

The Membership Management Report

THE MONTHLY IDEA SOURCE
FOR THOSE WHO RECRUIT,
MANAGE AND SERVE MEMBERS

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BEST-PRACTICE SALES TACTICS

Strengthen Your Negotiation Skills

By Kim Pawlak

The two skills most people ignore when it comes to negotiating are listening and asking good questions, says Shakira M. Brown, communication strategist and professional speaker at SMB Strategic Media LLC (Hamilton, NJ).

“When you listen more, you’ll find that people will reveal far more information than they expect, and you can use that information to negotiate your position,” she says.

“Asking good questions is another way to get information from the other side that they may not have intended to provide. This is not trickery. It is just creating the space for information to flow to help you negotiate your side.”

Brown says the best type of questions to ask are open-ended questions that can’t be answered with simple yes or no responses. While the questions you ask will be situational, she shares this example of a straightforward question: “Is there anything down the pike I need to know about that I might be interested in right now?” They may not answer, she says, but if they do, it could be something like, “You know what, actually, coming up, blank, blank blank will be available, and while I can’t give that to you now,

when it’s available, I can make sure that you’re first in line.”

That’s why listening is so important, says

Brown: “There might be something that you’d like to add into your package that is of value to you that they didn’t know would be of value to you. It could be something that you accept in lieu of something else to move the negotiation forward. It could be something that you could benefit from.

It also could be something that the other side could benefit from.” Maybe it’s that something you could do for them that will get the deal done, she says. That one thing then becomes part of the negotiation.

“If you don’t listen, you’ll never find out anything,” she says. “If you’re constantly focused in on just your position, you’ll never get the information that provides an opportunity for you to create a win-win deal for both sides. And a win-win typically will move the negotiation forward.” But again, if you don’t ask questions to get that type of information out, it most likely won’t be volunteered. ♦

“If you’re constantly focused in on just your position, you’ll never get the information that provides an opportunity for you to create a win-win deal for both sides.”
— Shakira Brown

Source: Shakira M. Brown, Communication Strategist and Professional Speaker, SMB Strategic Media LLC, Hamilton, NJ. Phone (888) 436-0033, ext. 2. Email: sbrown@shakirabrown.com. Website: <https://www.shakirabrown.com/>

MEETINGS MANAGEMENT

Conduct Post-Meeting Evaluations

To improve future meetings, it helps to evaluate those you have just completed. In your ongoing effort to help member-related meetings run more effectively and efficiently, take time to complete the following steps at their conclusions:

- Set the date, time and location of your next needed meeting.
- Ask meeting participants for feedback.
- Provide attendees with action-oriented minutes within 24 hours — who is expected to do what by when.
- Visit privately with the individual who deviates from the printed agenda.
- Review the agenda to eliminate topics (for future meetings) that appear unnecessary. ♦

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MEMBERSHIP DUES OPTIONS

Invite Members To 'Pay It Forward'

The year 2020 was difficult for many businesses, and the journey to recovery continues to be an uphill battle. Organizations can aid those members who've had to tighten their belts by inviting others to help share the burden.

In mid-July 2021, the Greensboro Chamber of Commerce (Greensboro, NC), implemented its Pay It Forward program, which provides a year of membership dues to member businesses still facing hardship from the pandemic.

Member Engagement Retention Specialist Stephanie Phillips says she was inspired by a similar program she saw being done by the Iowa City Area Business Partnership.

"I came across their program online and reached out to representative Erin Hoard for some successes and challenges that they've had with their program," she explains.

For Greensboro's program, members can choose to donate at several different levels: Leader at \$1,350; Ally at \$900; Advocate at \$450; or another amount. Each level not only covers the annual dues for three to one member(s) but also offers benefits like a special logo, a social media thank-you and recognition in the e-newsletter, at monthly chamber events and in the chamber's annual report.

Phillips says the most popular donation options have been the Leader and Ally levels. And, within five months, they've had five members donate to the fund, covering the annual dues for six member businesses.

The program is promoted through the chamber's social media channels, at in-person and virtual events and on investment renewal letters that go out to all members each month.

