



TRANSPARENCY &
ACCOUNTABILITY
INITIATIVE

Strengthening Connections

Insights in member engagement from
collaborative organizations

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Report designed by TAI.

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Who We Are

OUR VISION

A more just, equitable, and inclusive world where people are informed and empowered, governments are open and responsive, and collective action advances the public good.

OUR MISSION

To strengthen the impact of TPA funding in support of inclusive and equitable development. We do that by developing learning infrastructure and facilitating collaboration to optimize funder practice and resources.

OUR VALUES DRIVE OUR WORK

- **We are committed** to acting with integrity, being transparent, and accountable.
- **We are curious and committed** to learning, experimentation, and evidence-based decision-making.
- **We recognize and respect power dynamics.** We always remember that it is grantees (civil society and government actors) who are doing the frontline work and we prioritize their voice, insights, and expertise to help guide our programming.
- **Collaboration is essential.** We want to be more than the sum of our parts.

Core Members



Associate Members



Introduction

The Transparency and Accountability Initiative (TAI) is a donor collaborative of the world's leading funders of transparency, participation, and accountability work. Upon analyzing our annual member survey and collaboration case note findings, we determined there was room for improvement in our member engagement practices. Seeking to improve, we interviewed 9 collaboratives to learn what is and is not working for them in terms of member engagement.

The collaboratives interviewed vary in size, sectoral focus and approach; some have hundreds of members versus less than ten, some are pooled funds, a few have deliberately limited public profiles, some are entirely dependent on member dues/grants while others relying on a mix of grants and income generating activities.

This document distills findings from the interviews across the following four themes (including TAI's experience where applicable):

- Individual Member Engagement
- Collective Member Communication
- Member Service Lines
- External Profile/Engagement

This document does not attempt to make recommendations or identify best practices, but hope that it does provide rich food for thought in shaping your collaborative's member engagement strategy.

The one consistent finding across all buckets was "it depends." Should you establish a member-only portal? It depends on your member interest and track record of engagement. Should you invest in external branding? It depends on your external profile strategy. How should you engage X member/funder? It depends on your engagement goals for that member/funder.

This document does not claim to offer definitive answers and is not exhaustive (but distills from over 40 pages of notes!). We have chosen not to list the organizations interviewed nor publicly attribute any findings, but should you be interested in learning more about a specific finding, TAI maintains a private, attributed version and will be happy to make connections should both parties be interested.

Should you have any questions or concerns on any material, [please contact us](#).

Individual Member Engagement

HEADLINES

- Using a point of contact
 - Either having a collaborative staff be the central point of contact between members and the collaborative
 - Or vice versa
 - Or a hybrid
- Maintain onboarding materials for new member staff
- Schedule one on one calls with new members/staff
- Varying on member interest, member count, and staff bandwidth, it was advised to have a one on one call with each member institution on some sort of recurring schedule (at least once annually) open to all interested member staff
- Establish a member engagement strategy and goals for each member's engagement
- Network with existing members to expand reach within their institutions
 - Similarly, target leadership at the members so subordinates become interested in the collaborative
 - Using LinkedIn and Member staff directories can help

POINTS OF CONTACT

There are two different meanings for 'point of contact' in this document. First is the collaborative having a member point of contact on collaborative staff, where all requests, emails, information to and from members is to flow through the collaborative point of contact to the rest of the collaborative staff.

Conversely, some collaboratives have member staff points of contact at member organizations, where news and information from the member flow through the member staff to the collaborative.

Some organizations use exclusively the first model while others rely on the second and one utilizes both models (this collaborative handily has a guide for member points of contact on communicating with the collaborative).

One concern heard on the second model is that member staff could inadvertently become a gate-keeper (or worse, a bottleneck) to the wider member organization and conversely the collaborative, while it may even be seen as a burden on the member staff.

ONBOARDING

Two collaboratives disclosed they maintain onboarding materials for new members, ranging from a short document to one collaborative considering producing a short video overview. This is more so important for new member staff than for new member organizations, as the organization likely knows much about the collaborative it is paying to join.

One collaborative explained that whenever they hear of a new member staff joining, they immediately attempt to schedule an introductory call. This allows the collaborative to gain valuable face time, discuss any benefits and services the collaborative offers that may not be readily apparent, and to answer any clarifying questions. Ultimately, this serves to build a stronger relationship with the member organization.

ENGAGEMENT WITH INDIVIDUAL MEMBERS

One on Ones in this document do not exclusively mean one collaborative staff and one member staff, although they can be. It was explained by several collaboratives that they use these scheduled times to invite all interested member staff. Frequency similarly ranged from once a quarter, semi-annually, and once a year.

