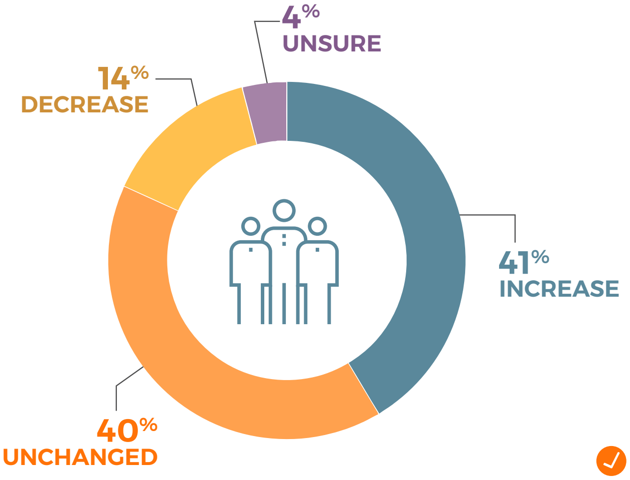
# WASHINGTON SELF-INSURERS ASSOCIATION

*Membership Recruitment & Retention Assessment*

# INTRODUCTION

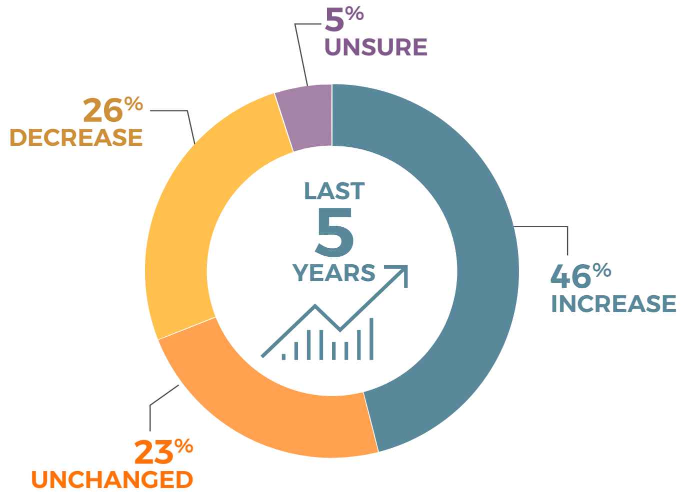
Throughout the years, the Washington Self-Insurers Association (WSIA) has made several efforts to improve services and increase membership. However, despite WSIA's best efforts and a rebrand in 2013, the Association has lost 10-15 percent of its membership each year within the last few years. WSIA is not unique in this experience. In 2017, GrowthZone conducted a survey of 1,000 associations within numerous industries across the nation, which demonstrated the following:

## OVERALL MEMBERSHIP GROWTH:




*54% of associations report a decrease or no growth in membership.*

## MEMBERSHIP GROWTH:
LAST 5 YEARS



# TOP 10 CHALLENGES HOLDING ASSOCIATIONS BACK:

WE ASKED, "WHAT'S THE #1 THING HOLDING YOUR ASSOCIATION BACK?"

## WHAT RESPONDENTS SAID:

1. LACK OF FUNDING
2. RESISTANCE TO CHANGE/COMPLACENCY
3. NOT ENOUGH STAFF
4. OUTDATED TECHNOLOGY
5. LEADERSHIP
6. BOARD OF DIRECTORS
7. AGING MEMBERS
8. PARTICIPATION
9. MEMBER ENGAGEMENT
10. INDUSTRY CHANGE

## WHAT MEMBERS SAID:

1. BUDGET CUTS
2. LACK OF VALUE/LITTLE TO NO RETURN ON INVESTMENT
3. NEVER HAD TIME TO PARTICIPATE

# INTRODUCTION CONTINUED

**"DUES ARE VERY REASONABLE."**

Similar to the associations surveyed, WSIA has had difficulty recruiting new members. Recognizing this trend threatens the stability of WSIA, the Association commissioned a membership recruitment and retention assessment with Smith Moore & Associates and ACS Quantum Strategies (SMA/ACS).

The input SMA/ACS received throughout the assessment process spotlighted that WSIA is highly regarded by members and those external stakeholders participating in this process. Members interviewed also commented positively on WSIA's leadership in initiating this assessment as a means to improve the Association. They overwhelmingly confirmed that WSIA needs to continuously ask members and the community, at large, what they want and/or need to remain engaged to ensure WSIA is providing relevant answers to the problems or situations current and prospective members are experiencing.

There's no silver bullet for membership engagement strategies. Recruitment, retention, reattraction and engagement are all spokes of the membership wheel. The wheel can only turn if an association has adequate resources, including funding, staff, technology and a solid plan.

The following summarizes the assessment process, top-of-line themes and recommendations. The recommendations are intended to guide WSIA's leadership in formulating a membership engagement plan. WSIA leaders will need to evaluate the recommendations and identify those elements to include in the plan based on priorities and available resources.