"In addition, we mention the fund while talking with our members in individual meetings if they are looking for a way to give back to the small business community," says Phillips. "We also promoted the program on Giving Tuesday on November 30." ♦

Source: Stephanie Phillips, Member Engagement Retention Specialist, Greensboro Chamber of Commerce, Greensboro, NC. Phone (336) 387-8331. Email: sphillips@greensboro.org. Website: <https://greensboro.org/>

CONFERENCE MANAGEMENT STRATEGY

Collect Registration Payments On-Site

Need an efficient way to collect on-site conference registrations from attendees who don't prepay? Kim Robinson, president of FrontlineCo (Springfield, IL), says a low-tech method that has worked for their association clients has been to flag the attendee's registration envelope so, when they show up to pick up their packet on-site, they are directed to a separate line (such as an on-site registration line) to pay the balance before they are handed their badge and materials. ♦

Source: Kim Robinson, CAE, President, FrontlineCo, Springfield, IL. Phone (217) 528-3434. Email: kim@frontlineco.com. Website: <https://frontlineco.com>

Time to Turn Your Renewal Process Upside Down?

Are you wasting time and money trying to connect with disengaged members who have no intention of renewing? The first few months of membership play a significant role in an individual's choice to continue the relationship with their association long term.

"Hundreds of members told me that by the time the renewal process starts, they've already decided whether to renew or not," says Amanda Kaiser, member engagement specialist for Kaiser Insights, LLC. "One of the most powerful renewal tactics is a strong onboarding program." Without that strong foundation, members may feel there's less incentive to continue their journey with the association. Here Kaiser offers advice on boosting engagement from day 1:

What can any association do to reframe this way of thinking about renewals?

"Many member organizations are driven by their own internal processes and calendar, which may not augment their member's journey. So talk to members and find out what their goals are and figure out how to help them during each of their member journey milestones."

How can these organizations turn their renewal process "upside down"?

"The member journey tends to be dotted with milestones, points at which members either engage or disengage. Determine what the milestones are for your members and implement strategies to nudge members toward engagement.

"Popular member journey milestones are:

- The first three days to three weeks of membership.
- Attending their first in-person or virtual conference.
- Attending their first in-person or virtual chapter meeting.
- Speaking, writing or being interviewed for the first time.
- Engaging in advocacy work for the first time.
- Navigating the certification process.
- Accepting their first volunteer role.

"These are just some examples of common member journey milestones. It's up to you to determine which key milestones are part of your members' journeys."

What benefits can an association expect to see as a result of improving their onboarding program?

"The associations that focus on onboarding new members report they gain more access to information about member needs, see an increase in renewals and notice more participation, collaboration and contribution from members. In short, new member onboarding programs can create energy in the membership."

What are some common obstacles member organizations face regarding renewals, and how can these be seen as opportunities instead?

"Staff can get frustrated when they are doing all the right things with their renewal program and are still not seeing results. Putting more focus on a new member onboarding program can drastically improve results."

Do you have an anecdote that demonstrates how rethinking the renewal process brought an organization success?

"One engineering association noticed that the renewal rate was weakest among new members. The staff spent years refining and tweaking their renewal process but saw very little change for all their efforts. Recently they decided to focus on their new member experience; they:

1. Created a new member email campaign.
2. Appointed chat moderators for virtual meetings whose duties included warmly welcoming new members.
3. Doubled down on new member recruitment into subject-focused and geographic chapters so new members could get involved quickly. While these programs have only recently started, association leaders feel participation has jumped."

For more tips on how to improve new member onboarding plans check out [The New Member Engagement Study Report](#). ♦

Source: Amanda Kaiser, Member Engagement Specialist, Kaiser Insights, LLC. Email: akaiser@SmoothThePath.net. Website: www.SmoothThePath.net

PUBLICATION TIP

Use House Ads in Content Emergencies

Did a Q&A with a chapter leader fall out of the quarterly magazine at the last minute? Did a member pull their campaign just hours before it was time to upload the annual chamber guide? Take steps to prepare in the instance that a sizable chunk of white space has you up against a print deadline. Dan Shortridge, a former newspaper editor and marketing consultant, mitigates this risk by stockpiling content that can be used anywhere, any-

time. "Have some evergreen house ads of many different sizes on hand that you can drop onto a page to fill space in an emergency," he suggests. "Don't wait until a piece falls through." ♦

Source: Dan Shortridge, Former Newspaper Editor and Marketing Consultant, Dover, DE. Email: danshortridge@gmail.com. Website: <https://www.linkedin.com/in/danshortridge/>

MEMBERSHIP BENEFITS

Hold Weekly Online Discussions

As a way to facilitate connections among its members, The Society for Personality and Social Psychology (SPSP; Washington, DC) developed a program called Free-Form Fridays in October 2020 that allows members to host weekly Zoom small-group discussions on a variety of topics.

