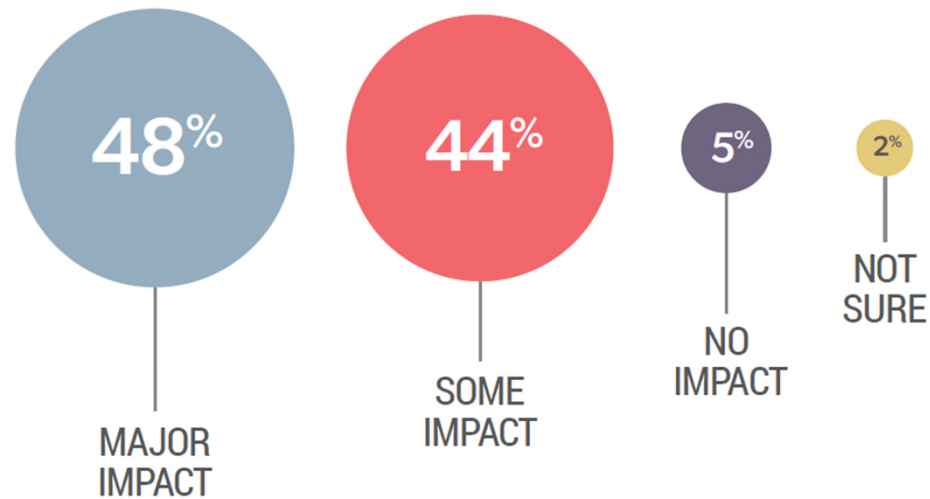
2021 ASSOCIATION

ANNUAL SURVEY RESULTS

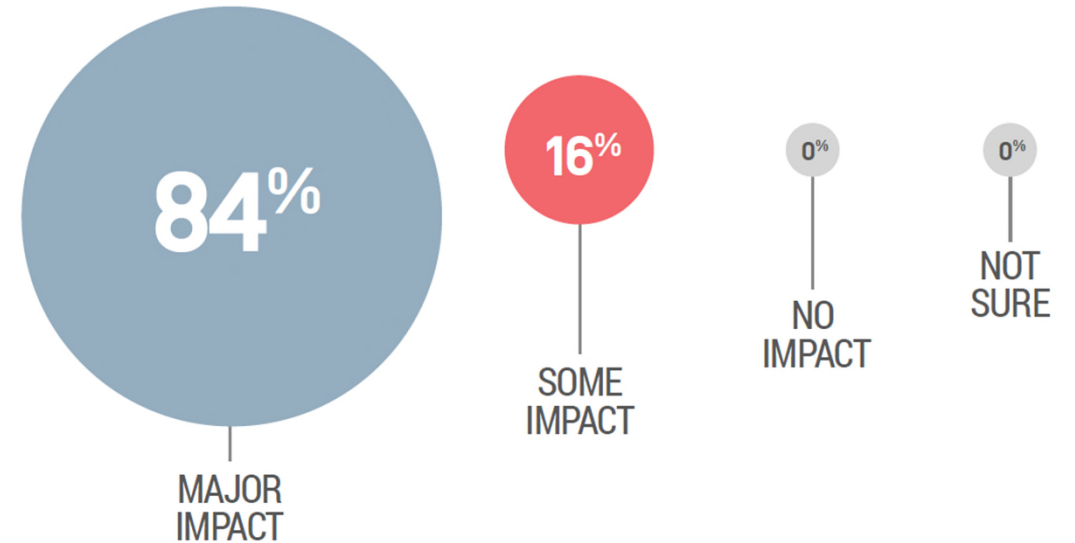
MEMBER ENGAGEMENT, cont.

MEMBER ENGAGEMENT **CHANGES** | HOW MUCH HAS COVID CONTRIBUTED TO THIS CHANGE IN THE ENGAGEMENT RATE?

RESPONDENTS INDICATING **INCREASED** ENGAGEMENT SAID COVID HAS HAD:



RESPONDENTS INDICATING **DECREASED** ENGAGEMENT SAID COVID HAS HAD:



