



Innovations in Membership Engagement

A Benchmarking Study

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Project Overview

In the latter half of 2013, Avenue M Group, LLC (Avenue M) conducted a benchmarking study with 14 organizations to examine how organizations are building a sustainable membership model.

The organizations that participated in the study were chosen because of their success in building a membership model that encourages growth and supports their mission, their willingness to participate in the study and their innovative approaches to membership engagement. In addition, this report incorporates the findings from secondary research data collected from organizations that were not responsive to our requests to participate, yet had been profiled in publicly available reports or articles.

As part of our examination of effective practices regarding membership recruitment, engagement and fee structures, we discussed the following topics:

- Types of membership categories
- Pricing and benefits
- Membership recruitment strategies and tactics
- Engagement and onboarding
- Outcomes and lessons learned

We also examined participating organizations' websites and 990 tax forms in order to provide some context for the data collected. Finally, we analyzed the data and applied our knowledge of the association community to create an executive summary and detailed report based on the key findings and results. Not all organizations were available to participate in a telephone interview. Therefore, some of the data was collected from email correspondence and published articles.

The following is a list of organizations included in this study:

1. American Association of Nurse Assessment Coordination (AANAC)
2. American Bar Association (ABA)
3. American Institute of CPAs (AICPA)
4. AIGA| the professional association for design
5. Dallas Museum of Art (DMA)
6. Indiana University Alumni Association (IUAA)
7. HDI: Association for the technical support industry
8. Health Information & Management Systems Society (HIMSS)
9. Metal Treating Institute (MTI)
10. Massachusetts Medical Society (MMS)
11. Rotary International (RI)
12. Society of Petroleum Engineers (SPE)
13. Sweatshop Running Community (SRC)
14. Whitney Museum of American Art (Whitney)

Key Findings and Observations

Years ago, Walter Gretzky, father of Wayne Gretzky (former NHL player and leading point-scorer) described his son's success with the following statement: Wayne Gretzky would "skate to where the puck is going to be, not to where it's been." When Gretzky entered the NHL in 1979, his critics believed he was too small and too slow to succeed. Over the years he grew slightly in size but still finished last in stamina, strength, flexibility and vision tests conducted by his team. How did he become one of the greatest hockey players in history? He used a systematic approach to determine how to stay one step ahead of other players. He studied the game, the players and the plays. He understood the nuances of the game and what was needed to succeed. In sports, success on the field isn't the result of talent or strength alone; rather, it comes from being able to pick up on visual cues, combined with the knowledge and experience to anticipate what will happen next. Top athletes like Gretzky don't have better peripheral vision, they just know what needs to be done with the information they receive.

When individuals think about engagement, they often recall exceptional experiences. In some cases, these experiences occur because they are interacting with a company or organization that understands their needs on a deeper level; they are able to anticipate needs and provide relevant and meaningful solutions.

The following key findings and observations are based on a series of in-depth interviews and a collection of publicly available information on the topic of membership engagement.

1. **Organizations must anticipate change if they wish to expand their base and engage members.** To build a sustainable membership model and engage future generations of members, organizations cannot simply respond to change, they must anticipate it. Many organizations struggle to demonstrate to a younger generation of members the value of belonging to an association. Benefits that attracted previous generations, such as professional development and community engagement, have become ubiquitous as competition from a variety of sources has increased. What hasn't changed, however, are the goals: stay up-to-date, save money, improve productivity, increase profits and advance the industry or field. Although one approach is to offer "best in class" programs, products and services, some organizations have seen a drop in engagement because competitors offer options that are easily accessible and affordable – they offer a *next best alternative* that may not be a superior product but is *good enough*.

One example of an organization that understands this concept is the Metal Treating Institute (MTI). When Tom Morrison became the chief executive officer of MTI, a not-for-profit trade association that represents the largest network of commercial heat treaters in the world, he was faced with the challenge of turning around a declining membership. The industry was changing and, as Morrison stated, "Manufacturing just didn't seem very cool to the younger generation." Although he recognized that not all members desired the same form of interaction and engagement, he knew they wanted to accomplish the same goals. To reverse the trend, Morrison decided to answer the question: "What can MTI do that our members cannot do, or cannot do for themselves, effectively." One of the answers was financial benchmarking to help manage operations and purchasing decisions, including monthly sales statistics, forecasts and quarterly outlooks. Morrison also recognized that he could no longer

"We can't wait for these changes to take place before we make changes to our organization. What works today may not work tomorrow."

- Massachusetts Medical Society

assume that traditional channels to deliver information and education would appeal to the next generation of professionals in the industry. As such, he created a larger digital presence for the organization – even though the existing leadership still strongly embraced many of the more traditional formats.

The Society of Petroleum Engineers (SPE) is another example of an organization that has the discipline to look for changes in the industry and the flexibility to change. In fact, SPE attributes a doubling of its membership to having the foresight to see the expansion of the oil and gas industry globally and adapt their services and reach to ensure long-term success of the Society. In other words, the organization looked ahead to where their industry, markets and membership were going and anticipated future needs, not just current ones. In addition, rather than concentrating only on the market segment the organization was originally created to serve, they understood that their mission included serving a diverse and multi-cultural market. As a result, they adopted practices that would enable them to be innovative in their pricing, delivery of information, and culturally sensitive messaging. Finally, SPE jettisoned unproductive product lines and repurposed others to meet members' needs today.

The Massachusetts Medical Society (MMS) is another example of an organization that redesigned its membership model around its mission and the future of its industry. While many medical societies struggled to grow, or even maintain, their current market share, MMS can proudly claim it achieved a nearly 20 percent increase in its market share in less than three years. MMS was not only able to build a sustainable membership model that would allow physicians to join the organization through a group membership program, it also considered alternative ways to deliver products, programs and services that would benefit the membership. "Our current membership model was not designed to meet the needs of the new generation of physician employees," said Stephen Phelan, Director of Membership. "We realized that we needed to develop a new program that provided specific benefits to employees but would not cannibalize our current revenue structure. Just like the practice of medicine is changing, our model needed to change. We can't wait for these changes to take place before we make changes to our organization. What works today may not work tomorrow," Phelan added. They implemented an operational approach to change by creating a group enrollment program to encourage medium and large healthcare institutions to enroll most, if not all, of their physicians in the Society. To participate in the program, groups must have five or more physicians on staff. Since the program's inception, the number of members in the group enrollment program increased by 100 percent and the organization saved \$10,000 in renewal expenses.