Two to three sessions are held each Friday, with new topics announced at the start of each month. Most sessions are limited to a maximum of 15 attendees and are hosted by members with the purpose of sharing career advice, pondering big-picture questions together, meeting members with a similar background, brainstorming sessions and more. Members apply to host a session by submitting a meeting name, description and preferred dates and times at least two weeks before the start of the month. Select sessions are recorded and made available on the SPSP website.

“It has been a great resource for our members,” says Jan Kang, senior community and resource manager. The number of session attendees range from 5 to 50, with about 100 members participating each month. They have received lots of positive feedback from participants, she says, including, “Free-Form Fridays are a great opportunity to connect in a more casual setting

with peers and colleagues across the map who share similar research interests.”

Session hosts are recruited through a combination of general promotion and direct recruitment, says Kang: “I try to ask a variety of people each month if they would be interested in hosting by reaching out to our member communities, affinity groups or others active within the organization.”

Hosts decide how they want to lead their sessions, with some preparing questions ahead of time or presoliciting questions from registrants and some preparing slides while others hold open discussions.

Members are encouraged to participate in sessions via email, Twitter or the SPSP newsletter, with some hosts promoting it to their external networks as well.

While it is intended as a member benefit, recruitment and retention hasn't been the primary focus, says Kang: “However, the more opportunities we can provide to help members feel connected to each other, the more likely they are to be active and to stay members in SPSP.” ♦

Source: Jan Kang, Senior Community and Resource Manager, Society for Personality and Social Psychology, Washington, DC. Phone (202) 869-3248. Email: jkang@spsp.org. Website: <https://spsp.org>

MEMBER ORIENTATION STRATEGIES

Create Brief Member Resource Tutorial Videos

As a way to better engage its new members, especially those joining as part of their recently created organizational membership dues category, the Association of Legal Administrators (Chicago, IL) decided to create a series of short tutorial videos to enhance their member orientation efforts.

Called “ALA in a Minute,” the videos focus on membership basics — how to log in, how to access their profile — as well as answering the questions most frequently asked by members, including how to join a chapter and how to locate ALA publications, says Teena T. Austin, senior manager of member services.

Research conducted with some of their new organizational members found that more than 60 percent said they would find video helpful in helping them get more engaged, she says. Purchasing a new learning management system and hiring a learning designer highly skilled in instructional video production in early 2020 made it possible for them to move ahead with creating these videos.

They posted their first video in spring 2021, have since added five more and plan to add new videos to the library periodically. “We had created a plan and had an outline and

some scripts ready for a couple of years, but my personal efforts to develop videos using Camtasia didn't meet my expectations,” says Austin. “I recommend having the right person to do the work.” They also draw on the expertise of various staff members when creating and developing the scripts, and their graphic designer contributes to the professional look and feel of the videos by producing some of the animations.

One of the reasons members cited for not renewing was they never took the time to learn how to utilize the membership, says Austin: “It's just one more way for us to try to engage our members and break down our content into easily digestible segments that they can consume.” In addition to including the videos on the ALA website, they have also been incorporated into their new member onboarding program, which occurs over several weeks during the first year of membership. ♦

Source: Teena T. Austin, Senior Manager, Member Services, Association of Legal Administrators, Chicago, IL. Phone (847) 267-1382. Email: taustin@alanet.org. Website: <https://www.alanet.org>

STRENGTHEN MEMBER LOYALTY

Provide Members With a Virtual Plaque

A virtual plaque gives member organizations valuable online exposure. If you haven't incorporated this offering into your member benefits, now is the time.

La Mesa Chamber of Commerce (La Mesa, CA) has offered its member businesses a virtual plaque since 2014.

"A virtual plaque is a way for our members to further brand their business right on their website and other digital platforms," explains President and CEO Mary England. "Membership in a chamber of commerce has come to signify corporate citizenship and excellence, and a website is a storefront to the consumer and the world."

