Solidifying Membership: Targeting Member Recruitment & Retention through Data Science
The Value of Professional Associations

1. Professional support and advocacy matters now more than ever
   a. American Psychological Association (APA) - national
   b. State, Provincial or Territorial Psychological Associations (SPTA’s) - state
      i. licensing regulations
      ii. reimbursement policies
      iii. other critical local practice issues

2. The Connecticut Psychological Association (CPA)
   a. A “Small State” SPTA perspective
   b. Data driven strategies apply broadly
1. Describe CPA’s pre- and post-pandemic onset membership challenges
2. Present the data driven approach informing CPA’s strategy to counter membership decline
3. Discuss CPA’s action steps, outcomes, and broader opportunities for professional organizations to further engage, retain, and grow membership.
Presentation Overview

1. Jessica W. Guite, PhD, CPA Science Representative - “Clarifying CPA’s Benefits & Priorities before the COVID Crisis”

1. Mark Spellmann, PhD, CPA Treasurer - “From Key Findings to Strategy-based Action Steps”

1. Meghan Butler, PsyD, CPA Secretary - “Data Driven Action Steps & Membership Outcomes”

1. Jennifer M. Doran, PhD, CPA President - “Discussion: Conclusions”

1. Anne Klee, PhD, CPA Immediate Past President - “Discussion: Q & A”
Clarifying CPA’s Benefits & Priorities before the COVID Crisis

Jessica W. Guite, PhD, CPA Science Representative

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Psychologist numbers are increasing ...

CPA’s Membership Problems

1. CPA’s membership decline directly decreases the organization’s budget
   a. The numbers of CPA members relative to CT licensed psychologists
      i. 1990’s - 50% membership rate (700 : ~ 1,400)
      ii. 2019 - 10% membership rate (200 : ~ 2000)
   b. Impact on annual dues-based revenue:
      i. 2010 = $100,918
      ii. 2018 = $56,600 - lowest point

2. A Small State SPTA
   a. Primarily runs on volunteer time and effort
   b. Only 3 PT Paid Staff roles: Executive Management Co., Lobbyist, Communications Manager
   c. 2018 - could no longer support a Director of Public Affairs (DPA)
CPA: Membership Numbers on the Decline

1990  50% membership rate for licensed CT Psychologists

2020  10% membership rate for licensed CT Psychologists

Loss of members at 10% per year

Average age of members is 59

Early Career Psychologists (ECPs) join and stay for ~ 1-2 years
Steps to Solidify CPA’s Membership

Membership Committee guiding principles:

1. **Demonstrate value of organization:**
   a. Who is CPA and what services do we provide?
   b. Goal: Increase CPA’s “presence” and personalized contact with state psychologists

2. **Improve quality and quantity of communications:**
   a. How are CPA's services provided? How are they communicated? How accessible is CPA?
   b. Goal: Improve organization infrastructure

3. **Provide desired services to meet the needs of psychologists in the state:**
   a. Who are the psychologists in our state and is CPA meeting their professional needs?
   b. Goal: Collecting data and needs assessment
Clarifying CPA’s Benefits and Priorities

• Winter, 2018 - Fall, 2019 (Pre-COVID)

• CPA Board discussions generated 6 categories of most valued membership benefits:
  1. Advocacy
  2. Networking
  3. Professional Assistance
  4. Educational Opportunities
  5. Marketing Opportunities
  6. Public Service

• Questions CPA most needed to know from members:
  • Type and frequency of media channels used
  • Biggest concerns for the profession
  • Top challenges for practice
Solidifying Membership: Data Needed

1. Discussion of CPA’s benefits and priorities was valuable and a catalyst for action steps
2. Data needed from existing members and all CT licensed psychologists
   a. A survey was created
   b. Organizational “housekeeping” along the way
   c. Survey aims:
      ■ counter membership decline
      ■ recruit new members
      ■ engage respondents in professional advocacy efforts
Survey Design