**"WSIA DUES ARE DEFINITELY WORTH THE VALUE OF BEING A MEMBER. "**

# ASSESSMENT METHODOLOGY

In support of the above goals, SMA/ACS conducted secondary and qualitative research, including a review of WSIA's marketing/membership/communication materials, conversations with the WSIA Executive Director and staff, a focus group with key WSIA Board members and telephone interviews with a wide cross-section of WSIA members. The purpose of the marketing assessment was to identify perceptions relative to the perceived value and benefits of WSIA as well as how best to ensure continued membership engagement, particularly with young leaders.

**"WSIA HAS A SMALL STAFF, BUT WHAT KRIS PRODUCES IS REALLY, REALLY GOOD."**

Based on several phone calls with the WSIA team and review of WSIA materials, SMA/ACS developed questions to conduct a focus group with WSIA Board members. Four out of seven invited WSIA Board members attended a two-hour focus group on March 2, 2018. The discussion focused on member services, benefits and recruitment. Board members were asked approximately 12 questions, including describing the purpose of WSIA, articulating the value received from being a WSIA member, if the dues reflect the value received, if additional benefits should be provided, what innovation for WSIA looks like, where new leaders for WSIA will emerge from and ideas to grow membership engagement and loyalty.

The information garnered from the focus group informed the development of a questionnaire for the confidential telephone interviews. Whenever possible, SMA/ACS tested the information retrieved against assumptions obtained from the focus group. Twenty-five WSIA member stakeholders were contacted to participate in the confidential interviews. Stakeholders represented class-1 employers with up to 500 employees; class-2 employers with up to 1,000 employees; class-3 employers with up to 5,000 employees; class-4 employers with up to 10,000 employees; and class-5 employers with more than 10,000 employees as well as associate members, third-party administrators, past leaders and a few additional non-member stakeholders. Eighteen of the 25 stakeholders contacted participated in the interviews, which were conducted over a one-month timeframe.

**"LEGISLATIVE NEWSLETTERS AND KRIS'S MESSAGES ARE GOOD EXAMPLES OF GREAT COMMUNICATION."**

**Members were asked approximately 12 questions, including but not limited to:**

- Describe the purpose of WSIA.
- Describe the value received from WSIA and if the dues reflect that value.
- What can WSIA do for the member that the member can't do for him/herself.
- From where the new WSIA leaders of tomorrow will emerge and ideas on engaging new leaders.
- The value of regional meetings and how to increase attendance.
- Where members get most of their information.
- Other possible benefits WSIA could provide.
- How to grow membership engagement and loyalty.
- What innovation looks like for WSIA and to react to two possible ideas, specifically:
    - Innovation looks like working with the Department of Labor to require all employers who certify as self-insured must be a member of WSIA.
    - Innovation looks like WSIA opening up membership to all stakeholders in the workers' compensation industry to become a one-stop shop for all of workers' compensation issues, not just those associated with being self-insured.

# TOP-OF-LINE THEMES

The following summarizes the top-line themes retrieved from the interviews and focus group as well as recommendations for WSIA to consider.

## FOCUS GROUP

- Often, there is more than one employee of a self-insured employer who should be contacted by WSIA and who responds to different messages. It is unclear if WSIA is communicating with various levels within an employer organization.
- WSIA needs to determine the real audience and what departments are responsible for risk management. This varies for organizations – risk management, finance, accounting, etc.
- WSIA's contact information/database needs to be addressed – old data.
- Need to communicate the value of being a member of WSIA – very much tied to advocacy.
- Training is much more visible to members; however, legislative advocacy creates the biggest impact.
- Serving on the WSIA Board gives access to excellent information.
- Being on the Board is motivation to stay engaged in WSIA.

**"DON'T UNDERSTAND HOW A SELF-INSURED EMPLOYER IN WASHINGTON CAN HAVE AN OPTIMUM PROGRAM WITHOUT ACCESSING THE RESOURCES OFFERED BY WSIA."**

- WSIA needs to develop short, timely and to the point messages to be easily understood in a three- to five-minute scan.
- Innovation could be to enact a law requiring mandatory membership in WSIA for all employers with a self-insurance certificate.
- Innovation could be for WSIA to become a one-stop-shop for all things workers' compensation.