The chamber's virtual plaque is created in-house. It is

a digital image that mirrors the physical plaque chamber members display at their business except it's placed on the member's website and linked back to the chamber or to the member's personal business page in the chamber's directory.

Members are encouraged to use the virtual plaque when they join the chamber, which is also marketed on the chamber's website and in its weekly member email blasts. ♦

Source: Mary England, President and CEO, La Mesa Chamber of Commerce, La Mesa, CA. Phone (619) 465-3851. Email: maryengland@lamesachamber.com. Website: www.lamesachamber.com

CAREER DECISION CROSSROADS

Is It Time to Move on Professionally?

An important facet of your career advancement includes recognizing when it's in your best interest (and perhaps your employer's) to move on to a new position. And sometimes recognizing when to move on is much more difficult than the actual process of seeking a new position.

If you are experiencing a number of the following characteristics, it may be time to begin seeking employment elsewhere:

- You find yourself continually questioning decisions of top management.
- Your passion for the association's mission has been shaken or diminished.

- Your attitude has become more negative than usual.
- You are unable to tackle responsibilities with enthusiasm.
- You sense you are not part of team efforts to further your association.
- You are experiencing increased absenteeism and/or dread of going to work.
- You tend to be increasingly critical of others.

A word of caution: Seeking a new position may not always be the answer in resolving job difficulties. Sometimes we need to seek change from within by examining our own attitudes and work habits. ♦

MEMBER RELATIONS

Create Effective Procedures For Inbound Phone Calls

Other than routing inbound phone calls to the appropriate staff person, what procedures do you have in place to make the most of each incoming telephone call? Never miss an opportunity to fully serve existing members and establish relationships with probable members.

Here are examples of procedures that should be addressed:

- Do you extend an invitation for the caller to visit your facility?
- Should you confirm contact information: address, phone, email address?
- Are you using the call as a way to "sell" something — memberships, gift items, etc.?
- Is the receptionist able to easily access the individual's profile in your database to determine key background information (e.g., member level, key interests)?
- Is the receptionist prepared to ask key questions that may provide useful information that may not be in the member's file?
- Do you use the opportunity to tell the caller about an upcoming event or other timely organizational news?
- Is all staff aware of and comfortable with implementing these phone-answering procedures? ♦

Monetize Your Webinars With an All-Access Package

Looking for a way to use your webinars and other educational content to drive non-dues revenue? ACA International (Minneapolis, MN) packaged its live and on-demand webinars, trainings and other educational content into one all-access package members can purchase for a flat annual fee.

ACA's All-Access Training Zone includes CORE Curriculum courses that present the fundamental principles of their industry, and Hot Topics that provide information from experts on the latest issues, rules and regulations that affect members' businesses. Annual fees for the Training Zone range from \$999 to \$1,999 depending on the member's number of employees.

"For the first couple of years, our goal for the program was to build value by loading it with content," says Kelli Krueger, education director. Before offering Training Zone, she says, they found that members' employees wanted these trainings but didn't want to ask for funding each time. With Training Zone, an agency's members can get ongoing education and personal development anytime without having to ask permission. It also allows them to take advantage of trainings at their own pace.

The All-Access package is also more cost-effective, she says, which has made it an attractive member benefit: "If a member agency wanted to send its one compliance officer through training to earn our Credit and Collection Compliance Officer Designation, it would cost almost \$950 if purchased individually. With Training Zone, an agency of under 50 people would pay \$999 a year for unlimited training, meaning their compliance officer

could earn their designation *and* go through several trainings each month to keep current on what's going on in the industry."

Krueger shares this advice for other organizations considering the development of an all-access training package:

- **Look at the attendance rates of your current educational programs.** If the cost of your training is causing low attendance, packaging your individually high-priced offerings into one lower-cost package could boost your attendance rates.
- **Make sure you have enough educational sessions to create a quality package.** If not, work to add value by regularly adding new and varied content each week.
- **Offer quality content and speakers.** Make sure your content isn't something members can get free somewhere else. Have high expectations for your speakers. ACA requires its speakers to provide research-produced content, not just opinions.