A workforce study conducted by Merritt Hawkins in 2011 revealed an increasing trend towards physicians becoming employees of hospitals rather than hanging out their own shingle or joining a group practice. In addition, advancements in technology, shrinking budgets and other financial constraints all pose threats to the current membership model used by medical societies.

2. **Membership categories are being designed around needs, interests and benefits rather than title, position or age.** At its core, membership benefits are more than just a transactional exchange of programs, products and services. For many, it is difficult to define the benefits in terms of a financial value. Organizations must provide an opportunity for members to build meaningful relationships, support a cause or be stewards of a reputation that is intrinsic to the advancement of the profession. As such, we've seen a trend toward building a membership program that encourages members to choose a category that will best meet their individual needs.

As organizations struggle to attract and engage the next generation of members, it is essential they tap into the needs and values of this group. One organization that has changed its membership model is AIGA, the professional association for design. In a bold move to transform the organization, the leadership and senior management instituted some major changes in the types of benefits it provided to members, how benefits were delivered and its pricing structure.

Based on research it conducted with members, AIGA determined that if they were going to successfully attract the next generation of members, they must address the following needs:

- Participation
- Contribution
- Ownership
- Rich experiences
- Curation
- Relevance
- Clear sense of values.

“By tapping into each individual’s core values and allowing them to customize their benefits, we hope to deliver a bespoke membership that is meaningful to them personally and responds directly to their interests and needs.”

- Whitney Museum

According to Richard Grefé, Executive Director of AIGA, “Three things are most important to us today: leadership, relevance, and opportunity. Leadership, because designers were creative all their lives, they pride themselves on being different. By the time they hit their 20s they want to do more, but they are perceived to be outsiders, so they don’t assume leadership positions. So we want to move the creative from the outside to the center. We also want society to understand their relevance because this will create opportunities.” This transition to a participatory membership model, Grefé believes, will keep members engaged. To achieve this goal, AIGA restructured so that there was a greater emphasis on the benefits delivered at the chapter level. First, it needs to serve as the authoritative voice (formal/passive). Second, the organization must support activities that help members create their own efforts and activities that interest

“If we could eliminate the resistance to pay – it holds us accountable to perform better. If we want to move them up the ladder of membership it will happen because we’ve earned it.”

- AIGA

them at the chapter level (active/informal). The result is a pricing/benefits structure that allows all members to “pay what they want” based on their individual needs and not a set of demographics restrictions created by the organization. Grefé cautions that this type of change requires a long-view investment. Although AIGA has seen some overall membership growth and the number of chapters have doubled, revenue is down slightly. Another issue AIGA must face is a lack of support from some members of the Baby Boomer generation. “The older generation wants the affiliation with AIGA to be around the skills that made them distinctive - a sense of exclusivity - and we have moved to an inclusive model in order to have a greater voice,” Grefé adds.

3. **Highly targeted and buzz-worthy experiences help improve engagement and retention rates.** Appealing to all generations of members requires more than creating new membership categories or adopting a new pricing strategy. Too often, organizations try to meet the general needs of a large group rather than create meaningful yet more exclusive experiences that will generate *off the chart* Net Promoter Scores (how likely are you to recommend the organization, program or product). Bucking a downward trend of most alumni associations, Indiana University Alumni Association (IUAA) experienced an increase in membership over the

last nine months of the fiscal year that ended June 30, 2013. At that key point, the IUAA totaled nearly 58,000 paid members, compared to about 56,600 in September 2012. The growth is a result of nine consecutive months of membership increases, which enabled the IUAA to increase revenue 10.7 percent over fiscal year 2012. More importantly, the increase challenges a 10-year trend of declining membership in the IUAA. The recent success is aligned with the association's five-year strategic plan, which outlines a renewed emphasis on membership acquisition and retention.

How was IUAA able to make this happen? According to J. Thomas Forbes, Executive Director and CEO of the IUAA, "The days of rallies and large scale events as a way to engage alumni are over." Instead, IUAA tries to create unique, relevant and memorable experiences for members with the greatest potential to join. **Using data gleaned from a propensity study, the organization creates smaller, more targeted events that bring together individuals with a common interest. This enables IUAA to forge stronger bonds with individuals who are most likely to join, donate and renew year after year.** According to Forbes, having a clear marketing strategy and making decisions based on research played a key role in the membership growth as well. IUAA uses a market segmentation strategy that takes generational and campus experiences into account. IUAA focused its efforts on alumni who had the greatest propensity to join the organization rather than cast a wide net in its direct mail efforts. "A renewed focus on member stewardship also supports the strategy. More alumni involvement strengthens the IU alumni network because it enables enhanced career services, more meaningful events, and stronger technological infrastructure," commented Forbes. He added that, "Membership dues also contribute to student scholarships, school and campus alumni outreach, and regional chapter activity."

One example of an organization that is hoping to expand its membership base and develop a relationship with a younger generation is the Dallas Museum of Art (DMA). At the beginning of 2013, DMA announced the return to free general admission and the launch of an innovative new membership model available to the public for free. The new program, DMA Friends & Partners, approaches membership as a program of engagement that is intended to build long-term relationships with visitors and to emphasize participation over the transaction-based membership model that has become common practice among museums. In addition to providing free general admission for all visitors, the Museum will offer two membership tracks that further visitor engagement:

"We want to provide our audiences with enhanced ways to feel connected to the Museum and to share their opinions with us and each other. We hope to build a virtual community as strong as our physical one."

- Dallas Museum of Art

- The DMA Friends program provides free membership to anyone who wishes to join and includes opportunities for increased access to Museum programs and staff, incentivizing participation through recognition and à la carte rewards.
- The DMA Partners program seeks the support of individuals, corporations and foundations desiring to be a part of the Museum's efforts to deliver access to its extensive collection and diverse public programs. While DMA Partners will receive benefits commensurate with their giving, their philanthropic involvement with the DMA enables the Museum to provide free admission and membership to the community at large. DMA Partners can contribute at a variety of levels, starting at \$100 per year.