● Survey launched in September of 2019 (Pre-COVID)
● Standardized questions
  ○ Multiple choice, rank ordering and some open ended responses
● 56 items in total - number of items varied for respondents
  ○ Items tailored to membership status
    ■ CPA member vs. non-member
    ■ Categories: licensed psychologists, early career (ECP), student, and psychologists approaching retirement
● Electronic survey accessible via Weblink or QR code
Survey Participants

- N= 142 responded between October 1 and December 31, 2019
- 66% identified as female
- 84% identified as White (non-Hispanic)

Member categories:

- 64 current licensed members (44%)
- 27 who never joined CPA (20%)
- 24 former members (18%)
- 15 Early Career Psychologists (11%)
- 8 members moving toward retirement (6%)
- 4 student members (3%)

Professional activities included:

- 70% practicing psychotherapy
- 64% doing supervision
- 61% teaching
- 43% involved in research
- 41% providing testing and assessments
- 41% in organizational leadership and administrative roles

From Key Findings to Strategy-based Action Steps

Mark Spellmann, PhD, CPA Treasurer
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Survey Data: Membership

Key Findings:

➢ Members value Classic Professional Organization AND Social Justice
  ○ Strategy & Next Steps: Balance Professional and Social Justice Priorities

➢ Segments of Current Members and Prospects - Sliding Scale Dues
  ○ Strategy & Next Steps:
    ■ Create targeted dues-focused test cells
    ■ Explore CPA service for reduced dues
Key Finding: Members value Classic Professional Organization AND Social Justice

- Legislative Advocacy #1 valued service - 71%
- Insurance Advocacy highly valued by 67%, and Insurance Information highly valued by 62% (before COVID)
- Advocacy for Social Justice highly valued by 56% (before 2020)
- Social Justice work critical to membership decisions of 25%
## Highly valued CPA services and programs

<table>
<thead>
<tr>
<th>CPA Service</th>
<th>% Highly valuing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lobbying at CT Legislature</td>
<td>71%</td>
</tr>
<tr>
<td>Professional assistance with practice issues</td>
<td>68%</td>
</tr>
<tr>
<td>Lobbying for better reimbursement</td>
<td>67%</td>
</tr>
<tr>
<td>Leadership in healthcare reform</td>
<td>64%</td>
</tr>
<tr>
<td>Insurance information</td>
<td>62%</td>
</tr>
<tr>
<td>Healthcare Reform Taskforce</td>
<td>57%</td>
</tr>
<tr>
<td>Advocacy for social justice</td>
<td>56%</td>
</tr>
<tr>
<td>Legal consultation plan</td>
<td>54%</td>
</tr>
<tr>
<td>CE credits at reduced rates</td>
<td>53%</td>
</tr>
<tr>
<td>Ethnic Diversity Task Force (EDT)</td>
<td>51%</td>
</tr>
</tbody>
</table>
Strategy: Balance Professional and Social Justice Priorities

Action steps:

1. Maximized COVID practice rules updates in communications
   - Insurance reimbursement policies
   - Governor’s emergency orders
2. Fielded Experiences with Insurance Companies during COVID survey-very strong response
3. Prioritized CPA’s social justice leadership
   - Speaker series
   - President’s messaging
4. Increased testifying at legislature on key CPA priority bills
   ○ Telehealth
   ○ PsyPACT
   ○ Domestic Violence
5. Featured legislative work in membership and prospect communications
6. Featured legislative work in social media
   ○ Created social media calendar with weekly updates to feed into social media messaging
Key Finding: Segments of Current Members and Prospects Want Sliding Scale Dues

- 60% of prospects said lower dues would affect joining
- 58% of ECPs need reduced dues plan
### Prospects (n=51): Factors driving membership

<table>
<thead>
<tr>
<th>Factors Affecting Prospects Joining</th>
<th>% Endorsing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lower dues</td>
<td>61%</td>
</tr>
<tr>
<td>Knowing more about CPA efforts and accomplishments lobbying the legislature</td>
<td>35%</td>
</tr>
</tbody>
</table>