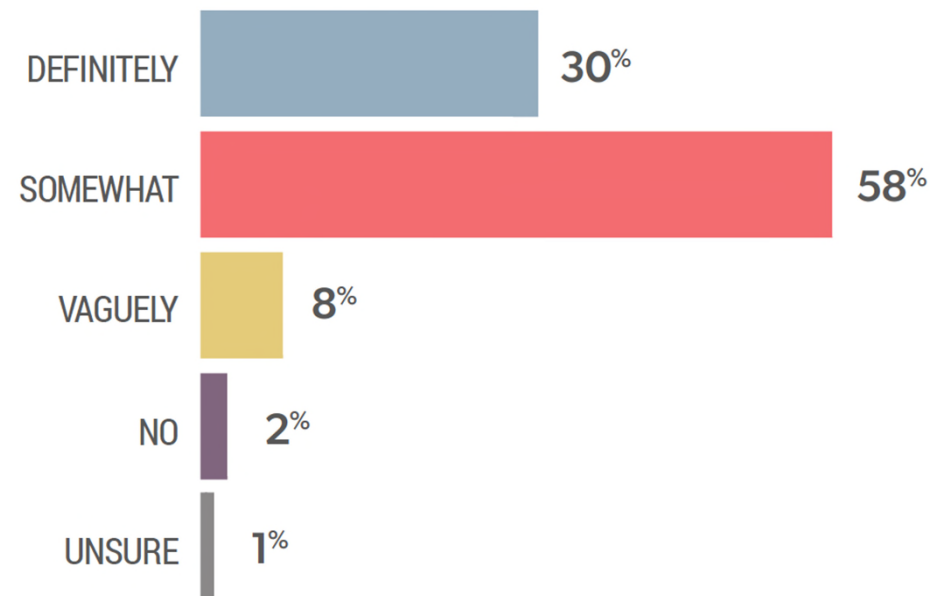
2021 ASSOCIATION

ANNUAL SURVEY RESULTS

VALUE PROPOSITION

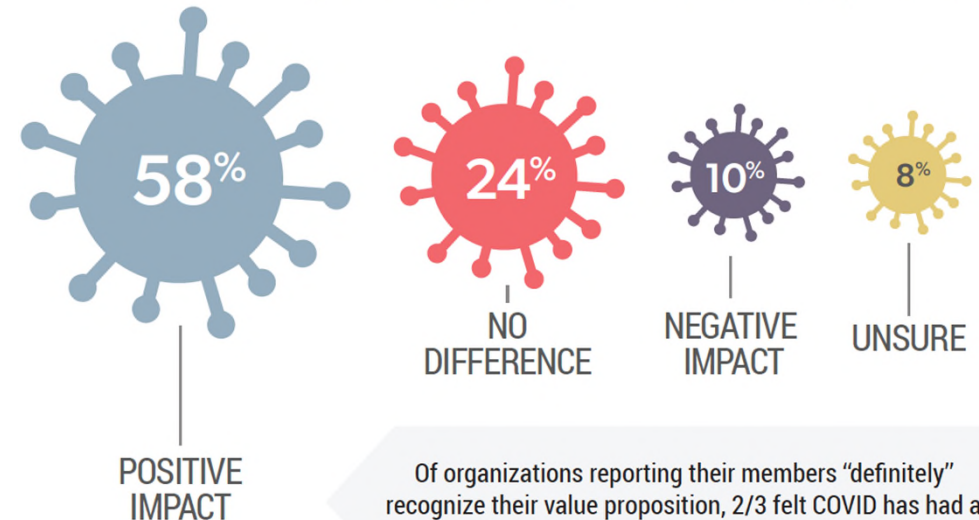
MEMBER RECOGNITION

Do you think members recognize your association's value proposition?



COVID IMPACT

In general, how would you say COVID has affected members' opinions of your organization's value proposition?



Of organizations reporting their members "definitely" recognize their value proposition, 2/3 felt COVID has had a positive impact on members' perception of value.

2021 ASSOCIATION

ANNUAL SURVEY RESULTS

VALUE PROPOSITION, cont.



201-500
MEMBERS

Organizations with 201-500 members were most likely to report their members “definitely” recognize their value proposition.



\$1M-3M
BUDGET

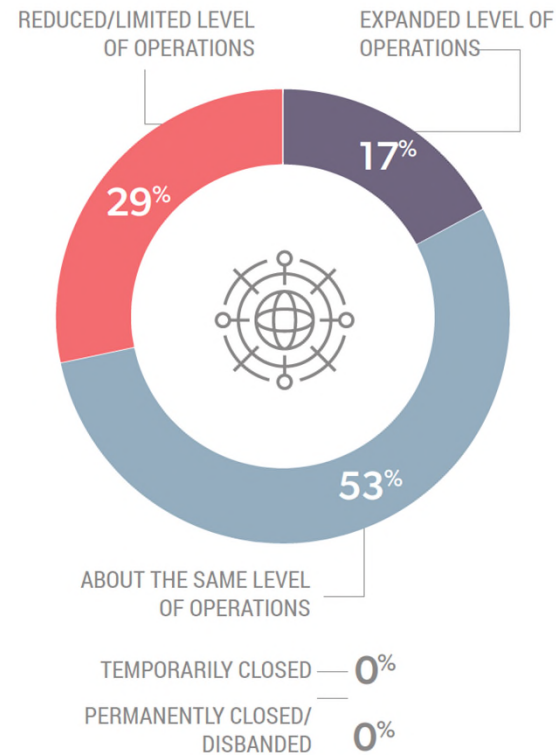
Those with an operating budget from \$1m-\$3m were most likely to report their members did not recognize their value proposition.