The implementation of the new admissions and membership program is supported and enhanced by a comprehensive software system at the DMA that encourages visitor interaction with the Museum, whether

they are on-site or online. The opt-in system tracks participation, allowing visitors to chart their own activities and enables the DMA to better understand patterns of visitor engagement and the long-term success of Museum programs. “New technologies and online participation are already an integral part of many visitors’ daily lives,” said Rob Stein, the DMA’s Deputy Director. “As part of our new approach to visitor engagement, we want to provide our audiences with enhanced ways to feel connected to the Museum and to share their opinions with us and each other. In doing so, we hope to build a virtual community that is as strong as our physical one. The DMA Friends program uses technology to demonstrate to our visitors that the DMA recognizes the value they bring to the Museum when they engage deeply in sharing their creativity and ideas with us.”

4. **Gamification strategies are becoming more prevalent as organizations seek to build stronger relationships with their members.** Games can provide a unique way to motivate and empower members. Aside from the fun and enjoyment, games allow people to be more creative, productive and even hard-working. Bohyun Kim defines Gamification as the process of applying game-thinking and game dynamics, which make a game fun, to the non-game context in order to engage people and solve problems. (["Harnessing the Power of Game Dynamics Why, How to, and How Not to Gamify the Library Experience."](#) *College & Research Libraries News*. 73, no. 8 (September 1, 2012): 465-469.) From leaderboards to badges, there is a growing trend by organizations to use gamified platforms to enhance member engagement and increase the likelihood of renewals. According to Gabe Zichermann, co-author of the book *The Gamification Revolution*, “Millennials were brought up on games, and that changes the way their brains work.”

Years ago, some organizations created member loyalty programs that rewarded participation by offering perks such as free education or free products with the purchase of a certain quantity – i.e., buy 10 get 1 free punch-cards. With the advent of smartphones and apps, rewards programs can now offer perks in exchange for other activities. A few advantages to Gamification through mobile apps is the immediacy of the interaction and a lower cost for implementation and execution. An additional benefit of using smartphone technology to manage a member loyalty program is the ability to leverage social media. For example, associations can reward members for posting something about the association on Facebook, LinkedIn or Twitter.

Gamification:

- Adds a virtual layer to the physical world. Mobile apps can increase interest in a variety of activities by giving away points and badges and displaying a leaderboard to showcase member engagement (and create a sense of competition).
- Games are increasingly being used by organizations to encourage participants to improve performance by providing immediate and detailed feedback. Once a series of courses are completed, organizations can offer members badges they can display on their LinkedIn profile or other social media sites.

“One of the lessons learned from the experience was that there was an opportunity to extend the game play beyond the event. They also saw opportunities to expand the game play to the chapter level and offer year-round exposure with detailed metrics for premium sponsors.”

- Green Meeting Industry Council

In 2011, the Green Meeting Industry Council (GMIC) experimented with Gamification by creating a conference called Game ON! GMIC selected the game format because they saw it as an opportunity to engage stakeholders and as a way to make non-game material more engaging. The concept behind Game ON! was developed from the book *Total Engagement: Using Games and Virtual Worlds to Change the Way*

People Work and Businesses Compete by Byron Reeves and J. Leighton Read. According to the authors of the book, there are several key ingredients to creating a successful Gamification program:

1. **Leaders.** Games are more successful if there are leaders who can help other “players” make sense of the game and provide a vision for success.
2. **Narrative context.** A challenging story or theme will make a game more fun and engaging.
3. **Feedback.** There should be a process for quick and immediate feedback from the players.
4. **Ranks/Reputation.** Most games create hierarchies in which tasks, privileges and rewards are assigned by rank and reputation.
5. **Competition.** A set of rules established to create a sense of competition is an essential component to keeping members engaged after they’ve started the game.

The purpose of the game designed by GMIC was to immerse players in a sustainable event universe where they could immediately apply what they learned to a realistic situation. To enhance the experience, the organization incorporates the use of case studies, teams, conference content, a custom App, pre-conference integration and onsite integration. One of the lessons learned from the experience was that there was an opportunity to extend the game play beyond the event. They also saw opportunities to expand the game play to the chapter level and offer year-round exposure with detailed metrics for premium sponsors.¹

Other organizations have deployed gaming tactics to engage members and participants in organization activities. During the 2013 PCMA Convening Leaders conference, attendees had an opportunity to participate, compete and win prizes – even if they were unable to attend the event. The core elements that make this type of experience a success, according to Kurt Nelson, president and founder of The Lantern Group, include:

- High quality content. Members or registrants will only stay engaged if the content is relevant.
- Meaningful prizes. While the prizes don’t have to be iPads, it should be something people will appreciate and use. Gift cards often work well as a source of motivation.
- Interactive play. The best way to build excitement is by letting participants interact and see how each player is performing.
- Promotion and education (about how the game works). High levels of participation will depend on both an awareness of the game and how it is played. Using key influencers and industry leaders to help spread the word may help with promotion.
- Simplicity. If the game is too complicated, people will simply opt-out or drop out. Avoid planning a game that is not simple to learn and simple to play.
- Duration. It is important for an engagement game to have a start, middle and end. If you set a goal, you will need to create a deadline by which it can be achieved.

The American Bar Association (ABA) used a game to encourage its leadership to recruit other members. Paula Cleave, Division Director, Membership led the initiative that offered rewards for referrals. Although it appears to be a typical member referral campaign, there are many elements that helped gamify the process and added to its success. “...we offered a tiered based reward system where members could earn certain prizes such as iPods and iPads.” Cleave leveraged social media, direct mail and email to promote the campaign and used a web-based portal to allow members to check their status. Within three years, the ABA had recruited more than 7,500 members through this channel. After an initial program launch that only included a select group of volunteer leaders, Cleave invited ABA staff to participate and earn prizes.

¹ Case Study: Game ON! The Gamification of the 2011 GMIC Sustainable Meetings Conference, Elizabeth Valestuk Henderson and Mitchell Beer, 2011.

Cleave believes the program succeeded because: 1) The volunteer leadership and senior staff threw their support behind the program, 2) The program was integrated into events and meetings, the website and their social media presence, and 3) They tracked the progress and shared it with other program participants.

The Dallas Museum of Art (DMA), as mentioned earlier in this report, developed a game to increase the level of engagement of its visitors. To track the success of its program, DMA measures repeat visits, diverse participation, increased affinity and the ability to motivate action. DMA Friends is a free membership program that allows visitors to earn badges and points to unlock special rewards when they visit the DMA. Badges are bundles of activities that recognize DMA Friends that interact often with the Museum. They offer new ideas about ways to use the DMA.

