

Membership Audit Report to the National Academy of Forensic Engineers

(August 15, 2019)

B.A.I., Inc. is pleased to present this Membership Audit Report to the National Academy of Forensic Engineers (NAFE). Any questions should be sent directly to Mark Levin, CAE, CSP, who conducted the analysis.

Program Elements

The program included (but was not limited to):

- a) onsite visits and discussions with NAFE staff; **(completed)**
- b) attendance at the 2019 NAFE Summer Conference Board of Directors Meeting and dinner or other event gathering of NAFE leaders the evening prior (Thursday, July 26 thru Friday July 27, 2019) in Denver, Colorado in order to make an initial presentation to the NAFE Board, respond to questions and interact with the any NAFE membership in attendance; **(completed)**
- c) a review and evaluation of all membership-related materials, including printed materials, website content (related to membership), publications, and communications, etc., and providing content revisions for membership marketing materials as necessary; **(completed)**
- d) a review of office/administrative procedures related to membership/member service; **(completed)**
- e) a written report on these audit findings, to include observations, assessments, and recommendations for improvements of membership recruitment and retention materials, membership marketing and retention efforts, member communications, and membership administration; **(completed)**
- f) working with other NAFE leaders and consultants to provide any needed membership data, including member surveys, etc. **(completed)**
- g) an oral summary of audit findings to staff and/or leaders; **(completed)**
- h) Meetings (in-person or telephone) with any member committees working on this project; and, **(completed)**
- i) Ongoing communications with, and support for, all NAFE staff and volunteers involved in this project. **(continuing)**

Deliverables

Based on the activities outline above, the program was designed to produce the following deliverables:

- 1) A membership audit and evaluation: a comprehensive (written and oral) evaluation and report of current membership acquisition, engagement, and retention efforts in the areas of concern; **(Included in following report)**
- 2) Action plan: assistance in preparing a detailed set of recommendations to the staff and volunteer leadership for to assure long-term membership success; **(included in following report)**

3) Ongoing assistance to staff and volunteer leaders during the term of agreement
(**continuing**)

Background

NAFE was formed in 1982 to advance the art and skill of engineers who serve as engineering consultants to members of the legal profession and as expert witnesses in courts of law, arbitration proceedings and administrative adjudication proceedings.

NAFE was also formed to identify and bring together professional engineers having qualifications and expertise as practicing forensic engineers to further their continuing education and promote high standards of professional ethics and excellence of practice.

The NAFE is formally affiliated with the National Society of Professional Engineers (NSPE) and has adopted the NSPE Code of Ethics.

Membership Issues

1. **Membership in NAFE has remained virtually flat over the past five years** (474 members in 2015: 475 members (YTD) in 2019). This is not unusual with professional organizations in general over that period, but it does present reasons for concern for the future.
2. **Member retention is a growing concern.** While new member acquisition is basically replacing members that are dropping out, the fastest growing demographic in the NAFE membership profile is “Former Members.” Of greatest concern are those members who join for only 1-2 years and then leave.
3. **Aging membership.** Because NAFE membership requirements are very stringent and contain minimum experience levels that may take a number of years in practice for potential members to reach, it is understandable that the average age of NAFE members is going to be higher than the norm for similar professional groups. This can cause some problems in branding and recruitment if NAFE is seen as an organization for *older* practitioners rather than as the organization for practitioners with a certain level of expertise (i.e. the leaders in the field). In addition, the ability to attract younger (in relation to the current members) members affects the future volunteer leadership system in NAFE.
4. **Limited Value Perception for those who do not attend events/Conferences.** Although there are many benefits of NAFE membership, there is a feeling among the leadership (Board) that many members who do not participate in the Conferences and other events have trouble identifying the value of NAFE membership.
5. **NSPE affiliation requirement.** The NSPE requirement is one of the cornerstones of NAFE’s history, however it does mean extra dues, extra paperwork, and extra decision-making by non-NSPE members who want to join NAFE.

