

The Membership Survey Process - Part I

The results of membership surveys are best viewed as a means to an end, rather than an end itself. Used to a club's fullest advantage, information gathered from membership surveys should serve as a mechanism for interpreting change.

It is important to remember that surveys are only a snapshot -- a picture of membership opinions at a specific point in time. The answers to questions today may be different in six months or a year based on the actions taken by the club's leadership or management team.

Over time the true value of the membership survey process can be seen as member opinions shift favorably in response to those actions.

Clubs use a survey for a variety of reasons. Most surveys have a specific purpose and are prompted by the desire to take action on a major agenda item. A large capital investment, a financial crisis, a perceived operational failure or a change in club philosophy can all initiate a desire to survey the membership.

Initial survey results may show support, or many times reflect an opposite point of view, for those agenda items promoted by present club leaders. Whatever the result, an action plan or market approach can be formulated to change minds or build consensus.

THE SURVEY PROCESS

Unfortunately, it is the rare club that initiates a long-term survey process with the purpose of evaluating periodic progress toward goals. Most often a survey's purpose is to advance a single agenda item.

There is nothing wrong with club leaders taking an aggressive approach to accomplishing sweeping change as long as the measurement of periodic progress is not overlooked. It is proper procedure to survey the membership on a regular basis. Results can be used as a benchmark in the future to rate progress in areas of weakness. Use a generic portion of the survey to evaluate specific operational and facility satisfaction issues. The survey can then include a section timely to the larger issues the club presently faces.

For the survey process to be effective it must have three distinct parts. It is better not to survey at all than to skip any of the parts. They are:

1. Ask for member opinions in an unbiased way.
2. Share the results of the survey with the membership in a timely manner.
3. Advise the members as to what actions have been initiated based on the survey results.

So the strategy is to ask for their opinion, tell them what they said, and tell them what you are going to do about it. Unfortunately, the second and / or third

component is often left undone. Such omission lead to survey comments such as: "Why should I bother? Nothing ever happens."

Clubs must follow up the survey with a summary of the results and a letter to the membership. The letter needs to include the interpretation of the results and what actions are going to result from the survey effort. It should be continually referenced how survey results have played a part in the undertaking of new club initiatives. This emphasizes to the membership the value of the survey and is a positive marketing tool that builds confidence.

COST VERSUS VALUE

There are many styles of surveys. A variety of companies have developed their own individual methods for gleaning information. Many use different methods to get to the same result. Some methods are much more time consuming and costly than others. When dealing with club surveys more isn't necessarily better.

Clubs should evaluate what they are getting for the overall cost. Spending more per member does not always mean you will get better, more effective, information that is necessary to make critical long term decisions. Clubs also have different personalities. What works well one place may not be necessary at another and the effort may be a waste of money. Let's examine the elements of a survey.

IN-HOUSE OR OUTSOURCE

Clubs undertaking a membership survey have two resources. They can undertake the process in-house or they can outsource the survey to companies, or individuals, specializing in this area. Although most clubs would be better served by hiring a professional, there are instances when they can accomplish and effective survey in-house. Some companies may argue that undertaking an in-house survey is like operating on oneself. There are, however, some instances where it can be cost effective to survey using club staff and, at the same time, generate credible information.

An example would be a newly hired general manager with some survey experience undertaking a survey. The membership would perceive that person as unbiased with no reason to mistrust the results. There are other instances as well where clubs can complete the process without professional help. It is important to thoroughly evaluate the circumstances before taking such an action. If the membership feels uncomfortable with the process the survey can become tainted.

FORMATTING QUESTIONS

Skeptics are concerned that bias will effect the results. It is argued that the architect of the survey can direct a result equal to their agenda. The format of a question can impact the answer and slant the results. If a member were to be asked, "Do you want an improved fitness center?" the answer may be yes.

However, if they are asked, "Do you want your dues increased to pay for an improved fitness center?" the answer may be no.

It is best to ask all the necessary parts to each question so that the answers can be completely evaluated within the context of all pertinent facts. For example, it is never good to ask a member if they want to build a new clubhouse. The member must know how much it costs, how much will it cost them, what inconveniences they will incur during the process, does it have the services they want and so on and so on. When the purpose of a survey is a major capital project it is always best to deal with a professional surveyor.