"Be sure that you are both saving members money and adding value," she says. "You could be saving members a lot of money, but if the content you have isn't a value-add, then that won't matter." ♦

Source: Kelli Krueger, Education Director, ACA International, Minneapolis, MN. Phone (952) 259-2118. Email: krueger@acainternational.org. Website: <https://www.acainternational.org/>

KEEP YOUR MEMBERS ENERGIZED

Engage Members With Stimulating Contests

Creating contests that test member creativity while livening up publications or promotional messages or creating a reason to host a party is beneficial and fun. Here are three examples of contests that will engage your members and also let them test their creative abilities:

1. **Photo caption contest.** Looking to engage members in a contest while adding content to member newsletters? Consider a caption contest. Use a photo from a member event, a drawing made by a member or simply do a web search for non-copyrighted images to use. One month place the image in the publication and ask for emailed submissions for caption ideas. Include basic rules about caption length, prohibited language, etc. Next month include the image with the winning caption. The winner gets bragging rights and perhaps the chance to judge the next caption contest.
2. **Play on what's popular.** Piggyback on the popularity of shows

like "American Idol," "Dancing With the Stars" and "The Biggest Loser" that are based on choosing a winner at season's end.

At the beginning of the show's season, have members pick top three or five choices. Offer a prize for the person who picks correct choices in order, including the overall winner. If feasible, host a viewing party to watch the finale and announce the winner. If not feasible, consider including the results in one of your membership publications to congratulate the winner.

3. **Catch a great phrase.** Create a catch phrase contest and ask members to come up with catchy email signature ideas. Whether promoting an event, new campaign or highlighting a new service, email signatures are a great way to spread a message. Ask members to come up with memorable phrases to use in your staff email signatures. If you receive a large number of submissions you can even ask your members to vote on their favorites to narrow down the choices. ♦

How an Exit Survey Can Recharge Your Membership

Exiting or lapsed members may be the most useful resource when it comes to information about how to retain current members. Consider surveying them to help improve your membership program.

Often the reason for a member's leaving may be due to a change in employment or a move. Regardless of the reason, many soon-to-be-former members can offer thoughts on improvements your organization could make.

Most membership organizations are highly skilled at surveying current members, but not so with exiting or lapsed members — perhaps because of the fear of hearing anything negative. But in reality, taking the time to listen to exiting members can help make an organization grow stronger.

What's the easiest way to obtain information? Offer the exiting member a simple questionnaire using a multiple-choice checklist for answers whenever possible. The key is keeping the process simple — long, laborious questionnaires simply will not be completed.

Here are key questions to ask in a member exit survey:

1. What is the main reason you are leaving the organization?
2. Did the membership fulfill your needs? If not, please briefly explain why.
3. Are membership dues affordable?
4. Was our volunteer staff friendly, courteous and knowledgeable during your membership?
5. Would you recommend membership to others? If not, why?
6. What are three ways that we can improve?

The best and most expedient way to contact exiting members is through phone interviews or email surveys. Both are low-cost options.

Contact exiting members as soon as you learn of their requests to leave the organization. Make the survey brief, ask if you can send membership updates in the future and thank them for their prior membership. This can go a long way in leaving that member with a positive and lasting impression of your organization. ♦

BRIEFS

Member Recruitment Tips

Collaborate with another non-competitive membership organization and make a joint offer: two for the price of one. Example: A museum and a symphony could do a joint, one-time-only offer — “Join the symphony and the museum within the next 30 days for half off!” ♦

Members Recruiting Members

Knowing existing members are often the best source of new members, here are two ideas to help that connection happen:

1. Host a prospective member reception with “member benefits” as the theme. Encourage existing

members to bring guests by letting them know prizes will be awarded to anyone who brings prospective members.

2. If your organization hosts an annual conference that includes a hefty registration fee, waive the fee for anyone who recruits a minimum number of new members that year. ♦

MEMBER EVENTS

Leverage Attendance With Tangible Benefits

Beyond the social or altruistic reasons for attending a member event, incorporate tangible benefits for attending:

- An autographed book.
- Continuing education credits.
- Membership dues discounts.