Some collaboratives interviewed have over 100 members and so avoid regular one on one check-ins with individual members for practical reasons, although another large collaborative group does undertake annual half hour check-ins. Differences in collaborative staffing may allow for a dedicated member point of contact (see above), while others may simply share this engagement responsibility across multiple staff.

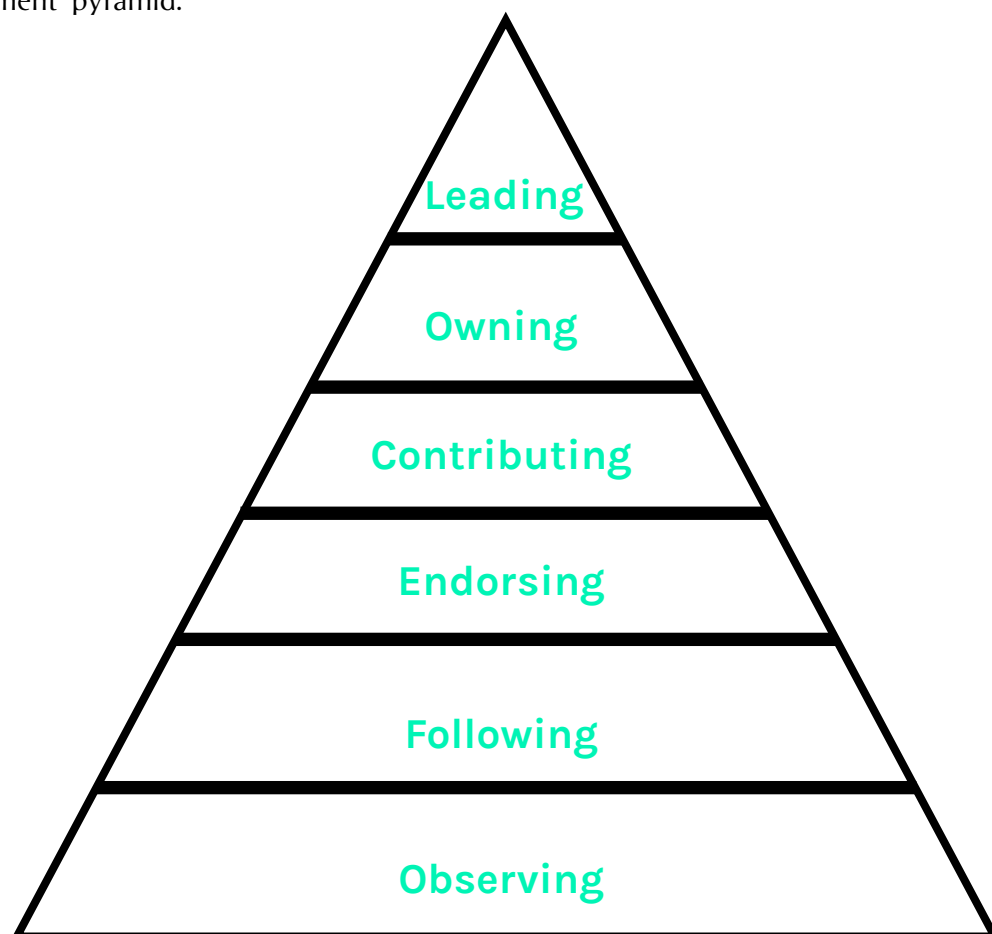
Similarly, interest among members to have such a one on one check-in may vary. One collaborative mentioned that some members want to meet for coffee once a year while others are sending and seeking information all the time.

NETWORK STRENGTHENING

Each collaborative we spoke to had different member/non-member participation goals. Some are large and established enough to the point where they will always have a varied audience on events and calls and do not need to create member engagement strategies. Others with smaller member counts do not attempt to solicit new members or non-member participation at all and wait to be approached. (These differences are discussed in more detail later in the Member Service Lines and External Profile/Engagement sections.)

However, one of [TAI's 2020-2024 strategy pillars](#) is to broaden the funder landscape in the transparency, participation and accountability space. This entails twin challenges of broadening engagement among existing members and building relationships with relevant non-member funders. At the same, member regulars continue with their regular demands on Secretariat resources.

It seems obvious on paper, but it is important to have a sense of the member participation you are looking for and how to get there with each member. One way we heard to address this was creating a membership engagement 'pyramid.'



This pyramid lists all funder members and organizes them by level of participation in the collaborative. This pyramid enabled the collaborative to identify which members they want more engagement with and facilitates designing a strategy to move that member further up the pyramid. Please read this [blog on Groundwire](#) for a more detailed overview of the pyramid levels.

