



Member Engagement Analysis + Recommendations

STRATEGY & ROADMAP



Strategy Recommendations: Quick Wins

Phase 1: Leverage and evolve current “assets”

- **Salvage TLT.** Partner and leverage expertise, dedication, and motivation.
 - Get to know TLT. Review this research with TLT.
 - Partner on ACMP PNW strategic direction. Harness expertise. Agree on priorities and unleash.
 - Explore together how to improve relationship between TLT and board-at-large. What is role of TLT director? Maybe it's more liaison or advocate to board.
 - Co-facilitate revised charter, purpose, key initiatives, membership.
 - Support their plans for *mentoring, community service, pipeline to schools*.
 - Help chapter stay on top of trends. Tap expertise for thought leadership panels and presentations, ask an expert-asynchronous and/or as an event.

- **Launch new habit of systematically connecting with members.** Keep abreast of members' needs and provide a personal connection.
 - Initiate 1:1 conversations. Start small. Consistency more important. Ask about experience, what they want, invite to upcoming events, ask to volunteer (have role ready or will lose them – even if it's calling other members). (See note section below).
 - Welcome new members: 1)add survey to welcome email. 2)Phone call within 1 month.
 - Pulse survey before each event ends.
 - Annual survey.

- **Provide and encourage asynchronous opportunities for members to self-organize and build community.**
 - Promote ACMP PNW Slack: familiar, proven platform, mobile-friendly. Provide community guidelines, pre-populate with a few channels. Centralize communications.
 - Board: augment, amplify email communications, recruit volunteers, sponsorships, invite to gatherings, get feedback. TLT channel.
 - Members: find other members in proximity, by interests, expertise. Get/give help quickly. Share job postings.
 - Test GeoConnect. Consider Midwest strategy for launching with CCMP study groups or other special interest.

- **Refresh current offerings** (see next page)



Strategy Recommendations: Quick Wins (cont'd)

Phase 1: Refresh or tweak current offerings

- **Quarterly & monthly newsletters:** Personal connection, community-building
 - From a person instead of ACMP PNW or title: e.g., Quarterly Pres message from Larry. Monthly from Laura.
 - Add member spotlight– can start with board or TLT member and ask for solicitations from members – **OR** start an “ask the expert” space and ask for a question from the community and get answer from TLT member (can start with questions that came up from this research). Invite input from members with a board member email.
 - Since Coffee Chats are scheduled for the year, tease upcoming topics in quarterly and monthly communications. Do the same for ChangeConnect if applicable.

- **Event Communications:** Think *Change Communications strategy*– meet where members are. WIIFM.
 - Highlight event content – make logo smaller and replace generic image and copy with speaker image, bio, learning objectives, *what the member will get out of the experience*. Who is it for? Beginner, adv, all? Test new looks, subject line.
 - Re-introduce ChangeConnect. Make personal. From Tara and highlight experience, purpose, WIIFM, personal invite to attend, provide feedback and suggestions.
 - **Future:**
 - Consider renaming Coffee Chat since this is more learning opportunity than chatting.
 - Consider highlighting “advanced” or “foundational” level content.

- **Design into Coffee Chat both learning & connection**
 - Structured connection component at the beginning– 10 minutes tops. e.g., as people are gathering
 - Members rename themselves with an * in front of their names and everyone add where they are from– welcome members and invite them to help your welcome non-members. (track member/nonmember ratio) Chat questions: eg. *What’s on your mind today? Today’s topic is important to me because..* + 2 rounds of “impromptu networking” in pairs with invitation like *I chose to be here today because...*
 - Add 1-2 pulse questions between speaker and Q & A – can be in chat or poll: eg., *Will the info you learned today help you in your work life? What is one action or insight you are planning to take back with you?*
 - **Future:** consider charging non-members a nominal fee for attendance since this is a learning event.



Evolve & Sustain Intentional Community 2022-2024

Phase 2: Iterate. Adapt. Evolve. Continuous learning and improvement.

Evolve Intentional Member Experience

- Define the chapter “Signature Experience.”
- Refine new member orientation.
- Refine advanced practitioner offerings – outreach to those who have left or are vulnerable to leaving.
- Develop & maintain system for 1:1 member outreach, analysis, input to strategy
- Unifying activities to bring emergent and advanced practitioners together: combo events, asynchronous on Slack, GeoConnect.
 - Mentoring opportunities (TLT).
 - Volunteer program – board committees, community-building.
 - Peer-to-peer support & help from experts.
 - Special interest groups: CCMP Study Groups, Book Clubs, etc.
 - Career Path help.
- **MarCom refresh – continue to test.**
- Measure engagement, satisfaction via annual surveys, frequent pulse checks.

Events & Gatherings

- Event refresh as community builds.
 - Evaluate in terms of high-low reach & high-low stickiness (returning participants).
 - Re-evaluate what events can include non-members and when to charge.
- Develop process to solicit and curate member-generated content, case studies - leverage TLT & advanced practitioners.
- Identify & offer more advanced learning topics to engage experienced practitioners: design thinking, neurodivergence, neuroscience, portfolio management, senior leadership.
- Training beyond Prosci: Agile CM
- Test timing of events, alternate morning/afternoon, early coffee chats, later happy hours.
- **Offer both in-person and online gatherings. In-person can be community-driven.**
- Measure: track both registrants and attendees via Wild Apricot; options to make it easier to register for a series of events
- **Future:** consider regional conference – online and in-person components (not mixed).