6. **Lack of marketing outreach.** NAFE is blessed with excellent professional and volunteer leadership in many ways, but membership in NAFE has been, for the most part, an administrative function vs. a marketing function. When potential members apply there is a process for reviewing and approving various levels of membership but until very recently it has been a case of potential members either knowing about NAFE or attending a Conference prior to applying. This makes it difficult to get a steady flow of prospects into the database.

Methodology

In order to assess the various aspects of NAFE's membership management, several methods were used.

- 1) Interviews with NAFE staff
- 2) Interviews with NAFE volunteer leadership (Board)
- 3) Interviews with membership-related committee chairs
- 4) Reviewing the membership-related content of the NAFE website
- 5) Talking with/facilitating discussion with NAFE National leaders at the 2019 Summer Conference
- 6) "Mystery Shopping" – joining NAFE under an alias to enable evaluation of membership communications and reinforcement by receiving them just as a new member would

Evaluation and Recommendations

The focus of the analysis was directed toward these aspects of NAFE membership development:

- a. **New Member Recruitment**
- b. **Intake/on boarding of new members**
- c. **Member Engagement**
- d. **Retention**
- e. **Marketing/Branding**
- f. **Administration**
- g. **Website coordination**

New Member Recruitment

As was mentioned above, member recruitment has been steady but barely keeping membership level, due to dropped members. The main sources of new members, the website and non-member attendees, generate some excellent leads but the follow up on these leads is not producing the numbers it could/should. Leaders have estimated that there may be as many as 1,000 (or more) engineers that currently qualify for NAFE membership who are not members.

The most effective way to recruit new members for NAFE (or any other organization) is through word-of-mouth recruitment. During the assessment period, it was noted that there may be some underlying reasons why current members are not more active in reaching out to prospective members. These include: engineers (as a rule) are not necessarily "sales" oriented, despite the fact that they market their services to clients; some members are uncertain of how to present

NAFE's membership benefits effectively; and there may be some reluctance to recruit people or firms which may become competitors in the marketplace.

Recommendations

There are two basic ways to get more prospective members into the NAFE membership system: - they find NAFE (via website or events); or NAFE finds them (by reaching out via member contact or effective marketing)

- 1. Increase website (membership) traffic.** Since the website is a prime source of members and potential members, NAFE should re-evaluate its SEO and Google ads strategies. It may be worth hiring an outside web marketing person to guide this effort. Another (less expensive) option is to find members, member firms, or (perhaps) someone within the NSPE organization with the appropriate skills, to give advice on how to do this.

NAFE should also be concentrating on raising its internet/website presence to the industries and professions which use the services of NAFE members: legal, governmental, insurance, construction, real estate, etc. This does two things: 1) it will encourage these key decision-makers to ask "are you a member of NAFE?" which will, in turn get those non-members to think about joining; and 2) it will be another benefit of NAFE membership to discuss with potential members.

As was discussed at the Summer Conference, no one is looking to join another organization. They are looking for clients and the ability to solve clients' problems. That is the basis on which NAFE should address its internet presence.

- 2. Raise the percentage of non-member attendees and non-member users of other NAFE programs and services who are converted to members.** These are among the very best prospects for new members, because they have already shown interest in a NAFE benefit.
 - a. When non-members attend NAFE Conferences, include the first year's dues as part of their registration fee. The 50% discount currently offered is more than a year's dues so it is no financial burden on NAFE.
 - b. Offer to credit the non-member differential charged to purchase other NAFE publications, products, or programs toward the first year's dues
 - c. When communicating with these non-member participants, always mention the program or product they have already used. Rather than sending a form letter requesting that they join, start off by saying something like "Thank you for attending our program on (subject). This is just a small sample of the benefits our members get on a continuous basis," etc.
- 3. Increase member-to-prospect recruitment efforts.** Give members the tools needed to feel comfortable asking others to join.
 - a. Develop a member recruitment guide for members, suggesting the best potential members to ask, how to describe the benefits of NAFE membership, etc.
 - b. Offer current members incentives for recruiting new members and also for referring potential members to NAFE Headquarters (or the Membership Committee).
 - c. Publicize the names of members who do recruit new members in NAFE member communications and on the NAFE website. This provides recognition to those who recruit and (hopefully) inspires others to so.