Throughout our interviews, we heard the importance of networking to achieve member engagement goals; be it increased event participation, increased funding, or increased idea uptake.

Collaboratives seeking new participants or deeper engagement with members are encouraged to do old fashioned networking; identifying someone in your orbit and using an existing connection to bring that person into the fold.

We heard several strategies to help with networking. One interviewee mentioned using a member/organization staff directory to find new people to bring in and TAI has utilized LinkedIn to find new participants. Another explained how they wanted to speak to another Foundation team and requested a direct connection from the Foundation team they already engaged with.

Lastly, an interviewee explained they attempt to make connections and get 'buy-in' with an institution's leadership, thereby having the leader promote the collaborative internally with their team/subordinates. This same collaborative explained they hold events oriented specifically to institutional leadership.

Collective Member Communication

HEADLINES

- Only one collaborative maintained a member-only web portal, while others are considering it, and others rejected the idea
 - An alternative suggestion was creation of a private LinkedIn group, as that is an existing platform
- Member use of member-only listservs was low for all collaboratives, although some are reporting higher engagement after constant encouragement
- Change the sender email address from time to time on mass emails to potentially increase the open rate
- Member only newsletters are used by about half of interviewees, each with different content and distribution frequencies
- Only one collaborative used a customer relationship manager (CRM), NeonCRM

MEMBER ONLY PORTALS

Only one collaborative maintains a dedicated member only portal, although some others indicated they were thinking of creating one.

The collaborative with the membership portal explained member use is increasing and indeed there is a subset of member staff very active in the portal. However, this interviewee said member portals must be exceedingly clear in their purpose to justify the investment.

On the opposite side, a former funder member staff called it "a very 90s idea" and stressed that members wanted to be engaged as simply as possible. This same interviewee suggested that private LinkedIn Groups were much more conducive to member staff engagement as that is already a service they use. Another interviewee questioned the utility of a member portal – what more would it offer beyond existing mechanisms of communication (listservs, newsletters, etc.)?

LISTSERVS / NEWSLETTERS

Each interviewee maintains some form of member only listserv or newsletter.

Regarding listservs, the general finding across all interviews was that member engagement on them was low, that is to say, nearly all emails in the listserv are sent from the collaborative. Some collaboratives are noting an uptick in member engagement, but it is taking constant pushback when receiving emails from members to achieve this, e.g. “Thanks for this and we will send this out, but we encourage you to use X listserv.”

On newsletters, four collaboratives shared they had some sort of private, member only newsletter while one was attempting to make the case internally for one. Content in the newsletters differed as well; one used them to spotlight member work, another formats the letter more like an update, sharing their analyses of recent news, one shares news, events, and uses it as an opportunity to share new reports.

Frequency varied as well; every few weeks, monthly, quarterly, and semi-annually. TAI has a member only newsletter, the Monthly, that primarily recaps Secretariat activities, flags events TAI is hosting and participating in, and reminds readers of critical member updates.

USE OF CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SOFTWARE

Only one collaborative mentioned using a CRM, via Neon CRM. It offers a space for members to buy event tickets, share their funder interests, pay membership dues, and identify other member staff they'd like to connect with.

Member Service Lines

HEADLINES

- Levels of collaborative support in working groups and event facilitation vary wildly
 - Some have standardized event submission forms, some promote via listservs, some handle all aspects, others simply send a calendar invite
- Utilizing meeting tools like Jamboard and Miro *can* (but it is not guaranteed to) detract from a trusting atmosphere
- Establish participation goals for all events/calls
- All collaboratives offer some sort of personalized member support based on member interest, though we heard only one collaborative (other than TAI) has an explicit service line for it

COLLABORATIVES' ROLES IN FACILITATING EVENTS AND WORKING GROUPS

What role do collaboratives play in facilitating events/working groups with members?

This varies from working with members to design an agenda, finding participants, organizing logistics, and facilitating the calls, to simply providing a Zoom link for the working group to meet. Even some of the larger collaboratives interviewed with over 100 members did a mix of both, depending on bandwidth. One collaborative mentioned however, that member ownership is key. Another similarly emphasized member co-creation around their annual member events.

One collaborative had a streamlined process for members to pitch ideas for events/working groups for the collaborative to support. Members complete a form online indicating the date of the proposed event, the topic, and who would speak. The Collaborative then follows up with an agenda template – what are the discussion points, how long will each segment run – and then creates a calendar invite to be distributed through an events listserv. Importantly, the member who proposed the event must write a blog covering the discussion points.