### ECP’s (n=15): Factors driving membership

<table>
<thead>
<tr>
<th>ECP’s Attitudes toward dues</th>
<th>% Endorsing</th>
</tr>
</thead>
<tbody>
<tr>
<td>I can afford current dues</td>
<td>36%</td>
</tr>
<tr>
<td>I could afford $50 in exchange for CPA service</td>
<td>29%</td>
</tr>
<tr>
<td>I need a plan that takes my student loans and income into account</td>
<td>29%</td>
</tr>
</tbody>
</table>
Strategy: Create targeted test cells - CPA service for reduces dues

Action steps:
1. Testing reduced fees for CPA service in targeted subgroups
   - Recruited mentors
   - Members approaching retirement
   - Members who have provided outstanding service to CPA
2. Follow retention test cells to determine if sliding scale promotes retention
3. Consider expanding sliding scale if successful in test cells
Data Driven Action Steps & Membership Outcomes

Meghan Butler, PsyD, CPA Secretary

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2020 Timeline

January & February

Infrastructure:
- New website development
- Social Media Plan
- Shared Google Calendar

Renewal Season
- Priorities Survey Results
- Legislative Updates

March COVID-19

Communication:
- Professional Inquiries
- Resource Sharing
- Weekly eNews

Legislative Advocacy
- Legislative Advocacy
- Executive Orders Updates

Public Resources
- Professional Support
- ‘How To’ Webinars
- Open Zoom calls
- Meditation
- Free to Members
- All Virtual Meetings

April

Public Resources:
- Crisis Information
- How to Cope
- Community Partnerships

Professional Support
- APA Townhalls
- How to Volunteer

Legislative Advocacy
- Testing codes
- Reimbursement Issues

May Phase 1 Re-Opening

Infrastructure:
- Website Launch
- Number tracking
- Members Only Resources

Student Support
- Reduced fees
- Advocacy
- Leadership Development Program (SOC)

Legislative Advocacy
- Licensure Jurisprudence Exam
- PsyPACT
- Re-Opening Phase I

June

Social Justice
- “Racism Pandemic”
- Public Statement Black Lives Matter
- Allyship Webinar

Early Career
- Leadership Academy
- APAGS collaboration
- Student Open Space

Membership
- Thank You
- Tag Line “Join Now”
- Lapsed Member outreach
- Expired members removed

Public Resources:
- Crisis Information
- How to Cope
- Community Partnerships

Professional Support
- APA Townhalls
- How to Volunteer

Legislative Advocacy
- Testing codes
- Reimbursement Issues

Membership
- PostCard Campaign
- Social Media
## 2020 Timeline

### July & August
- **Professional Inquiries**
  - Professional Affairs Committee
  - Direct impact on Membership
- **Infrastructure**
  - Virtual Convention
  - Social Media planning
- **Social Justice**
  - Speaker Series
  - Advocacy
  - Webinars
- **APA Convention**
  - CPA Presentation Survey Results

### September
- **Membership:**
  - Public Profiles - New Benefit
  - Failed programs
- **Public Support:**
  - Back to School
  - Media Requests
- **Social Justice:**
  - Support Diversity & Inclusion
  - Training in Federal Agencies
- **Legislative Advocacy:**
  - Special Session
  - Extension of TMH

### October & November Phase 2 Re-Opening
- **UnConvention 2020:**
  - Virtual over 3 weeks
  - Access to recordings
  - Marketing & SM
  - Business Meeting & Awards
  - CPA Presentation of Survey Results
- **Senior Career Psychologists**
  - SCP Committee
- **CT Psych Foundation**
  - Revived
  - Giving Tuesday Fundraising