2021 ASSOCIATION

ANNUAL SURVEY RESULTS

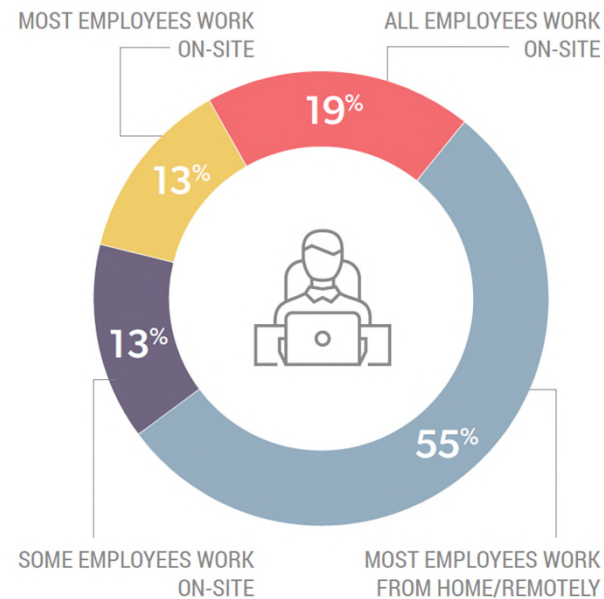
OPERATIONS

What is the current operational status of your organization?

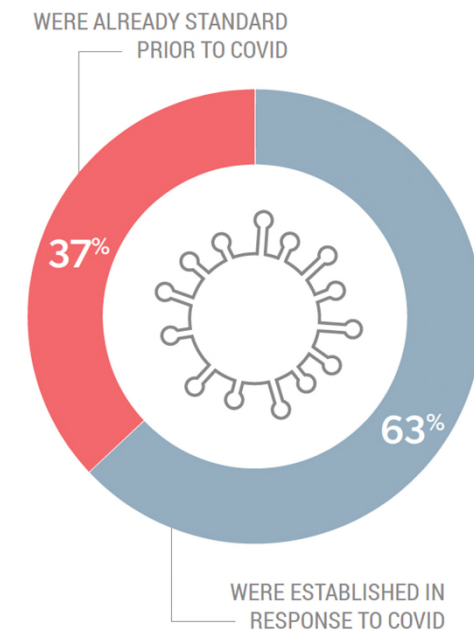


OPERATIONS STATUS

Which of the following best describes your organization's current remote/work-from-home arrangements?



The referenced work arrangements:



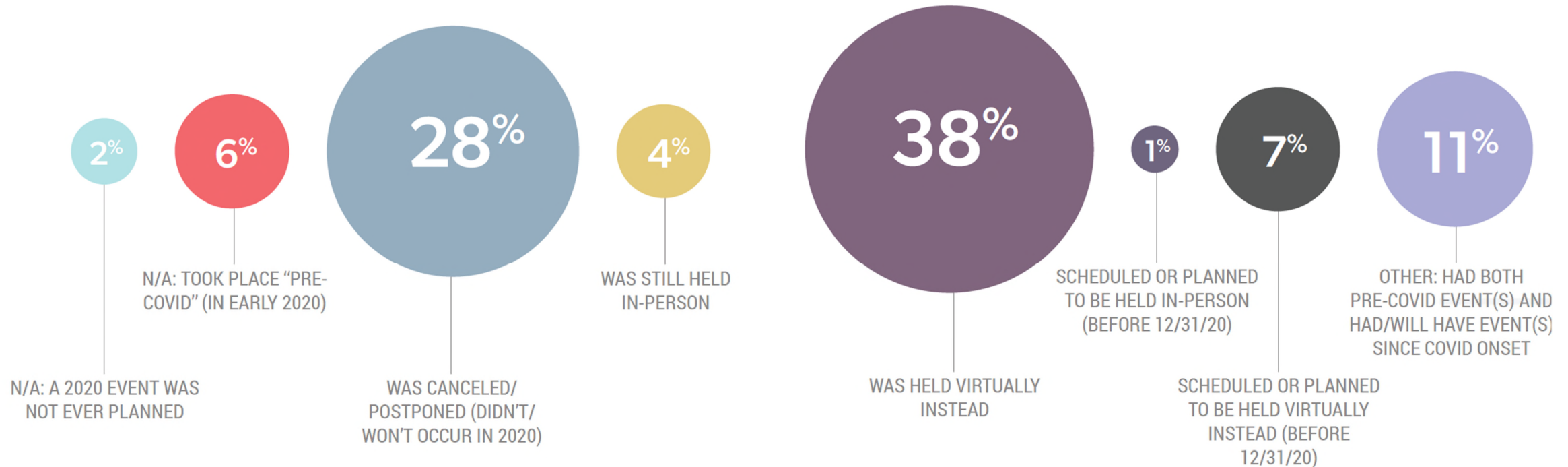
2021 ASSOCIATION

ANNUAL SURVEY RESULTS

OPERATIONS, cont.

EVENTS

Since the onset of COVID in mid-March, how did/will your organization handle its 2020 MAJOR, in-person event(s)? (e.g., annual meeting/banquet, conference, trade show, etc.)