- d. Have an event (reception, etc.) at the NAFE Summer and Winter Conference that is just for members who have recruited a new member in the past year.
- e. Create a Committee to focus on trying to get former members to reinstate their NAFE membership. Former members are a unique prospect group and should be approached on the basis of what is new/different now vs. when they were members.
- f. Continue participating in the Conferences of other organizations (NSPE, ASCE, etc.) where potential members may be attendees and/or exhibitors. Develop a specific follow up plan for leads generated from these events.

4. Review & revise the membership section of the website

The membership part of the website needs a lot of work (more on this under the website recommendations). This looks (from a layperson's view) like an administrative nightmare for applicants. The type is too small, there is no flow, not all of the links work, the matrix is daunting, it's the equivalent of 3-4 pages long before even starting to fill anything out, some of the information doesn't fit the page, etc., etc.

A key to membership growth is making membership as easy as possible. This does not mean lowering any requirements for membership. It is a matter of presentation and user friendliness.

Intake/on-boarding of New Members

The first few months of membership are critical to keeping new members after the first year. This will be even more critical as NAFE (hopefully) begins bringing in more new members as a result of this analysis. Here are some suggestions, based in part by the "mystery shopping" observations.

Recommendations

1. **Revise the new member welcome letter.** It currently is little more than a reminder of benefits (which the prospect was already told about during recruitment) and then a description of how to sign in to the website and other administrative procedures. This letter should start off by telling the new member what a great decision he/she made by joining NAFE, and what he/she can look forward to. Then, acknowledge that as a new member they probably have a number of questions about what's next, and tell them how to answers, etc. Make the welcome letter all about the new member first, then talk more about NAFE.
2. **Have some type of personal contact to welcome new members (in addition to the welcome letter).** Have an officer or Membership Committee member call or email each new member. During this contact, ask questions of the new members about their business or career goals, and how NAFE can help them achieve those goals.
3. **Consider adding a New Member page to the website.** This page could simply be an FAQ-style page for new members.
4. **Be especially conscious of new members who join because of an incentive.** As mentioned above, incentives to join such as reduced dues or Conference fees are great to attract new members, but this can come back to be a problem when they are asked to renew a year later. This second year of membership will not include the same

incentive, so they are going to pay more for the second year. Be prepared to deal with this.

5. **Continue having new members identified at NAFE Conferences.** Have special ribbons on name tags of New Members and First Time Attendees. Tell NAFE officers/leaders to seek these people out and make them feel welcome.
6. **Add a glossary of terms to new member information.** Don't assume new members are familiar with all of the acronyms that stream through NAFE's website, publications, etc.

Member Engagement

One of the big challenges is to find ways for members who don't attend the Conferences to get enough value in NAFE membership to justify the cost.

Recommendations

1. **Promote the non-Conference benefits of membership as heavily as the Conferences.** This doesn't mean you don't want everyone to attend Conference, but you'll never get *everyone* to attend (the % of members attending NAFE Conferences right now is excellent). Try to attach a **value** to each aspect of NAFE's benefits which don't require a physical presence (other than from an office or home office).
 - a. The **NAFE Yahoo** groups (from my non-engineering view) look like an excellent resource for members. These should be promoted not just as discussion groups but as one of the many ways NAFE membership can enhance your credibility (third party input). It's also another way to build partnerships in new areas.
 - b. Access to **the online directory** should be promoted as a one-stop guide to peer support and information.
 - c. **Recommended insurance programs** should be promoted as cost-effective ways to protect your business and your practice.
 - d. **Certification** is both a form of achievement and credibility and also a differentiator for clients.
 - e. The **NAFE library of peer-reviewed publications** provides one of NAFE's primary offerings of continuing education, as well as the ability for members to be recognized as a true leader of the forensic engineering field via being published
 - f. Etc., etc.