### December
- **Infrastructure**
  - Public Health Committee
  - Calendar Updates 2021
  - Off Cycle Elections
  - Board Planning Survey
- **Legislative Advocacy**
  - Vaccine for healthcare workers
- **Membership**
  - Automated Renewal Reminders
  - Thank You Note Campaign
  - Renewal Letter
<table>
<thead>
<tr>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April &amp; May</th>
<th>June &amp; July</th>
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</thead>
<tbody>
<tr>
<td><strong>Renewal Season</strong></td>
<td><strong>Renewal Season</strong></td>
<td><strong>Communication:</strong> DPH list of email addresses FOIA Request Expanded audience</td>
<td><strong>Social Justice:</strong> Statement on racial violence</td>
<td><strong>Professional Support</strong> Workgroup on Insurance Reimbursement Problems Insurance Survey results</td>
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<tr>
<td><strong>Infrastructure:</strong> Website Glitches Automated Calendar Backend website tutorials Expanding Google Drive</td>
<td><strong>Membership:</strong> Refer a Colleague Discount Program Expanded Social Media</td>
<td><strong>APA’s Practice Leadership Conference</strong></td>
<td><strong>Early Career</strong> Mentorship Program</td>
<td><strong>Social Justice:</strong> Support removal of Indian Mascots in state</td>
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<tr>
<td><strong>Professional Support</strong> Vaccine Roundtable</td>
<td><strong>Legislative Advocacy</strong> TMH &amp; insurance reimbursement issues</td>
<td><strong>Legislative Advocacy</strong> CE Requirements</td>
<td><strong>Communication:</strong> Member benefits Member Spotlight CPA radio segment</td>
<td><strong>Infrastructure:</strong> Fundraising and sponsorship workgroup Expanded revenue sources Merchandise Store Election &amp; awards committee and planning</td>
</tr>
<tr>
<td><strong>Public Statement</strong> Attack on Capitol 1/6</td>
<td><strong>Social Justice:</strong> Antiracism resources AAPI community</td>
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<td><strong>Professional Support</strong> Insurance Provider Experience survey</td>
<td><strong>2021 APA Convention</strong> CPA Representation</td>
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<tr>
<td><strong>Winter Board Retreat</strong> Procedural changes Strategic Planning Brainstorming Groups</td>
<td><strong>Infrastructure:</strong> Draft Operations Manual Email template non-member inquiries</td>
<td><strong>Infrastructure:</strong> Marketing and SM Coordinator Documents and procedures</td>
<td><strong>Legislative Advocacy</strong> Grassroots advocacy TMH Passes in CT!</td>
<td></td>
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</table>
Increased growth:

2018 = 243
2019 = 257
2020 = 274
2021 = 326
<table>
<thead>
<tr>
<th>Membership Category</th>
<th>Fee</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>Licensed Members</td>
<td>$325.00</td>
<td>155</td>
<td>167</td>
<td>159</td>
<td>189</td>
</tr>
<tr>
<td>Licensed Fellows</td>
<td>$325.00</td>
<td>14</td>
<td>14</td>
<td>11</td>
<td>11</td>
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<tr>
<td>Retired</td>
<td>$50.00</td>
<td>19</td>
<td>22</td>
<td>22</td>
<td>19</td>
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<tr>
<td>Students</td>
<td>$20.00</td>
<td>37</td>
<td>30</td>
<td>32</td>
<td>51</td>
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<tr>
<td>(ECP TOTAL)</td>
<td></td>
<td>16</td>
<td>18</td>
<td>34</td>
<td>51</td>
</tr>
<tr>
<td>ECP Fellows</td>
<td>$0.00</td>
<td></td>
<td></td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>PostDoc</td>
<td>$35.00</td>
<td></td>
<td></td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Associate Doctoral (not licensed)</td>
<td>$325.00</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Association Masters (not licensed)</td>
<td>$125.00</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Association (Friend) of CPA</td>
<td>$125.00</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Academic</td>
<td>$125.00</td>
<td>0</td>
<td>4</td>
<td>4</td>
<td>2</td>
</tr>
</tbody>
</table>
| TOTAL MEMBERS                             |       | 243  | 257  | 274  | 326  