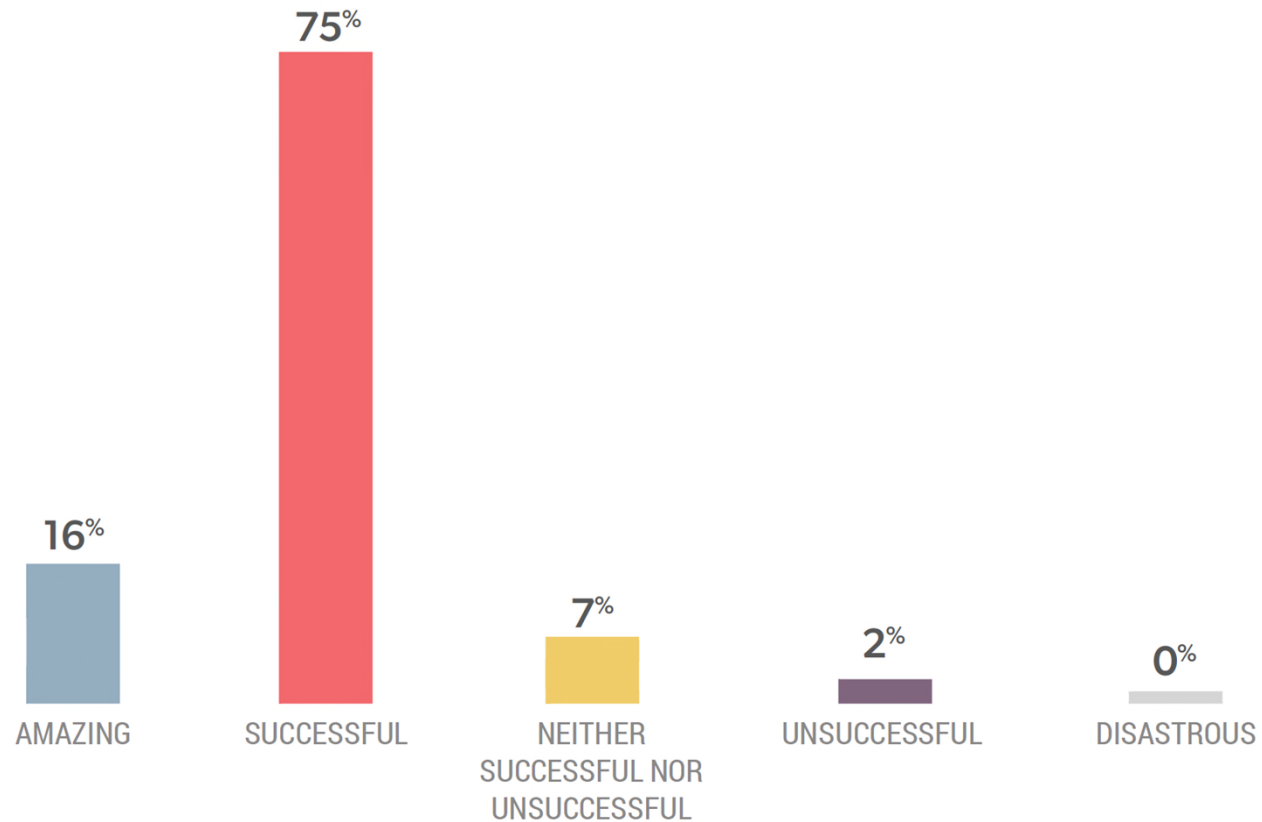
2021 ASSOCIATION

ANNUAL SURVEY RESULTS

OPERATIONS, cont.

EVENT RESULTS | THOSE WHO HELD VIRTUAL EVENTS

Overall, under current circumstances, how would you rate the success of the virtual event(s)? (Not in comparison to past years or in-person events.)



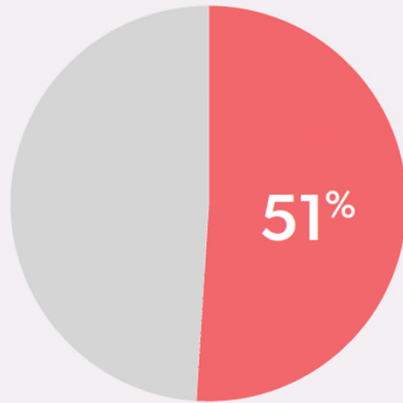
2021 ASSOCIATION

ANNUAL SURVEY RESULTS

REVENUE

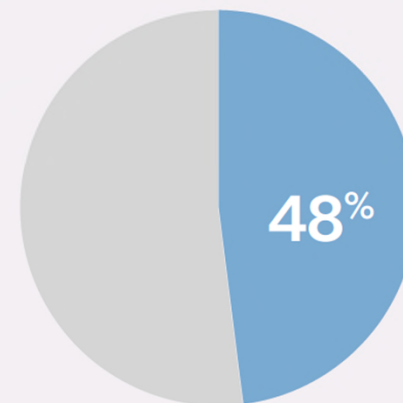
NON-DUES REVENUE | PRE- VS. POST-COVID PROJECTIONS

We asked: **In an average year**, approximately how much of your total revenue comes from non-dues sources?



Average of all responses

We asked: **This time next year**, how much of your total revenue will come from non-dues sources?



Respondents predicted

2021 ASSOCIATION

ANNUAL SURVEY RESULTS

REVENUE

NON-DUES REVENUE | TOP 10 SOURCES

We asked: Since the onset of COVID, what has been your organization's most successful source of non-dues revenue?