DMA offers members the opportunity to earn points that unlock special rewards, like discounts on shopping and dining, free tickets to special exhibitions and access to exclusive experiences at the Museum. The results of the new program are impressive. The program launched in January 2013, and within seven months, more than 22,000 individuals had signed up for the free membership. Ninety percent of the new members had never had a relationship with the museum before the launch of the program.

5. **Online communities connect members to each other (not just to the organization).** The American Association of Nurse Assessment Coordinators (AANAC) saw a clear connection between creating a highly engaged online community and membership retention. With annual renewal rates hovering around 65 percent, AANAC hoped to provide more value to its members by connecting them with each other and providing searchable resources of archived information. Although AANAC's demographic was older, and had not "grown up" with the technology, the organization believed the value of offering a robust online community far outweighed any potential challenges. Wanting to create more than an expanded listserv, AANAC used a tool developed by Higher Logic that provided members with the opportunity to:
- Read and contribute to discussions on hot topics and issues in the long-term care field
 - Share experiences and knowledge related to their work
 - Find and share solutions in the resource library with other members

To encourage participation, AANAC offered expanded networking and learning opportunities that were directly tied to specific educational events. For example, staff will invite attendees and speakers from both in-person and online events to connect within the online community. They provide a space for handouts, encourage the sharing of tips prior to the meeting (what to wear, what to expect, places to visit and stay) and create opportunities for first-time attendees to build connections prior to the event. The results of these efforts speak for themselves. AANAC experienced a 13 percent increase in renewals from 2012 to 2013.

Online communities help organizations increase member engagement if they offer the following benefits:

- One location to share tips and resources
- A safe and secure network for asking questions
- Members-only access to peers and experts
- Members-only access to user-generated content on relevant topics
- Anytime, anywhere access to all of the above.

As use of mobile technology grows, organizations realize they must ensure their online communities evolve to meet the needs and interests of their members. Content delivery must be designed for mobile access. Interactive polls and discussions must be accessible from smart phones and tablets. In addition, content experts (speakers, authors and contributors) must be trained to ensure they are responsive to real-time

questions and comments. Although the rewards may seem great, the creation of online communities does carry some risks and challenges. User-generated content must be monitored to ensure information is accurate and of high quality; discussions may become dominated by a few experts or contributors and new users may feel they have become lurkers rather than participants if there isn't a strategy to engage them. Some of the tools being used by organizations to engage new participants include polls, surveys and rewards for engagement.

Figure 1.0 Dallas Museum of Art – Badges and Rewards



What an eye you have!
Create your own collection by selecting ten or more works of art you love. Text each artwork's accession number (found on the wall label) to 214-390-9693 and receive the Collector Badge.



Ladies and gentlemen, children of all ages . . .
step right up to see the spectacular sights of the DMA. Bring three people with you on your Museum visit and receive the Ringleader Badge. Come one, come all!



	<p>One Special Exhibition Ticket</p> <p>Receive one free admission to a DMA ticketed exhibition.</p>	3,000 Points
	<p>Into the Deep</p> <p>Join other DMA Friends to tour the deep recesses of the DMA's collection and art storage.</p> <p>Only 4 Left</p>	25,000 Points

Figure 2.0 AANAC Online Community



Benchmarking Study Participants

AIGA | the professional association for design

AIGA is an American professional organization for design. Founded in 1914 as the American Institute of Graphic Arts, AIGA remains the oldest and largest professional membership organization for design and is now known simply as “AIGA, the professional association for design.” Today, the organization has 23,000 members and 67 chapters. AIGA advances design as a professional craft, strategic advantage and vital cultural force. As the largest community of design advocates, AIGA brings together practitioners, enthusiasts and patrons to amplify the voice of design and create the vision for a collective future. AIGA defines global standards and ethical practices, guides design education, inspires designers and the public, enhances professional development and makes powerful tools and resources accessible to all.

Why they were included in the study:

In order to achieve a more open and inclusive community with a shared interest in design, AIGA launched a new approach to member participation in August 2012. AIGA shifted from a membership model based on the stage of an individual’s career to one that reflects the member’s interest in and commitment to AIGA and all that it entails: adhering to the profession’s principles, advocacy of the value of design, support for designers’ interests and stimulating conversations critical to design’s future. Their goal is to double membership - to 40,000 members - by 2014.

Game Changer:

AIGA redesigned its membership structure order and resource allocation. It transitioned from a top-down organization to a grass-roots, chapter-driven model that allowed individuals to choose their membership level based on their needs and interests rather career stage. The organization is radically redefining the membership model by allowing increased autonomy and input from the next generation of members. They created new membership categories based on level of participation, interest and contributions.

American Bar Association (ABA)

The ABA is one of the world’s largest voluntary professional organizations, with nearly 400,000 members and more than 3,500 entities. It is committed to doing what only a national association of attorneys can do: serving its members, improving the legal profession, eliminating bias and enhancing diversity, and advancing the rule of law throughout the United States and around the world. Membership in the American Bar Association is open to U.S. licensed lawyers, non U.S. licensed lawyers, law students in ABA accredited law schools, students enrolled in higher-education studies and non-lawyers such as paralegals, law librarians, economists and others.

Why they were included in the study:

Effective member referral programs leverage active communities to increase awareness and promote membership and its benefits. The ABA’s referral program gave members the tools they needed to encourage others to join and become engaged.

Game Changer:

The program succeeded on a variety of levels. First, the volunteer leadership and senior staff threw their support behind the program. Second, the program was integrated into events and meetings, the website and ABA’s social media presence. Finally, they tracked the progress and sent members status updates. To encourage staff involvement, the ABA’s executive director awarded prizes to top recruiters on the staff in addition to the members. Prizes included a full comp day or a half comp day to the top recruiter.

American Institute of CPAs (AICPA)

The AICPA is the world's largest member association representing the accounting profession, with more than 394,000 members in 128 countries and a 126-year heritage of serving the public interest. AICPA members represent many areas of practice, including business and industry, public practice, government, education and consulting. The AICPA sets ethical standards for the profession and U.S. auditing standards for audits of private companies, nonprofit organizations, federal, state and local governments. It develops and grades the Uniform CPA Examination and offers specialty credentials for CPAs who concentrate on personal financial planning, fraud and forensics, business valuation and information technology.

Why they were included in the study:

For the fifth consecutive year, AICPA reached record-breaking membership levels, with more than 358,000 regular voting and nearly 386,000 total members at July 31, 2012. These results reflect the AICPA's continuing efforts to provide value to the profession to attract new members and retain their current membership base.