**2021 Members**

- Licensed Members: 189 (31.5%)
- Licensed Fellows: 11 (1.9%)
- Retired: 19 (3.4%)
- Students: 51 (8.3%)
- ECP Fellows: 9 (1.4%)
- PostDoc: 2 (0.3%)
- Associate Doctoral: 1 (0.2%)
- Association Masters: 4 (0.6%)
- Academic: 2 (0.3%)
- TOTAL MEMBERS: 326 (100%)

- Licensed Members
- Students
- ECPs
- Retired
- Post Doc
- Academic
- Friend of CPA
- Associate Masters
- Associate Doctoral
- Licensed Fellows
- Academic
Discussion: Conclusions
Lessons Learned

Bidirectional Avenues for Communication ⇒ Important

Responsiveness to Questions & Concerns ⇒ Important

Communicating Benefits & Value ⇒ Important

Social Justice Orientation & Work ⇒ Important

Data-Based Strategic Planning ⇒ Important
TALK TO MEMBERS AND NON-MEMBERS

TAKE A SCIENTIFIC APPROACH TO UNDERSTANDING AND SOLVING MEMBERSHIP PROBLEMS
• Need to communicate what an SPTA is (and is not!) and concretely show the benefits of membership
• Need to increase education about what SPTAs do and how they operate and support themselves (dues dependent)
• If you give it all away for free, there is no incentive to pay/join
• Membership marketing infused throughout every aspect of the work and communication
Pro-Membership Messaging

“Thank you for your email. Please note that we are receiving a high volume of email inquiries at this time and will be responding to all member inquiries first.”

“We are happy to provide that advice/information/consultation to all CPA members, and we would love to have you join us.” <link to join>

“Thank you for your CPA membership. Our operations are supported by your membership and we cannot do the important work we do without you.”
Responding to Current Needs & Concerns

1. We hear you
2. We are working on it
3. Here is how
4. For more information and updates….
Highlighting Social Justice Initiatives and Efforts

Member Benefit

Social Justice

1. COMMUNITY RESOURCE
CPA affirms its dedication to using our skills as psychologists to advance equity, diversity, and inclusion initiatives and address the racism pandemic to support our members and the communities we serve as a resource to address social justice challenges.

2. ETHNIC DIVERSITY TASK FORCE
Our Ethnic Diversity Task Force includes a group of diverse professionals committed to the mentorship of students of color, promoting mental health initiatives in communities of color, and advancing culturally competent practices within our profession.

3. SOCIAL JUSTICE SERIES SEMINARS
The SJSS are free, monthly events open to colleagues and the public with presentations from diverse speakers on the interconnection between diversity, social justice, and mental health.

YOUR CPA MEMBERSHIP GIVES YOU THESE BENEFITS AND MORE!
TARGETED MARKETING PLAN

Need to focus on students, ECPs and Senior Career Psychologists

Approach, efforts, incentives and communication tailored to each group

Data-based approach to each group’s priorities and preferences
Conclusions

Data → Inform Plans and Priorities

Data → Tracking of Programs and Outcomes

Targeted Marketing Plan

Membership Engagement & Outreach as #1 Priority
LOOKING FORWARD...

Continuing to prioritize EDI and Social Justice initiatives

Continuing to communicate about legislative issues and action - Voter Voice Platform

Continuing to prioritize data-based planning & action

Continuing to increase social media presence and avenues for bidirectional communication
Discussion: Q & A

Anne Klee, PhD, CPA Immediate Past President
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Dr. Guite, you presented on the process of putting together the data survey, what did you learn on this journey? What were some surprises along the way?
Dr. Spellmann, among the data you presented, you shared that many ECPS and non-member psychologists think CPA’s dues are too expensive. The data also explored other dues options. What are some models you’d like CPA to explore?
Dr. Butler, you shared many steps and actions CPA has taken over the past few years to increase membership. What are some of your insights gained?
Dr. Doran, you distilled many important lessons learned from CPA’s Priorities Survey and membership committee efforts. What has surprised you most in your first year as CPA president?
THANK YOU!

For a copy of this presentation, please email jessica.guite@uconn.edu

For more information on CPA, please visit www.connpsych.org