While this might sound like wordsmithing or promotional jargon, it's not. It's the truth, as we discussed in Denver. More importantly, none of the things listed above require anyone to get on a plane and go to meeting anywhere, yet they all provide value to members, if presented effectively.

2. **Engage members by asking their opinion.** We described in Denver a potential way to take targeted, short surveys to get more members (especially those who don't attend Conference) engaged in NAFE in an easy way. There are some guidelines for doing this effectively, but NAFE seems to have the kind of membership "culture" that could lend itself to this being a good opportunity to enhance the membership experience.

3. **Keep track of member engagement and identify non-active members early in the program year.** Target them for special communications (such as the survey mentioned above). Make personal contacts with those who don't respond to additional communications.

Member Retention

It's important to get a handle on exactly how well NAFE is currently doing in member retention in the various membership categories. The overall retention rate seems to be in the 85-90% range (which is good) but it would be worth a closer look at when and why the majority of these members are leaving. It would make it easier to set up a specific effort to retain those "at-risk" members at a higher rate. Even with a retention rate at a high level, NAFE is still challenged with replacing 45-50 dropped members with new members each year just to stay even. A focused retention effort could be moving NAFE back over the 500 level with just a small increase in the retention rate.

Recommendations

1. **Create a Member Retention Committee (or Subcommittee) with direct responsibility for member onboarding, engagement, and retention.**
2. **Where possible, customize and personalize member communications based on what is known about the individual member(s) or groups of members.** Try to avoid form letters and Dear Fellow Member letters.
3. **Offer members choices on how they receive communications from NAFE.** Younger members, especially, want to make those kinds of choices for themselves.
4. **Continue to identify ways to make new members and first-time attendees feel special at NAFE events.**
5. **Make member renewal as simple and quick as possible.**
6. **Have a pre-invoice letter sent outlining NAFE accomplishments.** This should be sent **prior** to the first renewal notice to members. They will then have been reminded of the value NAFE provides without having the renewal notice in front of them.

Marketing/Branding

Obviously, NAFE's reputation as an "exclusive" organization is one of the things that attracts engineers to it. "Exclusive" refers to the necessity to attain a certain level of certification, expertise, experience, etc. This makes NAFE membership a goal for many. However, NAFE needs to be careful not to allow the "exclusive" aspect of its reputation be a barrier to membership.

NAFE has this excellent reputation among most of those who are *aware* of it, but not enough engineers are aware of the opportunities in the field or NAFE's role in promoting both the science and the practice of forensic engineering. There are some engineers who probably qualify for membership but haven't joined because of lack of exposure to NAFE, affiliation with another engineering organization (including NSPE) that they feel meets their needs, or they have been contacted by NAFE and didn't see enough value to join.

Recommendations

1. Create a dialogue with NSPE to **find additional ways to use the NSPE membership requirement in NAFE as an advantage of NAFE membership, not a barrier to it.** Include phrases like “as an NSPE member, you already meet one of the most important qualifications to join NSPE,” or, for non-NSPE members, “your membership in NAFE will also entail becoming an NSPE member, allowing you to benefit from two of the leading professional associations in the engineering field.”
2. **Contact other professional organizations which are “stakeholders” for NAFE and offer to provide educational programming for their Conferences.** These organizations are always looking for the best quality educational sessions for their own members, and the exposure to these groups will expand NAFE’s brand and value message. Again, in addition to engineering societies, think of legal organizations, insurance, real estate, etc. There are hundreds of these groups at the National, state, and local levels.
3. **Continue expanding the use of social media to create awareness of NAFE and its members.** As the average age of NAFE members drops (due to retirements, new practitioners entering the field, etc.,) social media will become more of the norm for members and prospects and less of something that has to be learned. These members/prospects will have been using social media since their undergraduate days, and they will expect their professional organization to provide outlets for using it to enhance their education and businesses.
4. Encourage members, especially leaders, to **include their NAFE membership and leadership positions in their introductions, biographies, signatures on their emails, business cards, etc.**
5. **Set quality control standards on everything NAFE does.** As discussed in Denver, NAFE’s brand is, in part, determined by first impressions. Quality control is an important part of any organization’s brand. NAFE is probably held to an even higher standard than many other groups because of its prestige, its membership (engineers are very detail-oriented), and its “culture” (reflecting what its members do).