Game Changer:

The AICPA made three major changes to its approach to membership recruitment and retention that resulted in significant growth and higher retention rates. First, the organization made a major investment in its infrastructure in order to provide more high touch and high tech customer service to members and prospects. In the area of high touch, AICPA made phone calls to every member who had not renewed their membership. They expanded these efforts to making calls to new members as well. They also overhauled their website and communications to better enable members and prospects to interact with the organization and complete online transactions. Second, they significantly improved their market segmentation efforts to ensure they were sending the right messages to each audience. Finally, the AICPA "got better at speaking their language." The value was there, but the language being used to communicate the value of membership did not resonate with members and prospects.

Dallas Museum of Art

Established in 1903, the Dallas Museum of Art (DMA) ranks among the leading art institutions in the country and is distinguished by its innovative exhibitions and groundbreaking educational programs. At the heart of the Museum and its programs is its global collection, which encompasses more than 22,000 works and spans 5,000 years of history, representing a full range of world cultures. Located in the vibrant Arts District of downtown Dallas, the Museum welcomes more than half a million visitors annually and acts as a catalyst for community creativity, engaging people of all ages and backgrounds with a diverse spectrum of programming, from exhibitions and lectures to concerts, literary events, dramatic and dance presentations. The Dallas Museum of Art is supported in part by the generosity of Museum members and donors, the citizens of Dallas through the City of Dallas Office of Cultural Affairs and the Texas Commission on the Arts.

Why they were included in the study:

DMA moved away from the traditional museum membership model that focused on pay for access to a free entry-level membership program that opens their doors to everyone in the community with the hope of building long-term relationships.

Game Changer:

The Dallas Museum of Art announced a return to free general admission and the launch of an innovative new membership model available to the public for free. The new program, DMA Friends & Partners, approaches membership as a program of engagement that is intended to build long-term relationships with visitors and to emphasize participation over the transaction-based membership model that has become common practice among museums. Launched on January 21, 2013, the program was intended to enhance the DMA's role as the region's largest municipal museum and a vital community asset that rewards cultural participation in novel ways

and provides meaningful experiences with art to visitors free of charge. DMA Friends & Partners should also enable the Dallas Museum of Art to strengthen existing relationships with constituents as well as forge new ones, expand audiences throughout greater Dallas, and build a robust global online community. In addition to providing free general admission for all visitors, the Museum will offer two membership tracks that further visitor engagement: free membership and partner support beginning at \$100.

Health Information and Management Systems Society (HIMSS)

HIMSS is a global, cause-based, not-for-profit organization focused on better health through information technology (IT). HIMSS leads efforts to optimize health engagements and care outcomes using information technology. HIMSS is a part of HIMSS WorldWide, a cause-based, global enterprise producing health IT through leadership, education, events, market research and media services around the world. Founded in 1961, HIMSS WorldWide encompasses more than 52,000 individuals, of which more than two-thirds work in healthcare provider, governmental and not-for-profit organizations across the globe, plus over 600 corporations and 250 not-for-profit partner organizations that share this cause.

Why they were included in the study:

The organization more than quadrupled in size in just over ten years and is now accepted as a global leader in the field of healthcare technology. Although this may appear to be a success story built around being at the right place at the right time, the story behind the success at HIMSS shows it was more the result of a series of strategic moves. In 2007, membership in HIMSS totaled just over 17,000. In six short years, membership grew to nearly 50,000, including 570 corporate members and more than 225 not-for-profit partner organizations.

Game Changer:

HIMSS redesigned its membership model to focus on: 1) Ways to engage everyone involved in advancing their mission and 2) Providing benefits and offerings that are valuable because they offer something members cannot obtain or achieve on their own. Although healthcare and technology are two of the hottest issues being discussed today, the old membership model was not designed to attract the entire population of prospective members who would help the organization achieve its mission. Because HIMSS members did not solely control the achievement of the mission of the organization, they expanded the definition of membership and engaged in a lot of activities trying to reach people other than members. The result was a model that offered membership to everyone at a hospital, regardless of his or her position. According to Steve Lieber, President & CEO, "it won't cost you a dime more to add those people. So I wanted to take away the economic diffusion as a member."

HDI

Founded in 1989, HDI is a global membership, training and certification association for technical support professionals. HDI's curriculum and resources address the needs of technical support professionals throughout their careers and the various maturity levels of their support operations. Formerly known as the Help Desk Institute, the company was rebranded in 2005 to HDI as a means to acknowledge the expanding role of the support center and the maturing service management industry. HDI is vendor-neutral in its efforts to facilitate open, independent networking and information sharing within the association's global network. Guided by an international panel of industry experts and practitioners, HDI serves a community of more than 120,000 technical service and support professionals and is the premier resource for best practices and emerging trends.

Why they were included in the study:

HDI offers many of the same benefits as traditional not-for-profit associations with a few exceptions. From professional development, training and certification, to the creation of a local chapter network, mentoring and career advancement, HDI resembles many professional societies in the United States. The organization also faces similar challenges including attracting and engaging young professionals.

Game Changer:

In the spring of 2013, HDI redesigned its membership structure to better meet the needs of its members. The former membership structure used a nomenclature for membership categories that created a sense of confusion among members and prospects because the benefits were unclear and the names lacked meaning and relevance. Based on feedback from members and the HDI Member Advisory Board, HDI clarified and expanded the range of benefits available at each level, adjusting the model to better fit members' needs and maximize the overall value of HDI membership. With that forward momentum, a new HDI membership model was born.

Indiana University Alumni Association (IUAA)

As one of the nation's largest alumni organizations, serving more than 580,000 graduates worldwide, the IUAA provides many programs and services to its members, nonmember alumni and the university. IUAA serves all alumni, but it's the loyal and supportive members who make its services and programs possible. The purpose of IUAA is to be a voice in issues that affect IU's future, connect members to volunteer and community outreach projects, be a loyal companion as alumni move forward in their careers, put down roots and explore the world.

Why they were included in the study:

Bucking a downward trend of most membership organizations around the country, the Indiana University Alumni Association experienced an increase in membership over the last nine months of the fiscal year that ended June 30, 2013. At that key point, the IUAA totaled nearly 58,000 paid members, compared to about 56,600 in September 2012. The growth is a result of nine consecutive months of membership increases, which enabled the IUAA to increase revenue 10.7 percent over fiscal year 2012. More importantly, the increase challenges a 10-year trend of declining membership in the IUAA. The recent success is aligned with the association's five-year strategic plan, which outlines a renewed emphasis on membership acquisition and retention.

