

Membership Surveys - Part II "Is that your final answer?"

The first part of the article on membership surveys was the May Article of the Month. Part II deals with finishing our discussion of survey elements and proper analysis of the results.

Part one of this article dealt with the reasons for surveys and how they should be undertaken, question formatting, response styles and the sorting process. The most critical aspect of a survey is effective analysis of the results. Part II will examine how best to analyze the statistical information and written responses.

WRITTEN RESPONSES

Every survey should give the opportunity for a written response. It is best to have a section of the survey set aside at the end for these responses. It is inevitable that some members will write all over the place. However, if room is given at the end, most will use the space available. It is important to note on the survey to keep your written answers brief and to the point. Many members will ramble extensively. As will be established later, the written responses are the most important aspect of the survey.

It is common to offer a place at the bottom of the survey for members to sign, give their phone number and ask for a call back to discuss their responses. This is optional, but allows for those members wishing to do so an opportunity to speak to someone about their concerns. Normally one third of the members will sign their survey but only a handful will request a call.

In many clubs there is a concern for the spouses point of view. Some clubs have convinced themselves that it is best to send two surveys to each individual member - one for the member and one for the spouse. Double surveying however is often costly and produces similar answer patterns for both the spouse and the member.

RELIABILITY OF RESULTS

Most survey companies will give the club both the exact number of answers by question sorted to the club's needs and the numerical average of the total responses. The totals allow you to see the impact of the number of responses by category and compare that information to the total membership demographic.

A 40% or better response rate would be considered very reliable information and would closely represent the opinion of the total membership. It is the opinion of this writer that the reliability index is as follows: 40% & up - very reliable, 30-40% - good reliability, 20 - 30% - fair reliability, under 20% - Marginal

It should be noted that in surveying, as in any other aspect of life, people will show up to vote no. A very low survey turnout could be considered positive, as there may be no real issues of concern. It could also mean apathy has set in and there is a distrust of the leadership.

It is important that the survey is marketed and responses encouraged. One may even consider a contest or reward for early responses. It is important to generate reliable information - be it good or bad - if future progress is to be made.

FORMATTING RESULTS

The finished survey should have the following components:

- 1. Statistical overview**
- 2. Consultant's analysis**
- 3. Totals sorted best to worst**
- 4. Answers sorted by category and value**
- 5. Survey data totals**
- 6. Member comments by category**
- 7. Consultant's report to the membership**

1. Statistical Overview

This section details the response rates versus the number of surveys mailed and returned. Total comments are counted by category. The survey format is explained so that the reader can decipher the information correctly. The survey layout is explained and a table of contents is provided.

2. Consultant's Analysis

This is where the quality of your survey firm is important. Operational experience is critical to evaluate the subtleties in answers. They can identify issues and suggest actions that may be taken by either the Board of Directors or club management.

Many times a survey will uncover many very small problems that can be dealt with easily. Sometimes these small problems are a statement of larger, underlying issues that deal with facilities or club policies. The right consultant can help evaluate the problem with sensitivity to the management that has to correct the problem.

3. Totals Sorted Best to Worst

These totals paint a glaring picture of what is rated highest and lowest. It is important to understand both the rating level and the mean. If the lowest rated item is still evaluated good, then there are very few issues. However, if the highest rated item gets less than an expected quality rating, then there may be real problems.

The mean shows the average answer. Some club memberships may not be as difficult to please as may others. The quality of the facilities, products and services may be the same in two different clubs where the overall average of the survey answers is quite different. It is dependent on where the club is on the road to excellence.

A club that began with serious quality problems and has made progress may rate higher than a club that has delivered at an extremely high level for some time

and has slipped just slightly in its services. Once a product or service has been delivered more effectively than before, that delivery will soon become the standard of minimal expectation in the future. A consultant with operational experience is most helpful in analyzing these issues.

4. Sorted by Category and Value

These sorted answers allow you to see the differences in the answer patterns between categories of members. It is important to understand what new, younger members may want in relation to other groups. Are older members as interested in new facilities? Is there a growth in the need for children's programs? Most importantly, how skewed are the answers in favor, or against, an issue in any one group of members.

5. Survey Data Totals

Management generally uses this information for the purpose of reviewing total responses of a group. The number of responses can help validate the answers of that group. A survey may have a 40% response rate but have only 15% of a specific group represented.