- Useful seminars.
- A photo with a celebrity.
- Complimentary website listing or link.
- Certificate of recognition or appreciation. ♦

A Task Worth Doing

Want your employees to be more in tune with members' wants and needs? Print and distribute desk top signs that read: “Think like a member.” ♦

Time Management Tip

- Here's something to try next time an uninvited colleague asks, “Got a minute?” Turn your three-minute egg timer over on your desk and say, “For you, I have three minutes.” ♦

Forty Under 40 Program Engages Alumni

By Erin Sandage

When the Georgia Tech Alumni Association (Atlanta, GA) needed a way to reconnect and re-engage with alumni, Abbey Callahan took an idea she received from another institution and developed the 40 Under 40 program. The program recognizes 40 outstanding alumni who are under 40 years of age by treating them to an entire weekend of events and activities.

“At Georgia Tech, we’ve got plenty of alumni who know they’re doing incredible things, and another award from Georgia Tech is sort of just another trophy in their case,” she says. “What we needed to do is make sure they’re connecting back to us and kind of channeling that recognition into an engagement with Georgia Tech.”

The program started in 2020 but, due to COVID-19, both years of nominees were invited to campus for the 2021 event. Activities began on Thursday night with the awards ceremony. The night involved networking and hors d’oeuvres so the winners could meet. Friday the winners spent all day on campus. The provost started off the day with breakfast and then student ambassadors took their respective majors to each of the colleges. They had lunch with their dean, spoke in classrooms, had networking receptions and took campus tours.

“We really just immersed them in everything that we could on campus because some of them hadn’t been back in a couple of years. So, it was really an opportunity for us to show off campus but also have them jump in and really reconnect with their schools.”

Friday night included a happy hour at a local brewery in Atlanta where family and friends were invited as well. On Saturday, the alumni attended a home football game where they were invited to tailgate before the game and then hosted in a suite during the game. Some winners took part in the entire weekend; others participated in only some of the activities.

“We had about 55 of the 79 come back to campus for the program. I would say the 16 of those who couldn’t come don’t live in the US and couldn’t make it happen.”

Coordinating the event is no small task. Callahan says it starts early with nominations. Anyone can nominate an alumnus, and multiple nominations don’t carry more weight.

“The thing I really like that I put in place is you have to accept the nomination and give us more information. We don’t put a lot of pressure on the nominator. We ask personal questions like what inspires them, what their most rewarding accomplishment is and how has Tech influenced their success since graduation.”

Nominees have two full weeks to accept the nomination. The selection is done in two rounds; the first round is blind, meaning the nominees’ names and titles are removed so alumni staff can score on accomplishments only. That cuts the pool in half from

roughly 400 nominations to 200. In the 200 round, a selection committee made up of representatives from every unit on campus grades multiple applications using a rubric to score accomplishments, progress and services, which is Georgia Tech’s motto.

“The one thing that’s really clear is it’s not about their dedication to Georgia Tech; we have some awards for that already. The point of the program is to sort of bridge that gap and reconnect them back to us. We’ve got people who are

doing a lot of great things for us like mentoring and giving back financially, but that’s not what this is for.”

Scores are averaged for each application, and the top 40 are the winners, announced in July, giving Callahan time to flood social media, the university website, magazines and newsletters with the news and spark interest in the event. The nomination process is communicated the same way.

Once the winners are chosen, Callahan, who is a one-woman show, plans all the weekend’s events with the help of the winners’ colleges. She first got buy-in from the president of the alumni association and of the institute, which was huge she says.

“He was excited about it because Georgia Tech didn’t have anything like this. He spoke to his colleagues, which were the deans of the school, and told them you all need to be involved in this. Each college had a representative I would work with and became their liaison to the program.”

Callahan says the colleges plan their own events, but she gives them ideas, like having lunch with the dean, attending a class, meeting students, etc. She also relies heavily on a student group that serves as ambassadors of the institution. They escorted winners around campus, took photos and answered questions.

Callahan says the feedback around the entire 40 Under 40 program has been outstanding. She says having the confidence from her team, supervisor and president helped her pull it off, along with campus buy-in and the fact that the 40 Under 40 program is more than an awards event: It’s an entire weekend of re-engagement. ♦

“What we needed to do is make sure they’re connecting back to us and kind of channeling that recognition into an engagement with Georgia Tech.”
— Abbey Callahan

Source: Abbey Callahan, MEd, Director, Student and New Alumni Engagement, Young Alumni Council Advisor, 40 Under 40 Program Coordinator, Georgia Tech Alumni Association, Atlanta, GA. Phone (404) 894-7085. Email: abbey.callahan@alumni.gatech.edu. Website: www.gtalumni.org/40under40