Game Changer:

Although the number one reason members join IUAA is because they feel a sense of pride, Net Promoter Score evaluations conducted by the organization revealed that high member loyalty, engagement and satisfaction were more likely to occur as a result of delivering high value experiences. When IUAA created experiences that connected back to its mission, they changed from being just a member-based organization to one that is rooted in a cause. To better understand where to invest their time and money, IUAA invested in a propensity model so they could focus their efforts on individuals with the greatest likelihood to join, become engaged and renew. Bottom line: focus on the 20 percent who have the greater likelihood of joining, donating and becoming engaged; instead of creating large rallies that are unlikely to resonate with anyone, create smaller, targeted and relevant experiences.

Massachusetts Medical Society (MMS)

The Massachusetts Medical Society is the statewide professional association for physicians and medical students. The MMS is dedicated to educating and advocating for the patients and physicians of Massachusetts. The MMS publishes the *New England Journal of Medicine*, a leading global medical journal and web site, and Journal Watch alerts and newsletters covering 12 specialties. The MMS is also a leader in continuing medical education for health care professionals throughout Massachusetts, conducting a variety of medical education programs for physicians and health care professionals.

Why they were included in the study:

While many medical societies struggled to grow, or even maintain, their current market share, the Massachusetts Medical Society achieved a nearly 20 percent increase in its market share in less than three years.

Game Changer:

The old membership model was not designed to meet the needs of a new generation of physician employees. According to Stephen Phelan, Director of Membership, “We realized that we needed to develop a new program that provided specific benefits to employees but would not cannibalize our current revenue structure. Just like the practice of medicine is changing, our model needed to change. We can’t wait for these changes to take place before we make changes to our organization. What works today may not work tomorrow.” They implemented an operational approach to change by creating a group enrollment program to encourage medium and large healthcare institutions to enroll most, if not all, of their physicians in the Society. To participate in the program, groups must have five or more physicians on staff. Participation is an important component of the group membership program. Groups of five or more physicians are eligible to receive discounts with a minimum of 75 percent participation of its physician employees. The higher the participation, the larger the discount. In addition, group enrollment offers practice management benefits including simplified billing, reduced practice administrative hassles for physicians and electronic access to the highly coveted *New England Journal of Medicine*. Since the program’s inception, the number of members in the group enrollment program increased by 100 percent and the organization saved \$10,000 in renewal expenses.

Metal Treating Institute (MTI)

The Metal Treating Institute represents the largest network of commercial heat treaters in the world. MTI also represents manufacturers with in-house heat treating operations and suppliers who serve both commercial and captive heat treaters. When Tom Morrison became the chief executive officer in 2005, the organization was struggling with a declining membership in a changing industry. Although the older members enjoyed the social and networking aspects of the organization, manufacturing just didn’t seem “very cool to the younger generation,” Morrison explained. Yet, he didn’t want to remove one of the key benefits the association provided to its members –the chance to shake a hand and make a connection that could lead to new business opportunities.

Why they were included in the study:

Although Morrison recognized that not all members desired the same form of interaction and engagement, the goals were the same: to save money, improve productivity and increase profits. As such, Morrison focused on one important question: what can MTI do that its members cannot do, or cannot do for themselves, effectively? MTI limited its efforts to just five goals:

1. Organize to better coordinate members’ activities to achieve their goals
2. Lower individual costs by distributing expenses across a broader network
3. Access market intelligence, industry research and best practices in training
4. Expand business opportunities through members-only networking opportunities
5. Stay up-to-date on industry news and information without dedicating too many resources (financial or human)

Game Changer:

The results of these efforts was the creation of five primary benefits of membership: 1) Networking opportunities for business development at the local, state, national and international levels, 2) Online and face-to-face training, 3) Customized leadership development for top management in the industry, 4) Financial benchmarking to help manage operations and purchasing decisions, and 5) Industry news and information.

Although many organizations offer a similar list of benefits, what makes MTI's benefits so valuable is that the organization has invested its time and resources in creating best-in-class offerings that are customized for the industry.

Rotary International (RI)

Rotary International is a volunteer organization with 33,000 clubs in over 200 countries and geographical areas. Perhaps most widely known for its efforts to eradicate polio, Rotary's main objective is service — in the community, in the workplace and around the globe. The 1.2 million Rotarians who make up more than 33,000 Rotary clubs in nearly every country in the world share a dedication to the ideal of *Service Above Self*. In order to live out that ideal, Rotary International initiates humanitarian projects that address today's challenges affecting the world today, such as hunger, poverty and illiteracy.

Why they were included in the study:

RI has been around for more than 100 years. The organization could very well be satisfied with its lengthy and successful history of doing good things and its dedication to service. The brand is well-known and its reputation is stellar, among members and the public. Yet, in 2010, the organization's new strategic plan included as one of its top priorities "to support and strengthen clubs." Furthermore, one of the major ways RI felt it could achieve its goal was by fostering club innovation and flexibility.

Game Changer:

Feedback from surveys and focus groups showed that prospective qualified members and younger-aged Rotarians wanted and needed more flexibility in order to become or remain involved with a Rotary club. With that in mind, and to coincide with the strategic planning goals, the organization launched several new pilot programs with the purpose of allowing Rotary clubs to experiment with flexible memberships and club operations. Each pilot program was designed to improve recruitment and retention, allow for flexibility in club operations and structures and provide Rotary clubs with an opportunity to explore new and innovative ways to promote member diversity, all of which, again, are goals of the Rotary International Strategic Plan.

Three of the pilot programs are: satellite clubs, associate members, and an innovative and flexible Rotary Club. Each is an experiment in offering members flexibility, both with ways to belong to the organization as a whole and overall Rotary Club management and operations. The common idea behind each different program is flexibility. It's about allowing different clubs to conduct diverse activities and encouraging individual members to experience membership uniquely. The premise, as Rotary International sees it, is to encourage clubs to be fun, dynamic, diverse, resilient, tolerant, interested in trying new things, member driven, inspirational and relationship rich.