6. Member Comment Category

As noted earlier this is the information that will potentially modify the answers to the survey and solidify the real problems. It takes a trained operational eye to analyze the written responses and categorize them into information that can be understood and used effectively by the leadership of the Club.

Answers should be grouped into key areas such as membership, operating departments, finance, policy, rules, Board or Staff. An effective consultant can group similar responses under one written comment that represents many slightly different worded answers.

Comments should be listed by category, with issues receiving the most responses listed first, and on down to those issues receiving only one comment. The leadership can review the comments easily in this format and see immediately which issues received the most comments. I have seen survey reports listing all comments verbatim. If there is interest in reading the comments in this fashion, it is best to review the surveys individually.

Negative comments about individuals should be listed separately from the finished survey package. Members may read the completed survey in the future and disparaging remarks should not be a part of the permanent historical document. These comments can be dealt with as needed from the separate enclosure.

It is important to know what percentage of surveys had written comments. It may also be valuable to note the number of surveys with more than 3 comments. If a Club receives 100 surveys with written responses and 500 comments that would

be an average of 5 comments per survey. However, if 75 surveys accounted for 250 comments, then the balance of 25 individuals, who wrote profusely, made 250 comments on issues or 10 per survey. These 25 individuals obviously form the core nucleus of the most disgruntled members.

7. Consultant's Report to the Membership

The consultant's report to the membership is a separate document from the survey results. It is a summary of the results in a concise readable fashion. The summary includes the statistical profile of responses, categorized results and a brief written overview from the consultant's perspective. Normally this is presented to the leadership for their review before distribution to the membership. In most instances a cover letter from the Club President would be included.

Many clubs will call a meeting of the membership for the consultant to present the findings of the survey. This adds credibility to the process and allows the membership to ask questions or get clarification on issues of importance.

SURVEYING FOR CAPITAL PROJECTS

Surveys should not be used to market or sell a major capital project. Surveys will uncover weaknesses in facilities and services. They are part of the fact-finding portion of long-range planning. Capital projects can then be designed to satisfy those deficiencies. They can be marketed as a response to the needs of the club as determined by the survey results.

SUMMARY

Strategic business modeling is the process of defining success and measuring your progress towards those goals. This is the way the business world measures its success and forms strategies for the future. The goal of any business is to find gaps between its mission and its performance.

Membership surveys are a key aspect of the measuring process in clubs. A survey is a form of performance audit. The process should be taken seriously by both club management and the officers and directors. However, don't enter into this fact-finding process with a thin skin, as the return volley could fall close to home. The whole purpose is to uncover deficiencies and take action to better satisfy your constituency. Your image as a club is better served knowing that you have asked for opinions even if you don't like the answers.

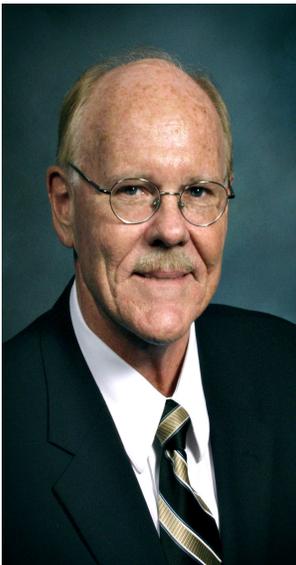
In most cases it is necessary to retain professional help to effectively complete the process. There are many companies available to assist clubs. It is important that any survey firm have operational expertise and no hidden agenda. Beware of firms that:

1. Would like to do future work for the club based on survey results.
2. Will deliver statistics only and has no operational insight.
3. Actively manage other clubs that may, or may not be, in direct competition.

This is not to say that all firms falling into these categories should be avoided, only that the club, its management, and operators understand the relationship in advance of entering into any agreement.

Surveys are only one part of the fact-finding process. There are also focus groups, committees and other solicitations by the club leadership that can generate the information necessary to construct strategic plans for the future. The major issue is that clubs need to be thinking strategically. Remember the following model and establish it as a policy in dealing with members and employees.

- 1. ASK THEIR OPINIONS**
- 2. TELL THEM WHAT THEY SAID**
- 3. TELL THEM WHAT YOU ARE GOING TO DO ABOUT IT**



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