



Creating Optimal Revenue
Opportunities for Your Association

Texas Society of Association Executives
August 2013 Lunch and Learn



ST. EDWARD'S
UNIVERSITY
AUSTIN




BANDING TOGETHER

FOR A CAUSE

PROVEN STRATEGIES
FOR REVENUE AND
AWARENESS GENERATION

RACHEL ARMBRUSTER

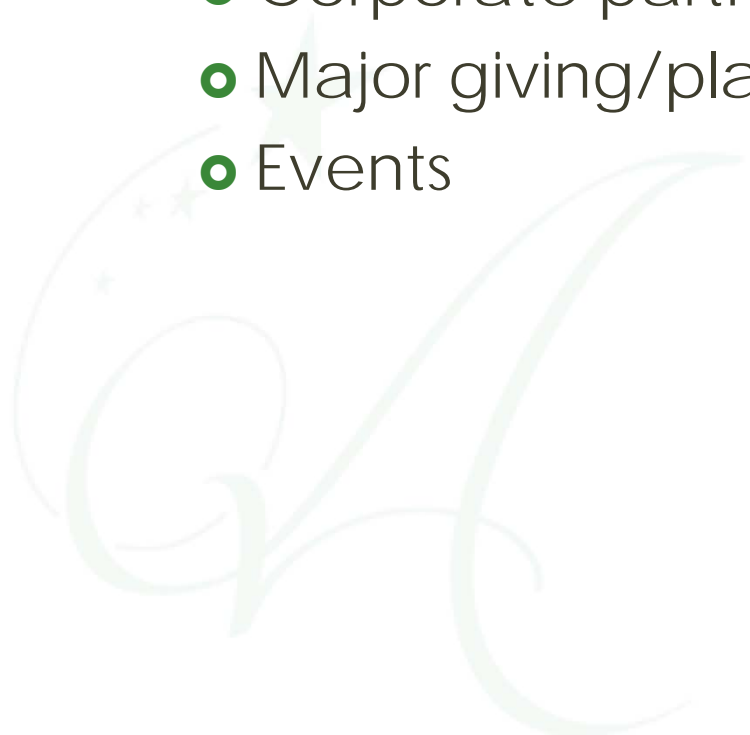


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FUNDRAISING

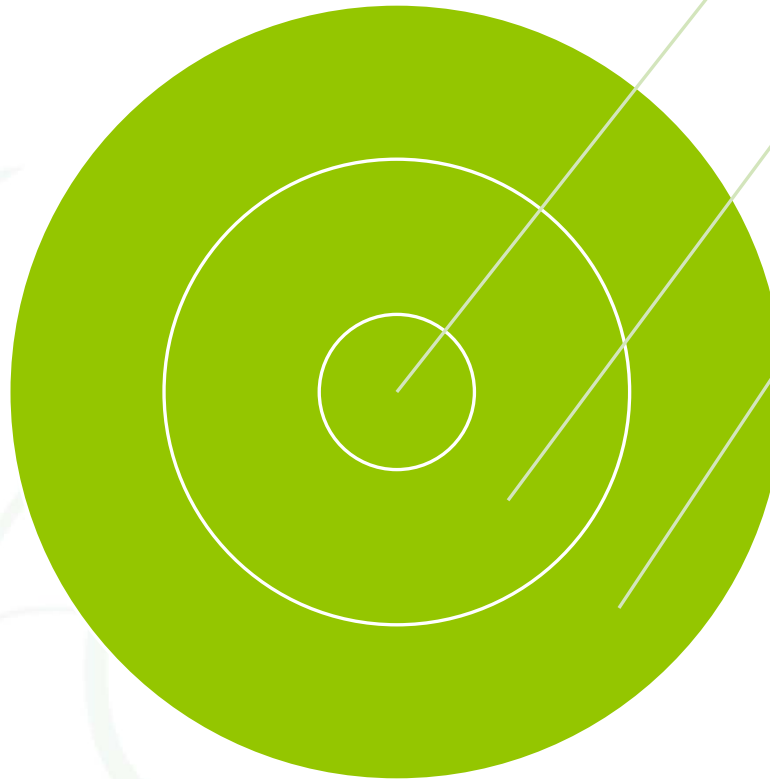
Association Fundraising

- Membership
 - Corporate partners
 - Major giving/planned giving
 - Events
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- A large, faint, light green watermark of the Armbruster logo is visible in the lower-left quadrant of the slide, mirroring the design of the logo in the top right.

A large, faint, light green watermark of the Armbruster logo is visible in the background on the left side of the slide. It includes the cursive name, the stars, and the company name in a smaller font.

Embrace the box!