Administration

Due to NAFE’s limited budget, many of the functions that would normally be done by staff members in similar organizations are handled by volunteers in NAFE. Fortunately, NAFE is blessed with a cadre of experienced members willing to put in the time to produce the many things NAFE offers to its members and the profession.

This can also create a situation where there is sometimes a lack centralized oversight (see quality control, above); volunteers can get burned out by having to fulfill NAFE commitments while running their businesses/practices; and NAFE is limited in its ability to add new programs and services in its attempt to fulfill its mission.

By growing its membership, NAFE can add additional financial and volunteer resources to NAFE's management. By providing funds to perhaps add staff support, or to outsource programs and functions currently being done entirely by volunteers, this raises NAFE's ability to continue adding value to membership.

Recommendations

1. **Work with NSPE to see if additional NSPE staff support can be added** to NAFE's management in the form of administrative support, website development and user friendliness (see next section), database management, etc.
2. **Be careful about taking on too much.** It's not just a question of money. Before new products/services are undertaken there needs to be an assessment of NAFE's ability to deliver them at the very best level.
3. **Where possible, try to centralize communications and decision-making as it applies to members and membership.** It's important for (pardon the old-time reference) the right hand to know what the left hand is doing. Remember, quality control and first impressions are an important part of the NAFE brand. Some sort of communications flow control needs to be formalized, well-communicated to the leadership, and implemented.

Website Coordination

The organizational website has replaced calls the Headquarters office as the way all of NAFE's stakeholders (members, prospects, engineering profession, other organizations, the general public, etc.) find out about NAFE, learn about NAFE, and communicate with NAFE. Almost all of the membership recruitment, engagement, and retention efforts center around the website, too. Marketing is aimed at driving prospects to the site; applications and benefits are on the site; engagement opportunities are on the site; renewal options are on the site.

Recommendations

1. **Add some drop-downs from the home page under the top Membership tab** to allow visitors to go to the section they seek. Limit the number of clicks for all visitors, especially prospective members.
2. **Reverse the information on the membership landing page.** Start with the (updated) list of NAFE benefits before sending them to the how to join section. Make the page more about the prospective member than the organization.
3. **Create some empathy for the reader.** Refer to the exercises done in Denver to create content which lets prospective members know that this could be their new home page, where the organization (NAFE) knows what their daily challenges are and can help them meet those challenges.
4. **Update the information and forms.** Example: the directions ask applicants to fill out the 2016 Application Form. Even if the form is the same, at least update the date on it.
5. **Link membership promotions to specific pages, not just the home page.** Save the prospective members driven to the site through membership promotions some

unnecessary clicks by linking these promotions to specific pages in the membership part of the site, not just the home page.

6. **Add some member testimonials to the site.** Use quotes, photos, and videos to let current members talk to site visitors about how NAFE membership has helped make them more successful, raised their credibility, and helped create new partnerships and friendships.

Next Steps/Action Plan:

1. **Review assessment and recommendations, forward any questions to B.A.I., Inc.**
2. **Assign Committee/Task force to make action recommendations to Board**
3. **Task Force to identify recommended action items, categorized by**

Immediate – easily implemented ideas/actions that don't require Board approval or funding)

Priority - ideas/actions that NAFE should try to have in place within one program year

Long Term – ideas/actions which require more planning, thought, discussion, money, etc. These should be discussed at Annual Planning Meetings

4. **Board to approve Committee Recommendations**
5. **Start to Grow the Academy!**