SPONSORSHIPS



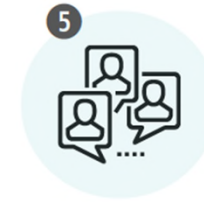
VIRTUAL EVENTS



EDUCATION



CONTRACT INCOME



PROGRAMMING



GRANTS



AFFINITY PROGRAMS



ADVERTISING



WEBINARS



GOLF TOURNAMENTS

Of those reporting golf tournaments as their top source of non-dues revenue, the majority specified the event was a summertime, "no-touch" golf tournament.

2021 ASSOCIATION

ANNUAL SURVEY RESULTS

REVENUE, cont.

THOSE REPORTING OVER ½ OF THEIR INCOME COMES FROM NON-DUES REVENUE SAID:

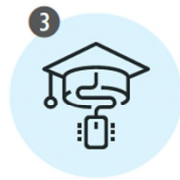
Since the onset of COVID, their most successful non-dues revenue sources are:



SPONSORSHIPS



VIRTUAL
EVENTS



EDUCATION



CONTRACT
INCOME



PROGRAMMING



GRANTS



WEBINARS

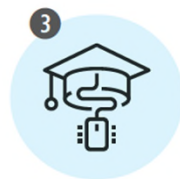
Predicted next year's most successful non-dues revenue sources will be:



SPONSORSHIPS



VIRTUAL
EVENTS



EDUCATION



GRANTS



CONTRACT
INCOME



PROGRAMMING



FUNDRAISERS

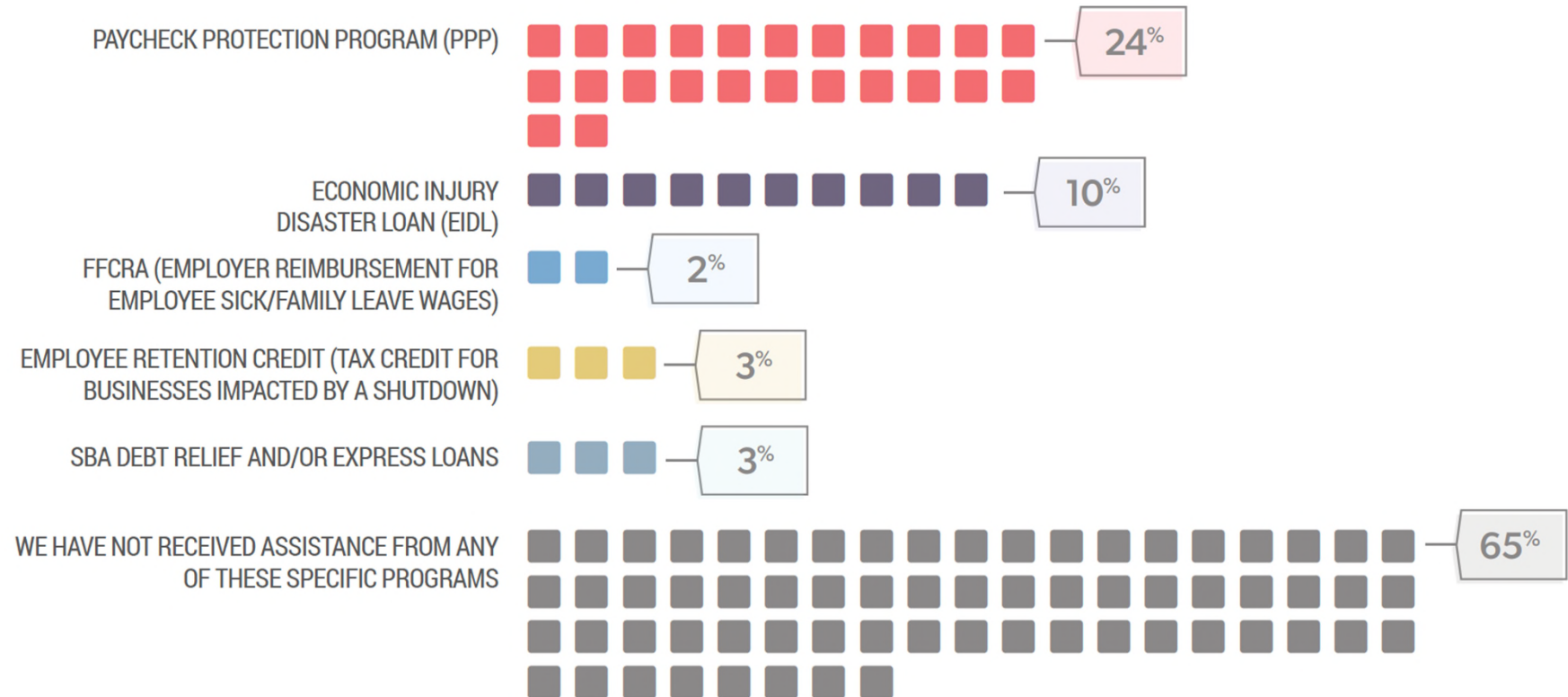
2021 ASSOCIATION

ANNUAL SURVEY RESULTS

FINANCE

COVID RELIEF | GOVERNMENT PROGRAMS

Please indicate if, since the emergence of COVID, your organization has received assistance from any of these SPECIFIC relief programs:

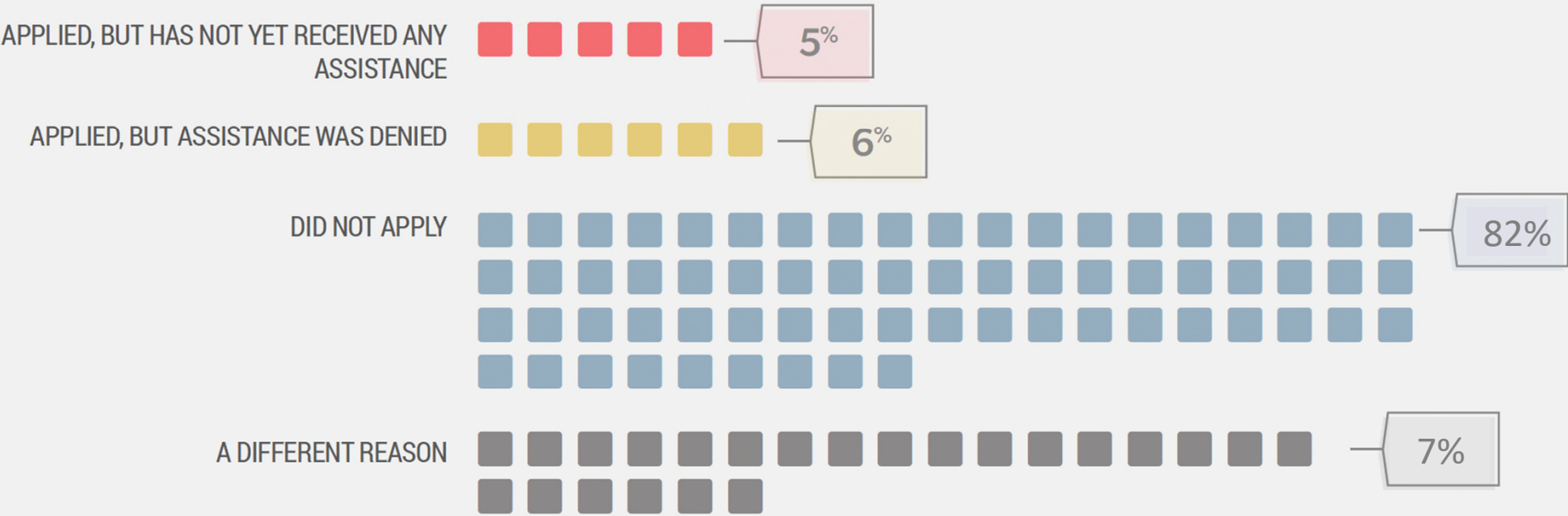


2021 ASSOCIATION

ANNUAL SURVEY RESULTS

FINANCE, cont.

Respondents **not receiving** assistance from the programs listed above indicated their organization:

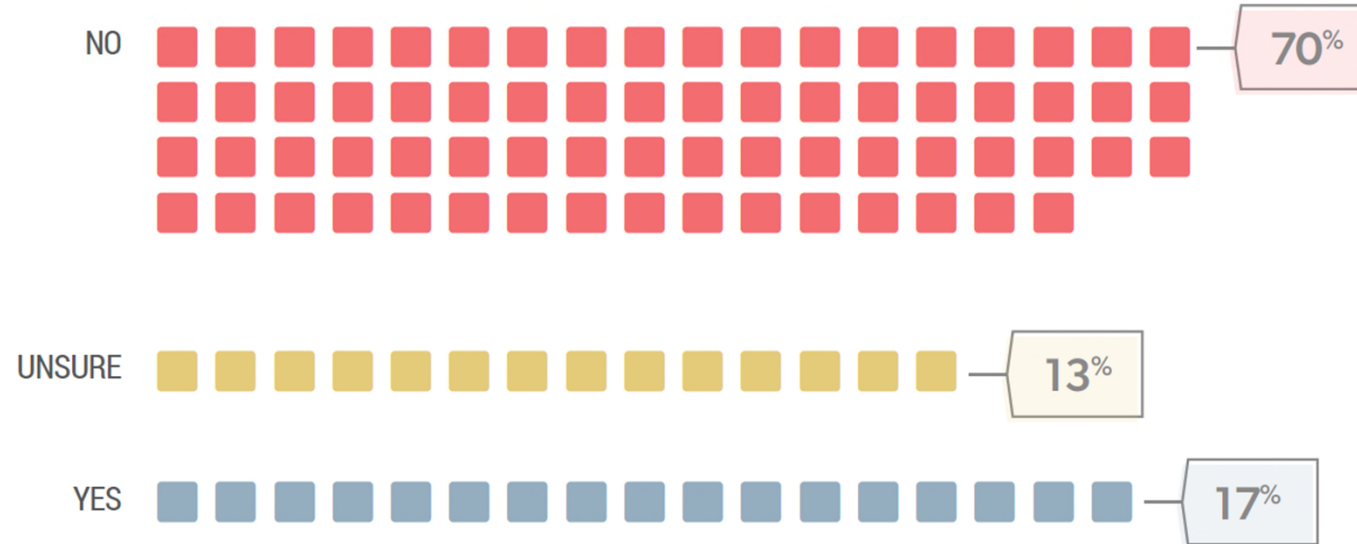


2021 ASSOCIATION

ANNUAL SURVEY RESULTS

FINANCE, cont.