MEMBER ATTENDANCE AND PARTICIPATION IN EVENTS / WORKING GROUPS

For any event to be successful, it must have participants. Due to some collaboratives' high member count, a variety of different members will always show up for events and working groups, thus there isn't an inherent need to do much event promotion. Other groups with smaller member counts sometimes have to do targeted, personalized outreach to boost attendance (recall the Network Strengthening section).

Getting people into the room is only half of the equation. Referring back to the idea of having participation goals, the collaborative with the ‘engagement pyramid’ noted they were after ‘deep participation’ instead of ‘high participation.’ That is to say, are the right people in the room? Are they advancing knowledge understanding? Is there a clear understanding on the collaborative is bringing these specific people together?

Facilitating a safe and trusting atmosphere was also said to be essential to successful member participation. One collaborative noted that their members preferred simpler conversations and the “accoutrements” like Jamboard, Miro, Google Docs etc, detract from that trusting atmosphere. Another collaborative had a similar sentiment (though focused on member growth) “grow at the pace of trust.”

TYPES OF MEMBER EVENTS

We heard three different buckets of events offered to members (in addition to more public facing events): member updates, learning sessions, and annual meetings.

Member updates give the space for members to share their news, reports, programming decisions etc. The level of formality of these groups varies between collaboratives, with one collaborative doing specific member update sessions three times per year.

Most collaboratives offer learning sessions. Although format and terminology vary by collaborative, these all tend to be geared to offer members insights on a specific topic. This can simply be providing a standing meeting for members to discuss an issue, reflecting on commissioned research or generated analysis, or bringing in relevant experts to speak about an issue with members.

PERSONALIZED MEMBER SUPPORT

In the interviews, TAI gained the impression that all collaboratives provide some sort of research or connection support to members, ranging from doing a quick research scan, news analysis, reviewing a proposal etc. However, only one collaborative (other than TAI) has named this service and another collaborative only gives this support to members in a higher paid tier of membership.

CENTRAL INTELLIGENCE HUB

We asked interviewees if they are looking to be a sort of central funder intelligence hub for members in their sector and if they are, how did they get there? TAI wants it to be instinctual for members to share relevant news and information with the Secretariat so we can share with our wider network as appropriate. Several were trying to solve this problem themselves, one collaborative said it depends on member interest, and two said they were large and established enough to that this happens without effort.

One interviewee said that for collaboratives to achieve this, it needs to put itself ‘out there’ with the members. This aligns with the advice for driving up member engagement on listservs – a suggestion to constantly remind members that this service exists.

External Profile/Engagement

HEADLINES

- Collaborative external profile goals vary
 - Some are deliberately flying under the radar, some trying to establish a brand, others are established
 - Determine your external engagement goals
- External profile goals predictably influence other things, like blog posting, social media, website design
 - There are funder groups with a savvy social media presence that others can learn from
 - Suggested to post blogs on existing, larger readership sites/outlets

RAISING A COLLABORATIVE’S PROFILE - TO DO OR NOT TO DO?

As stated at the top, the answer to the question of “Should my collaborative should cultivate an external profile?” is “it depends.” Some collaboratives put in effort to fly under the radar – employing minimalist websites, doing zero publications, no social media, and one even turning down interview requests. However, that is not to say these collaboratives do not attract new members. Far from it, as one gained six new funders in 2020 without any solicitation.

Others still are trying to determine or reconfigure their external profile goals. Some collaboratives have low website traffic and are grappling with the idea of investing more money into website modifications.

One collaborative, attempting to gain more members and partners, said they were going to redesign their entire website to be a pitch to join their collaborative.

The lesson here is that there is no right or wrong answer maintaining an external profile but rather to determine what matches with your collaborative’s goals and importantly, staff bandwidth.

BLOGS AND SOCIAL-MEDIA

For those looking to expand their public profile, we heard that unless you already have an active

website and are well-known in the field, it isn't worth publishing blogs on your own site. In TAI's case, we noticed readership of our blogs and web traffic was low. We decided to take a different approach and started having blogs hosted externally, like on the Center for Effective Philanthropy. Comparing TAI blogs hosted at CEP and blogs hosted on TAI's website, the blog on CEP had far more views than on TAI's site.

One collaborative discouraged blogs all together as everyone was too exhausted doing everything else in 2020 to have time to read another blog. The alternative suggested was to create a podcast – that way, users could listen to the 'blog' while driving the car, cooking dinner, or taking care of their children. This approach could also be applied to simply recording the audio of events and that being a podcast. However, a different collaborative explained their podcast wasn't gaining much traction.

On social-media, one interviewee stated "Facebook is for Boomers." Several interviewees said LinkedIn was their most successful social media page. For collaboratives looking to target the youth, Instagram was touted as the place to be. One interviewee said that Mama Cash and Frida Fund had the best social media in town.

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