## CONFIDENTIAL TELEPHONE INTERVIEWS

- The majority of comments were extremely positive related to the Executive Director's leadership.
- The perception of dues to value is excellent; a "screaming deal."
- WSIA is viewed as the primary advocate for self-insured workers' compensation employers and a strong, well-respected voice at the Capitol.
- Overall trainings, particularly for continuing education units (CEUs), are valued but could be improved.
- Two conferences in both parts of state are valuable but need improvement.
- The conference appears to be becoming vendor heavy.
- The annual conference format needs to change if newer generations are to become interested.
- Organizations that elect to contract with TPAs should not abdicate their responsibility to champion self-insured employers.
- Members are concerned about who will step up to the plate and lead WSIA in the future, and "if we lose Kris, we are in trouble."
- A perception exists that the "keys to WSIA" are held by a select few members, and until they transition out, things will remain the same.
- A lack of understanding exists on what is required to lead/serve on WSIA's Board and committees.
- The Executive Director's weekly communications are extremely valued and seen as critical communications tool; however, they are seen as "Kris's email" not WSIA's email.
- There is a perception that WSIA is a "party" organization, which won't attract the bigger corporate members – a perception of old boys'/girls' network.
- Digital communications/platforms need to reign.
- Innovation was difficult to determine; however, of two ideas advanced from the focus group, broadening WSIA to include all aspects of workers compensation garnered support.
- Networking is still valued.
- Trainings are redundant and predictable.

# RECOMMENDATIONS

### Membership/Marketing/Communications

- Messages needed to be targeted for different membership groups/audiences.
- Get WSIA connected to c-suite employees.
- Ensure messaging regularly highlights advocacy successes and value to members.
- Consider promoting the notion of access to critical information, in particular advocacy information, as a benefit of joining the Board or becoming a member.
- Focus on the conversion year (first-year members) to engage members and increase probability of retention. When new members join, meet with key individuals within the organization quarterly for the first year to keep a focus on the face of WSIA.
- Consider hiring staff dedicated to marketing/ membership
- More proactively communicate about and undo or address state regulatory decisions/burdens before they are finalized. Increase dues – create a dues value statement.
- Brand materials as WSIA rather than attached to a single individual.

### Education and Training

- Consider providing soft skills trainings such as customer service, being advocates for claims, verbal and written skills, cultural and generational issues, cooperative approaches to return to work and building relationships with clients.
- Consider offering leadership training for employees of self-insured employers, such as a program manager learning lab, to attract young leaders to WSIA.
- Provide trainings online and digitally and archive, communicate about and enhance the professionalism of them.
- Continue putting on two conferences in two parts of state but upgrade content and speakers.
- Vet speakers to ensure quality.
- Revisit goals of conferences and webinars. If CEUs are the key driver, webinars may be more cost effective.

**"CHANGE THINGS UP. MAKE SPACE FOR NEW LEADERS TO SHINE. SPOTLIGHT THEM."**

## Governance and Engagement

- Adopt governance strategies that encourage new leadership turnover (board members, committee members, etc.) of WSIA. Term limits, succession planning and mentoring of potential leaders should be included in those strategies to address concerns of a static board.
- From the beginning, clearly outline volunteer job descriptions, time commitments and expectations to serve as WSIA leaders.
- Develop a taskforce comprised of younger leaders as an advisory to the Board on engaging young members.
- Give young leaders more visible leadership roles at WSIA conferences to boost engagement. Allow them to introduce programs.
- Provide mechanisms for members to interact such as publishing contact information, creating listservs, etc.

**"SELF-INSURED EMPLOYERS WHO USE TPAS ARE DIVORCED FROM THE PROCESS OF BELONGING TO WSIA – DON'T UNDERSTAND THEIR ROLE IN THE SELF-INSURED COMMUNITY."**

## Advocacy

- Ensure the balance of self-insured employers' voices vs. TPAs.
- Work on big policy issue such as the wage calculation in Washington, which is too complex.
- Elevate the Executive Director's role as a high-level advocate and the face of WSIA, and delegate the responsibility for member services and trainings to existing or new staff. Executive Director should focus on building relationships with big self-insured employers.

**"SELF-INSURED EMPLOYERS NEED TO RECOGNIZE THE VALUE THAT THEY RECEIVE FROM HAVING EMPLOYEES AS PART OF THE WSIA LEADERSHIP."**

### Technology and Data-Driven

- Move toward more data-driven decision making to get a stronger pulse on members. Conduct a professional membership survey every three years with existing and potential members and strengthen the database.
- Strengthen digital platforms for increased use of social media.

### Miscellaneous

- As a step toward sustaining and growing WSIA, further test the idea of opening up membership to all stakeholders in the workers' compensation industry to become a one-stop shop for all workers' compensation issues, not just those associated with being self -insured.
- Explore partnerships as a way to expand capacity and get additional revenue. WSIA could endorse or market partnership programs, such as trainings, and receive a percentage of revenue, which would relieve WSIA of needing to internally handle everything, given its small staff.
- Consider asking each member to bring a person from his/her organization to WSIA conferences to expose them to WSIA's value and gain succession with the organization.

**"GET OUT THERE WITH THE SELF-INSURED EMPLOYERS – GENERATE AND DEVELOP RELATIONSHIPS. IF YOU AREN'T VISITING WITH, TALKING TO OR GOING IN TO HELP THE SELF-INSURED EMPLOYERS AND SHOWING YOUR VALUE, WSIA WON'T GROW."**

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