Audiences



Members

Larger
industry
population

People
impacted
by your
cause
and/or
members

Challenges

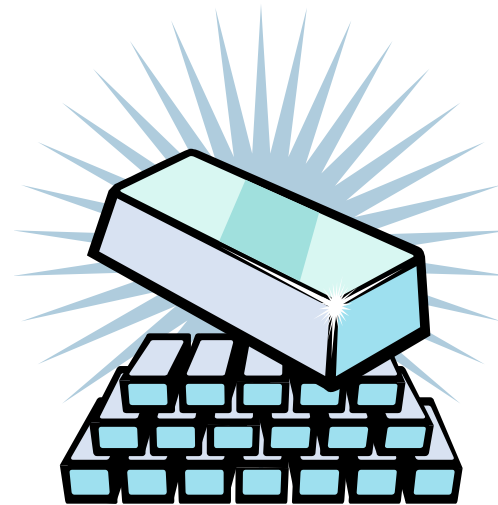
- Current outreach is all member-based
- Standard rates for involvement
- Minimal opportunities to engage as a donor/supporter

Membership

RETENTION



NEW MEMBERS



Retention

- Keep existing members informed
- Shorter communications
- On demand training and resources
- Social media
- Opportunity for networking (live and online)
- Verify value and adjust annually
- Special access
- Know what your members need!

Infrastructure

- Donation/membership process
- Database/CRM
- Simple online registration
- Benefits delivery
- Staffing/customer service
- Rate review
 - Annual membership
 - Corporate membership
 - Sliding scales
 - Multi-year benefits/lifetime memberships

New Members

Larger industry population

- Niche is well-defined
- Direct marketing
- Referral incentives
- Phone
- Personal connections
- Set goals for growth

People Impacted

- Who benefits from your work?
- Could they benefit or find value in your resources or outcomes?
- Are there ways to get involved if you aren't 'in the industry'?



What can the RIGHT corporate partnership do for your organization?



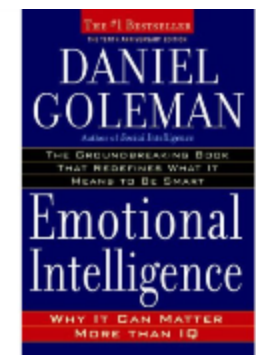
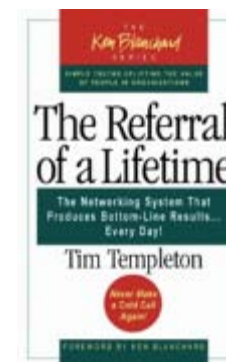
Where are you in the process of corporate relationships?

- Couldn't Ask for More: Have an established program, great group of partners, and just looking for ways to activate and engage more
- Ready and Waiting: Have a program but can't seem to get any takers
- Lucky: Need to develop a program to respond to inquiries
- Hopeful: Starting from Ground Zero with no program, no partners, and in need of next steps

The Basics

- Have strong written and verbal communications
- Understand your Emotional Intelligence
- Be self-aware and constantly seeking improvement
- Learn how to take feedback

READ:



Keys to a Corporate Partnership Program

- Corporate Task Force
- Key messaging
- Engagement menu
- Tools
- Engagement process
- Corporate guidelines

Corporate Task Force

- This is not ONE person's responsibility
- Team should involve people from all departments
- Not a permanent assignment but reconvene as necessary
- Consider internal and external groups
- Clearly state the Task Force's goal(s) before you begin and for recruiting



Key Messaging

- Demonstrate knowledge of your constituents and the organization
- Define potential audiences
- Tell stories – people repeat stories!
- Focus on what THIS audience wants/needs to know
- Distinguish message by speaker also

Engagement Menu

- **Complete** list of opportunities such as:
 - Volunteer program?
 - Joint messaging and awareness campaigns
 - Specific program goals
 - Events
 - Cause marketing
 - Infrastructure

Tools

- Partner filter
- Website
- Policies
- Standard agreements
- Engagement menu
- Marketing
 - Case studies that demonstrate long-term value, relationship focus, engagement, etc.

Engagement Process

- Audience definition
 - Proactive
 - Incoming
 - Existing
- What should they receive and when?
- Establish when you involve others internally
- SLOW DOWN



Major Giving/Planned Giving

- Select group of members or donors may want to engage at a higher level
- Create giving levels with benefits
- Promote gifts
- Develop a case for support
- Interview donors for publications to inspire others
- Launch a major donor cultivation effort – start with just 5 people!
- Be able to clearly articulate how these funds will be used aside from normal dues
- Provide language online for planned giving to make it easy for your members

Next Steps

1. Define your retention plan
2. Examine and enhance giving opportunities
3. Identify where new members will come from and how they will learn about you
4. Create a corporate partnership strategy and develop the necessary collateral
5. Know those you serve
6. Ask for feedback

72 Hour Challenge

- What will you do in the next 72 hours with the information you have learned today?
- Keep/Lose/Change



Contact Me!

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