Since the onset of COVID, has your organization received any grants, loans, relief funding, assistance, etc. **from any sources other than those listed above?**

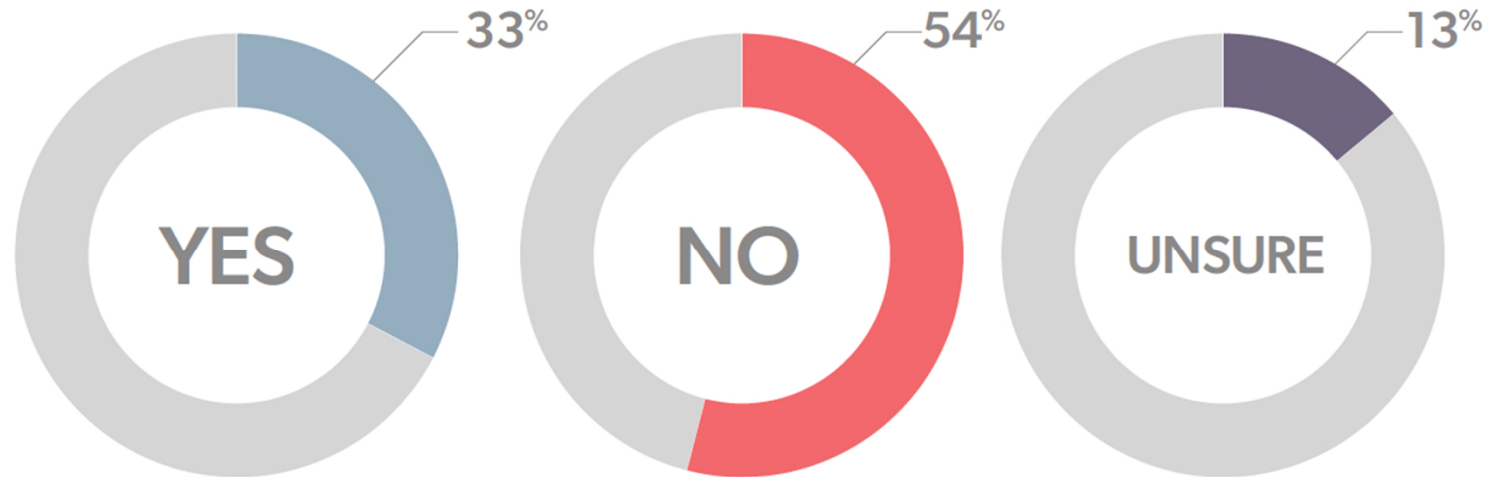


2021 ASSOCIATION

ANNUAL SURVEY RESULTS

DIVERSITY & INCLUSION, cont.

In the past 12 months, has your organization made changes to its Diversity & Inclusion policies/practices in an effort to improve equity and support for employees and/or members?



2021 ASSOCIATION

ANNUAL SURVEY RESULTS

DIVERSITY & INCLUSION, cont.

Updated D&I practices were most common among organizations falling into at least one of the following categories:



201-500 members



An operating budget of
\$1m-\$3m



Improved year-over-year
engagement rates

Of organizations indicating changes to D&I policies/practices:
29% reported increased membership engagement vs. only 15% of
those who did not make changes.

Interestingly, organizations that **did not** make a change to D&I policies/practices reported a higher or steady renewal rate than those that did.

2021 ASSOCIATION

ANNUAL SURVEY RESULTS

DIVERSITY & INCLUSION, cont.

- ✓ We reviewed our existing policies to consider changes and found them to be comprehensive.
- ✓ We have those programs in place, specifically women, and have a diverse Board of Directors and membership base.
- ✓ We are already diversified.
- ✓ The program was already in place.
- ✓ It is not an issue for our organization.
- ✓ We previously adopted a formal policy.
- ✓ Have been conducting bias training with our Board of Governors & Committee Chairs.
- ✓ We started a Diversity, Equity, and Inclusion (DEI) Committee, which developed Core DEI Principles and helped implement changes to make our organization more welcoming and inclusive.
- ✓ Created a D&I committee and re-upped efforts to engage minorities in our industry.
- ✓ Our Board formed a D&I Task Force.
- ✓ We have created a Diversity Committee and are in the process of appointing members.
- ✓ We started an anti-racism task force and are actively implementing suggestions.
- ✓ No changes yet, but we are investigating and will make changes once that is complete.
- ✓ Planning to take a look at the Employee Handbook in the next year to evaluate it in the current era.
- ✓ Unfortunately, we've been stagnant in this area. We've created a core values statement for our bylaws but haven't moved much toward being proactive with the membership. There seems to be a lack of appetite for this, and the reasons are unclear to me.
- ✓ They are ensuring that we have programs in 2021 to address this.
- ✓ We did not have a "policy" but did make a statement on it this year.
















2021 ASSOCIATION

ANNUAL SURVEY RESULTS

OPERATIONS, cont.

What would you say is the #1 impediment to doing your job?