ANALYZING FACILITIES & SERVICES

Every survey should have two sections at the beginning that deal with the service areas and the different facilities of the Club. This is true even with a survey that deals with long-range planning and capital issues.

Members should be asked to rate both the services and facilities of the club. The numeric answers to these two sections can now be used to compare to future surveys with the same sections. Examples of items in each of these sections may include the following:

Services / Facilities

1. Front Desk
1. Clubhouse Exterior
2. Business Office
2. Clubhouse Interior
3. Club Newsletter
3. Main Lobby
4. Valet Parking
4. Main Dining Room
5. Golf Shop
5. Public Restrooms
6. Tennis Shop
6. Men's Locker Room
7. Athletics
7. Ladies Locker Room
8. Swimming Programs
8. Tennis Courts
9. Responsiveness of Management
9. Golf Course

Of course the above lists will be personalized to each club. Normally under the services section all the food and beverage outlets could be listed separately.

TYPES OF ANSWERS

Most systems for answering allow for a series of answers that will offer the ability to judge subtle differences. Rather than giving choices of good, average and poor a better format would allow for excellent, good, average, needs improvement and poor. This sequence allows for a more realistic evaluation of a problem. Does a service need improvement or is it horrible. The following are some of the sequences presently being used:

1. Excellent - Good - Satisfactory - Needs Improvement - Poor
2. Excellent - Above Average - Average - Below Average - Poor
3. Strongly Agree - Somewhat Agree - No Opinion - Somewhat Disagree - Strongly Disagree

Satisfaction versus Importance

There is also the sequence that measures the concepts of satisfaction and importance. The argument follows that those areas of most importance should be acted on in a priority fashion. The sequence may follow: Very satisfied - Generally satisfied - Needs Improvement. Then on the same line the sequence: Very Important - Somewhat Important - Not Important.

Research has found that the importance rating is directly proportional to the amount of members answering the question. Therefore, an importance rating can be determined by asking members to respond to only those questions that represent their particular use of the club. Then evaluating the response rate for each question versus the total number of surveys returned.

Is the Club Improving?

This may also be an area that can have informational value. By asking a respondent to rate a service or facility with an Excellent- Good - Fair - Needs improvement - Poor sequence and then ask them to answer a sequence similar to Substantially Improved - Slightly Improved - Stayed the Same - Gotten Worse could allow the club to track progress. It may be important to know that most average answers have a slightly improved attachment versus average answers that all say - gotten worse.

A club could also follow-up a survey six months or a year after the original with a survey using the same service and facility classes but using the answer sequence that tracks improvement. This may be most successfully used when evaluating food and beverage products and services.

SURVEY SORTING

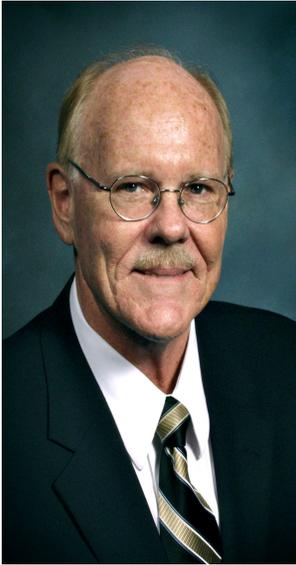
Qualifying questions allow the survey to be sorted by groups of respondents. Membership class, age and number of years in the club seem to be the most common sorts used in the survey process. Most surveys have a tendency of sorting the information into a variety of groups. Many times, the work necessary to process the data in to small sub-groups goes to waste, as the information is really irrelevant to the big picture.

It is normal for clubs to want to sort surveys by classes or groups. However, when you combine the sorting procedure with the response expectation, the number of expected answers could come from such a small percentage of the membership as to make the answers irrelevant. Most of the larger survey companies package a full array of sorts.

The more voluminous the finished product, the more it justifies the fee. There are survey results of 100 pages or more. This amount of information obscures the critical elements. It is better to have easily identifiable, clear results for Boards and Committees.

There are companies that will reduce the cost based on the work required. The less the sorts, the less time required to develop the statistics and analyze the results versus big picture. More is not always better. It is the analysis of the statistics that can have the largest impact in the future.

PART TWO - part two of this article will discuss the analysis process. Topic will be formatting statistics, analyzing written comments, the concept of spouse's surveys, focus groups (when and how), disseminating information to the membership, surveying for large capital projects and which consultant may be right for you.



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