Ecosystem: Broaden Relationships

- Leverage current TLT plans
 - Universities & colleges
 - Nonprofit community projects
- Identify new sponsorship opportunities with both online community and in-person model.
- Connect and pipeline to BIPOC community & businesses.
- Sister associations for partnerships in programming, events, cross-marketing each other’s events, diversity of thought
 - Start with ODN Oregon and PNW ODN – they are interested and already have a framework in place with other partners.
 - Reach out to others as bandwidth allows. May be able to piggyback on ODN relationships: ICF, SHRM, ADT, PMI, ICF.
- Global ACMP relationship.

Board & Governance (see next slide)



- Current structure minimizes board ability to innovate and adapt quickly to changing environments. Just keeping up.
- Consider distributed leadership with community over traditional “command and control” assoc. leadership system.
- Create the safe space, structure, and intention for member self-organizing and co-created experiences: crowdsource content, in-person events, member connecting/networking.
- Board becomes guide, facilitator, curator, connector to an “ecosystem.” Agile, adaptable, and resilient.
- Work within 2-year tenure of board members. Leverage longer tenure of TLT and committee structure. Sustain momentum with longer-term participation and continuity with volunteer base and community managers.



Strategy Recommendations: Evolve Board for Future

Create intentional community from inside out

2022-2024

Rethink structure & culture of board to mitigate overwhelm, burnout & be more agile

What is practiced here, influences the community experience.

- **Define desired Board Experience + Purpose**
 - What team culture do we want? Values? Expectations? Silos or x-functional? What is not working right now. What is realistic? Do we want a volunteer committee structure? How to model DEI, center equity? How can we support each other? Who should absolutely work together? What should our regular meeting experience and agenda be?
 - How can we create the conditions for psychological safety? Experience becomes more energizing, innovative, sustainable. (4 components of psych safety: board members feel included + belonging, able to give help to each other, have open conversations, safe to learn – can take a risk and fail – key to innovation and creativity.)
- Review governance for any barriers to key programs, leadership. If a concern, how can board positions be added without changing the charter to allow for flexibility, iteration?
- Revise positions to match priorities and desired board experience
 - **Start with small changes aligned with priorities.**
 - Are all positions still relevant?
 - Clarify *realistic* responsibilities, priorities, accountabilities for all board positions.
 - Consider co-leads for positions. Be creative & don't overengineer. eg., mix advanced + emergent or transitioning practitioner, Professional "BFFs," practitioner + committed intern.
 - Establish vision and roadmap for 2024.
- **Quick Win:** Develop initial board orientation – keep it simple: eg., 1:1s with each board member (+ optional gift of *Board Member Orientation* book by Michael E. Batts from orientation under a past president).
 - **Future:** Evolve over time. ACMP Midwest has gold standard



Strategy Recommendations: Evolve Board for Future

Ideas - Future Structure / Role Considerations 2022-2024

Potential additional board roles - start small and iterate, adapt.

Prioritize: Membership and Community-building roles. Recruit committee volunteers for help.

- **Operations Director** to streamline board operations, establish data-driven decision-making (own KPI/measurement, Wild Apricot reporting, Global list management), evolve board orientation, committee structure. Create system for 1:1 member outreach and collecting/analyzing data. Follow Midwest chapter's model (see p.)
- Divide **Membership Director into more positions** to reflect focus on member lifecycle experience: New Member welcoming & onboarding, emerging and advanced practitioner experiences, volunteer program, member outreach, survey data analysis, liaison to TLT for mentorship program, etc.
- **Additional roles for Community-building and support:** Online community director and supporting member-organized groups, creating and supporting regional community chairs for hyperlocal connection – potential sponsorship opportunities.
- **Events + Programs Director(s)**– Consider online programming for entire region as well as programming that can be implemented by local leaders. Curate member-generated content. Partner programming with other chapters, associations.
- **Strategic Partnership** role to establish relationships for diverse programming content and membership pool, pipeline to discipline. Reach out to associations, training opportunities, universities, BIPOC businesses (learn from PNW ODN), PNW businesses – firms with large CM departments, consultancies, etc. (business relationships may already be part of Sponsorship Director role.)



Top Strategy Recommendations: Evolve Board for Future

ACMP Midwest Board Model

10 board members, staggered 2-year terms.

Highly engaged.

Strong volunteer committee structure – pipeline and pool for future board members and for emergencies. Committee for each board position. Participation and engagement of committees are driven by how well board member drives community.

Capture metrics – data drives decisions. KPIs – Wild Apricot: % active members attend, % active members attend 2+, track attendance at events, member activity, number of active members, inactive members, turnover/retention

Transition plan for each board position (developed by Operations Director)

- Position description with critical activities to do and detailed “day in the life”.
- Expect 5 hours/week or 20 hours/month.
- What you should accomplish in 30, 60, 90 days
- Who you should know on the board, committees, who to collaborate with
- Packet of bylaws, history, how we operate, expectations.
- During transition, shadow board member, attend board meeting, meet committee – warm handoff.



Top Strategy Recommendations: Evolve Board for Future

Board positions of other chapters

- Midwest: Director of Operations, Secretary
- ACMP SoCal and Texas: Professional Development, Partnerships, Regional Chairs, Secretary
- DC: Membership and Volunteers, Program and Events, Training, Community of Practice, Secretary. Not a board position but have an *intern program* (6 months) to optimize practices and operations.



Roadmap