COMMON CHALLENGES

 Time	 Processes/Operations	 Leadership
 Money	 Board of directors	 Uncertainty
 Technology	 Member engagement	 Volunteers
 Staff	 Remote workforce	
 Events	 Other/Miscellaneous	
 Face-to-face interaction	 Government	

2021 ASSOCIATION

ANNUAL SURVEY RESULTS

JOB IMPEDIMENTS

BOARD OF DIRECTORS

The Board has an unrealistic vision of what they can or will actually achieve. They make decisions, but then they don't carry out their responsibilities.

Poor communication from the Board of Directors; slow responses or indecision.

Board members have too many other obligations and concerns, especially during the pandemic, to be available for the organization's needs.

FACE-TO-FACE INTERACTION

Lack of in-person meetings with staff.

Not being able to hold meetings or events in person.

The lack of opportunity for members to engage.

Membership sales and retention are relationship-based, and it has been more difficult to connect directly with members and prospects.

VOLUNTEERS

Limited availability of volunteer leaders.

Inconsistent volunteer leadership creates a lack of understanding of the role and value of staff.

LEADERSHIP

Lack of focus among senior leadership. As an organization, we try to do too much instead of focusing on fewer initiatives but doing them exceptionally well.

Not enough resources nor a supportive leader. No real teamwork.

Lack of organizational structure and management.

MEMBER ENGAGEMENT

COVID-related member disinterest because they're too busy or don't care and don't see the value.

Lack of engagement among members makes it hard to secure non-dues revenue sources.

2021 ASSOCIATION

ANNUAL SURVEY RESULTS

JOB IMPEDIMENTS, cont.

FINANCIAL

Tight funding due to 2020 event cancellation has resulted in the Board being more cautious than usual. They're reluctant to try new things, even to expand our development pie or member engagement. I feel like we need to be bolder now more than ever, but it's a battle.

Funding for appropriate technology for virtual professional development.

Lack of sufficient funds to develop and upgrade training programs. Revenue has been sufficient to pay our bills and have a little surplus, but not enough to do new-development initiatives this year.

STAFFING

Lack of staff - volunteerism is not at previous levels, and it has gotten tougher with COVID.

Too much to do and lack of skilled staff to delegate tasks.

Due to cutbacks/financial constraints, there is not enough staff to execute members' service needs.

GOVERNMENT

Economics/bad government policies.

The struggle due to governmental agencies not returning to work/office hours. Our state continues to be largely locked down with lots of restrictions on all industries.

The inability to meet with elected officials in-person.

REMOTE WORKFORCE

Lack of office collaboration - no "water cooler" opportunities.

Work product and productivity on a day-over-day basis are slipping considerably. Unfortunately, the remote work concept is dysfunctional and/or limiting work product productivity.

Reduced communication. Things like walking down the hall or picking up the phone to ask someone something are no longer possible. Communication has to be planned.

2021 ASSOCIATION

ANNUAL SURVEY RESULTS

JOB IMPEDIMENTS, cont.

TECHNOLOGY

Member handholding - their need to speak to a staff member to take care of a business need that a better AMS could handle electronically.

We need a software system that covers all of our needs.

Multiple databases/info sources that don't talk to each other.

PROCESSES AND OPERATIONS

Administrative strangulation... employee manuals, office templates, timely marketing content for social media.

Siloed operations within staff.

Day-to-day needs preventing more big picture strategic planning work. Being bogged down with grant reporting, financial needs, personnel requirements, etc., prevents advancing our strategic goals.

UNCERTAINTY

The unpredictability of COVID.

Inability to predict what circumstances will be for next year's planning.

Not being able to plan accordingly for 2021.

TIME

Too much on my plate. I can't fully commit to any one thing.

Time wasters; institutional exercises that add no value.

Not enough hours in the day to meet everyone's needs.

MISCELLANEOUS

Internal politics.

Difficult knowing that our members are suffering, and we can only do so much to help them.

Members with different points of view about COVID safety aspects. Basically mask vs. no mask.

2021 ASSOCIATION

ANNUAL SURVEY RESULTS

OPERATIONS, cont.

We asked: In the past 12 months, what (if any) change(s) has your organization made that improved your job efficiency, productivity, satisfaction, etc.?

COMMON IMPROVEMENTS

- | | | |
|---------------------|------------------------|----------------------------------|
| ⬆ Working remotely | ⬆ Processes/Operations | ⬆ Staffing changes |
| ⬆ Technology | ⬆ Miscellaneous | ⬆ Increased autonomy/flexibility |
| ⬆ Videoconferencing | ⬆ Time management | |

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BUILT-IN MARKETING AUTOMATION & SALES FUNNEL MANAGEMENT

GET A 1-TO-1 DEMO **LIVE GROUP DEMOS**

The banner features a laptop, tablet, and smartphone displaying the GrowthZone software interface. The interface includes a sidebar menu, a 'My Dashboard' section with a pie chart for 'Membership Fee Distribution' and a line chart for 'Total Membership', and a 'Global Organization Overview' section with a table of statistics. A large red arrow points from the 'LIVE GROUP DEMOS' button to the 'BUILT-IN MARKETING AUTOMATION & SALES FUNNEL MANAGEMENT' text.