Sweatshop Running Community (SRC)

Sweatshop was founded in 1971 by Chris Brasher, who, on May 6, 1954, became part of athletics history by helping to pace Sir Roger Bannister to the first sub-four-minute mile. After winning gold at the 1956 Olympics, Chris went on to be the co-founder of the now iconic London Marathon. Having been voted best sports retailer by *Runners World* magazine for the last seven years, Sweatshop has built a tremendous base of loyal customers and membership throughout the United Kingdom. All Sweatshop full time staff undergo three levels of biomechanical training, based at Roehampton University in Surrey, examining all aspects of how our bodies move while running. They are so confident in their staff's ability to help customers find the perfect pair of running shoes that they offer an unprecedented guarantee to give customers 100% peace of mind—a service that is truly unique to Sweatshop.

Why they were included in the study:

Sweatshop created the Sweatshop Running Community (SRC) under the philosophy that running groups should be free, fun and for everyone – regardless of ability or experience. This inclusive attitude has helped the company build a community of nearly 14,000 members, and more than 2,000 that run with them on a weekly basis. Running can be a lonely activity, SRC's goal is to change that. They offer a variety of groups for all abilities and experiences. By joining the SRC, members receive guides on every run (so no one has to run alone), qualified staff to answer questions, mapped out running routes and incentives focused on participation. The more you run (participate), the more free benefits you receive. Participate in five activities and you will receive a free technical shirt, twenty-five activities earns you a nutrition pack and fifty activities (or nearly once a week for a year) and you earn a free pair of shoes.

Game Changer:

Sweatshop built a loyal member and customer base and became the largest sporting retailer in the country by offering free membership and rewards for participation. By making it accessible, fun and welcoming to runners of all skills and experiences, the company has broadened its base beyond the most seasoned runner. The results have been increased sales of its products, increased brand awareness and the creation of the largest running group in the country.

Whitney Museum of American Art (Whitney)

Based in New York City, the Whitney Museum of American Art is known for its range of twentieth-century and contemporary American art.

Why they were included in the study:

According to an artdaily.org article, the Whitney's Director of Membership & Annual Fund, Kristen Shepherd Denner, reported, "To our knowledge, the Whitney is the first museum to offer its members a chance to personalize their way of belonging to the institution" (Villarreal, 2010, para. 2). "Museum memberships are generally centered on demographics. By tapping into each individual's core values and allowing them to customize their benefits, we hope to deliver a membership that is meaningful to them personally and responds directly to their interests and needs. Our goal is to give members a richer, more rewarding experience at the Whitney and communicate with them in a more relevant way. We want their relationship with us to grow" (Villarreal, 2010, para. 2).

Game Changer:

The Museum invites prospective members to custom-design their membership through a "*Curate Your Own Membership*" program (Whitney Museum of American Art, 2013). The core benefits (and they do refer to them as "core") include unlimited admission, members-only viewing hours, a 20% discount on the museum store, and reciprocal admission to other art museums. The tagline alone says it all: "Customize your experience and maximize your benefits" What is unique about this model is that the Whitney does not pre-define members based on any one type of demographic. A social member could be a young professional or she could be someone nearing retirement. And, because benefits that are of high interest to one group may not be of interest to another, a member has the opportunity to customize or "curate" his or her membership to fit individual interests.

Appendix A – Participating Associations At-A-Glance

	# of Members	Membership Model	Game Changer	Results
American Institute of CPAs (AICPA)	394,000 members, including students, public practice, government, education, industry and consulting. Membership ↑	Regular member (partner, sole practitioner, staff) Business (President, Senior mgmt., staff) Education (Admin, professor), Government, Associate Membership, Affiliate Membership, Membership Sections (add-ons), International Credentials	Improved internal process, created more targeted marketing, increased frequency of appeals and calls	Improved communications, promoted member value, resulted in higher retention rates and overall increase in membership.
AIGA The professional association for design	23,000 designers. About half are students. Members are design advocates. Membership →	Created an entry-level dues category that is open to everyone regardless of experience. The higher the fee, the more benefits delivered. (See Appendix B)	Expanded membership to be more inclusive. Select membership based on needs & interests rather than demographics	Doubled the number of chapters to 67. Increased value at local level. Goal is to nearly double membership by 2014.
HDI	120,000 members 600 corporations 250 nonprofit partners Membership ↑	Individual, team, chapter only, print only membership categories. Created membership categories designed to meet employers' and employees' needs.	New membership categories, names and fees focused on attracting YPs and high level donors	Increased engagement at the chapter level, slight growth in membership. Hope to achieve higher retention rates.
Health Information & Management Systems Society (HIMSS)	52,000 members Membership ↑	Created membership categories for Individual, group membership, affiliate membership	Removed barriers to expansion, focused on ways to engage everyone involved in advancing their mission.	Significant membership growth. Expansion into c-level management within healthcare systems.
Indiana University Alumni Association (IUAA)	58,000 members Membership ↑	No changes in the membership model. Single and Joint memberships. 1-2-3 year memberships. Life membership paid monthly over 12 months	Highly targeted, better experiences to engage members and move them up the donation and involvement ladder.	Use of propensity models to target those likely to join resulted in increase in membership and higher ROI.
Massachusetts Medical Society (MMS)	24,074 physicians and medical students Membership ↑	See Appendix B. Group discounts and multi-year discounts based on participation.	Early adopter of organizational membership for physician employees. Small groups and solo get same discount with multi year commitment.	Slight increase in membership, higher engagement, increased registrations to MMS programs.
Rotary International (RI)	1.2 million members Membership →	Satellite clubs, associate members and flexible club requirement	Engaging young professionals through new engagement model	New efforts encourage fun, dynamic experiences – Changed perceptions of Rotary
Whitney Museum of American Art	N/A	Membership options based on interests	Benefits focused on interests, not demographics	See Appendix B

↑ Increase in membership

→ No change in membership

Appendix B – Sample Membership Structures

1. AICPA Membership Program

Regular Membership <ul style="list-style-type: none"> - \$415 Partner - \$415 Sole Practitioner - \$225 Staff
Business and Industry <ul style="list-style-type: none"> - \$405 President/CEO/CFO/Officer - \$225 Financial/Accounting Management/Staff/Auditor
Education <ul style="list-style-type: none"> - \$225 Administration - \$225 Professor/Teacher
Government <ul style="list-style-type: none"> - \$225 International/Federal/State/Local
Association Membership (Non-Voting) <ul style="list-style-type: none"> - \$220 Associate - \$395 International Associate - \$220 Non-CPA Associate
Affiliate Membership (Non-Voting) <ul style="list-style-type: none"> - \$50 CPA Exam Candidate Affiliate - Free Student Affiliate
Membership Sections (Voluntary) \$175 - \$205
Credentials (ABV, CFF, CITP, PFS) \$360
Designation (CGMA) \$100
Retired Members \$110
Temporarily Left the Workforce \$110

2. AIGA Membership Categories

	Trustee \$2500/year \$209/month	Design Leader \$500/year \$42/month	Sustaining Member \$250/year \$21/month	Supporter \$150/year \$13/month	Contributor \$50/year
Benefits					
Full member profile on AIGA.org	●	●	●	●	●
Access to members-only content on AIGA.org	●	●	●	●	●
Behance portfolio in AIGA network	●	●	●	●	●
Access to Design Jobs listings	●	●	●	●	●
Discounts on events and competitions	●	●	●	●	●
Receive membership card	●	●	●	●	
Partner discounts on software, images, etc.	●	●	●	●	
Apply to be a Design Envy curator	●	●	●	●	
Contribute stories to AIGA.org	●	●	●	●	
May serve on chapter board of directors	●	●	●	●	
Health insurance discounts	●	●	●	●	
Ethics and professional standards guide	●	●	●		
Discounted rates to post on Design Jobs	●	●	●		
Vote on national issues	●	●	●		
Receive print announcements	●	●	●		
Recognized for your contribution on AIGA.org	●	●			
Recommended level for national board members	●				
Dinner for two with an AIGA Medalist	●				

3. HDI Membership Program

Leadership Connection: A top-of-the-line membership, bringing together an elite group of senior-level professionals who meet face-to-face multiple times per year. (\$4,500 - \$6,500 per year)

Team Package: A value-packed membership experience exclusively designed for you and your team, offering the most bang for your budget! (\$1,995 per year)

Professional Plus: Join at the Professional Plus level and your workplace can reap the rewards of some of the perks of HDI membership! (\$795 per year)

Professional: Get all the benefits of the Resources level and grow your career with the ultimate professional development library. (\$495 per year)

Resources: Gain access to all of the latest industry resources online and attend local chapter meetings to meet your peers. (\$165 per year)

Local Chapter: A place to find out who's who in the local support community, giving you access to local chapter meetings and face-to-face opportunities with your peers. (\$75 per year)

Student: An outstanding value for actively enrolled students looking to expand their industry involvement and get a jump-start on their careers. (\$35 per year)

Print Package: Resources members and above, if you want to receive printed copies of the HDI Support Center Practices & Salary Report, HDI Desktop Support Practices & Salary Report, and SupportWorld magazine (six issues per year), don't forget to add the Print Package to your membership. (\$95 per year domestic, \$155 per year international)

4. HIMSS Membership Programs

HIMSS Individual Membership

	Online Only	Chapter Only	Regular (includes one chapter)	Student
	\$30	\$30	\$160	\$30
Chapter events, website, news		X	X	X
Volunteering		Chapter only	X	X
Discounts to educational events		Chapter only	X	X
Discounts on JobMine and CPHIMS exams			X	X
Publications and industry news	X	Chapter affiliated resources only	X	X
Tools and resources	X	Chapter affiliated resources only	X	X

HIMSS Organizational Affiliate Membership

	Associate	Pioneer	Principal	Executive
Dues	\$3,175	\$5,275	\$8,975	\$13,675
Education	2 Comp registrations to Annual Conference Unlimited registrations to virtual conference 10 seats to eLearning Academy	4 Comp registrations to Annual Conference Unlimited registrations to virtual conference 15 seats to eLearning Academy	8 Comp registrations to Annual Conference Unlimited registrations to virtual conference 30 seats to eLearning Academy	12 Comp registrations to Annual Conference Unlimited registrations to virtual conference 45 seats to eLearning Academy
Membership	Unlimited individual membership and chapter membership	Unlimited individual membership and chapter membership	Unlimited individual membership and chapter membership	Unlimited individual membership and chapter membership
Discounts on JobMine and CPHIMS exams	10 – 20%	10 – 20%	10 – 20%	10 – 20%
HIMSS Analytics Product Discounts	3%	3%	5%	7%

5. Massachusetts Medical Society – Group Membership Program

Groups of five or more physicians are eligible to receive the following discounts:

- 100% participation, 30% discount
- 90% participation, 20% discount
- 80% participation, 10% discount
- 75% participation, 5% discount

Solo practitioners or physicians in groups with fewer than five members can enjoy the same percentage discounts available through group enrollment and avoid the need to process MMS membership information on an annual basis by choosing from the following dues-saving multiyear options:

- 10-year membership, 30% discount
- 5-year membership, 20% discount
- 3-year membership, 10% discount
- 2-year membership, 5% discount

6. Whitney Museum of American Art Membership Program

The Whitney offers five different types of membership modules based on interests: *Social*, *Insider*, *Learning*, *Family* and *Philanthropy* (Whitney Museum of American Art, 2013). The fee for each module or series is \$40 and members may select as many series as they desire.

1. The *Social Membership* offers four passes to the summer cocktail reception to preview new exhibits, an invitation for two to the annual champagne reception for networking, ongoing invitations to cultural events through NYC including receptions, gallery openings and art fairs and two guest passes to entertain friends or colleagues.
2. The *Insider Membership* provides an invitation for two to a Behind-the-Scenes tour of the museum including normally restricted areas, exclusive presentations by curatorial staff and quarterly recommendations from curators and art insiders about other activities not to miss in NYC.
3. The *Learning Membership* offers invitations to lecture series, examines key issues in contemporary American art, invitations to gallery talks led by art historians, educational packets for major exhibitions to give special insight and advanced notice with preferred registration to all public programs.
4. The *Family Member* focuses on benefits for children including a Whitney Kids Passport, free admission to family programs, discounts on Stroller Tours when the Museum is closed to the public, Family guides for major exhibitions, complimentary guest passes for family caregivers and advance notice of all family programs.
5. The *Philanthropy Membership* does not provide any additional benefits but offers members the opportunity to provide additional, tax-deductible support for the Museum. In addition to the membership series, the Whitney offers patron groups designed to align members' interests with the Museum's mission. These groups, which range in price from \$2,500 to \$25,000, offer individuals the opportunity to enjoy unique experiences, while the Museum clearly has a great opportunity to raise additional revenue.