COVID-19 Association Pulse Survey Results

How COVID-19 Has Impacted Member Organizations & Lessons Learned
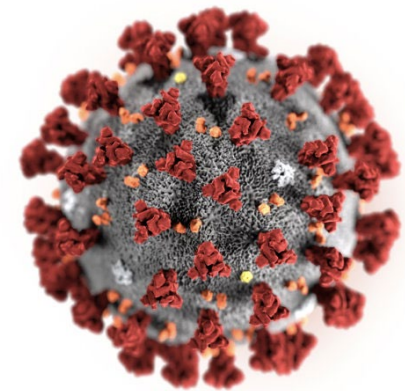
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Background & Methodology

Goal:

▶ **ORI** partnered with **Higher Logic** and **Association Analytics** with the goal of allowing association staff and executives to share their COVID-19 experiences and learn from others.

Survey Method:

▶ Because our post-COVID-19 world is so unprecedented, standard survey techniques may miss key insights or industry responses by asking narrowly focused, closed-ended questions. As a result, we focused on asking **open-ended questions** to allow respondents to **share their voices organically**.

- Online survey with 229 respondents

- 5 open-ended questions (see appendix for precise questions)

- 5 closed-ended questions (see appendix for precise questions)

Analysis:

▶ ORI used Clarabridge's **AI-driven text analytics** technology to mine unstructured data for **themes, sentiment, and effort**—and then combined this with structured data to allow for segmentation.

What Are Sentiment & Effort?

▶ **What is sentiment?**

- Sentiment is a score derived from text using AI-powered technology that captures **how a respondent feels about what they are talking about**.

- Sentiment is scored on an **11-point scale from 👎 -5 to +5 👍** , which allows analysis to consider degree of negativity and positivity.

▶ **What is effort?**

- Like sentiment, effort is a score derived from text using AI-powered technology. Effort scores capture **whether it was difficult or easy to do or deal with the theme a respondent is talking about**.

- Effort is also scored on an **11-point scale from ⊋ -5 to +5 ⋐** .

- Effort is often a **leading indicator of satisfaction**.

▶ In this report, **negative sentiment** and **high effort** should be understood as **indicating causes of difficulty and frustration in response to COVID-19**. Conversely, positive sentiment and low effort highlight those topics that generated positive responses and a sense of ease related to the COVID-19 pandemic.

Executive Summary of Key Findings

Technology Made It Possible

▶ Although numerous platforms for remote work existed before COVID-19, the quarantine and restrictions on gatherings **accelerated their adoption** among association staff and/or led to **increased use**.

▶ Many organizations already had a virtual office framework—and those that did not adapted quickly.

- Overall, respondents reported increased use of **video conferencing, email, and social media**.

- Respondents were also surprised at the **speed** and relative **ease** with which their organizations pivoted to remote work.

▶ However, there were differences among associations, with respondents from **smaller associations** reporting increased engagement via **social media** and respondents from **medium associations** reporting increased use of **Slack, Microsoft Teams, and chat**.

▶ As members both shifted to remote work and found themselves in need of advice and support, **online forums** offered a way to **connect with one another**, **share insights** from their experiences, and **engage with the association**.

Proving Flexibility Through Quick & Ready Adaptation

▶ At the same time staff remained quarantined at home, association **activities of all kinds continued in the virtual world**:

- In-person conferences have been cancelled and re-planned as **virtual events**.

- Content previously offered in-person has been converted to **webinars**.

- Committee and board meetings are being hosted in **virtual meeting rooms**.

▶ Associations also altered the **content** they provide to members in a variety of ways.

- Many see an opportunity to be a source of **reliable COVID-related industry news** for their members.

- Others are offering **low or no cost educational materials** to members.

Mixed Responses Regarding Remote Work

The COVID-19 pandemic required a paradigm shift in the way most association staff work, with quarantines and bans on large gatherings forcing many to transition to remote work.

▶ For many, working at home has proven surprisingly **effective and productive**. Experiencing the continued productivity of their organizations—from home—has been an eye-opening experience.

▶ Others have found that working from home presents **challenges in work-life balance** as they struggle to **manage children, spouses, pets**, and their needs while working or maintaining a delineation between **work and non-work time**.

▶ Others mentioned **difficulty in remaining connected** as well as the **benefits of social interaction and in-person collaboration**.

Respondent Demographic Overview

Association Size By Revenue

35% of respondents' organizations had annual budgets of **$2 million – $10 million**, with the largest segment being those with an annual budget between **$2 million and $5 million** (19%).

Less than $1 mil: 10.5%

$2 -$5 mil: 18.8%

$20+ mil: 10.5%

$5-$10 mil: 16.2%

$10-$20 mil: 11.8%

$1-$2 mil: 13.5%
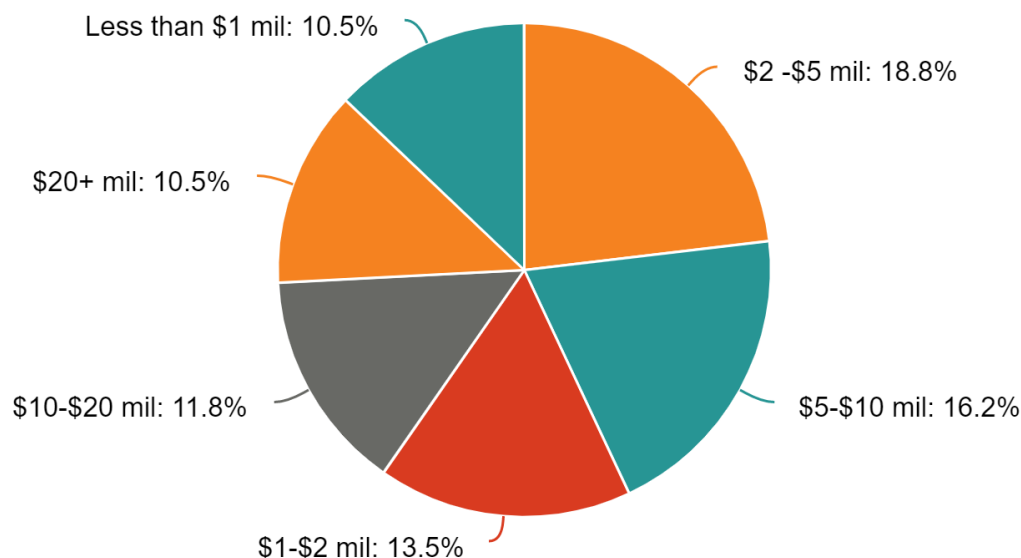
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n= 229

Membership Organization Type

The largest organizational type respondent group was **individual-based membership organizations** (36%), followed by hybrid (23%) and organization-based (21%), respectively.

- individual-based membership organization
- hybrid of individual- and organization-based organization
- organization-based membership organization
- association management firm
- charity
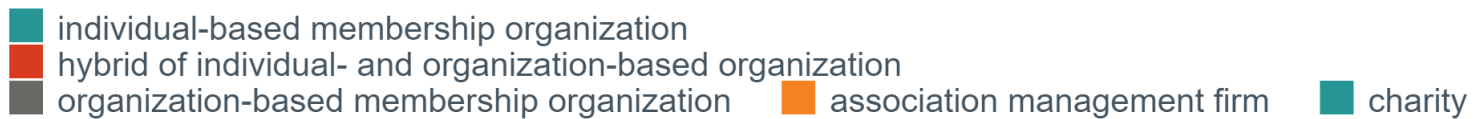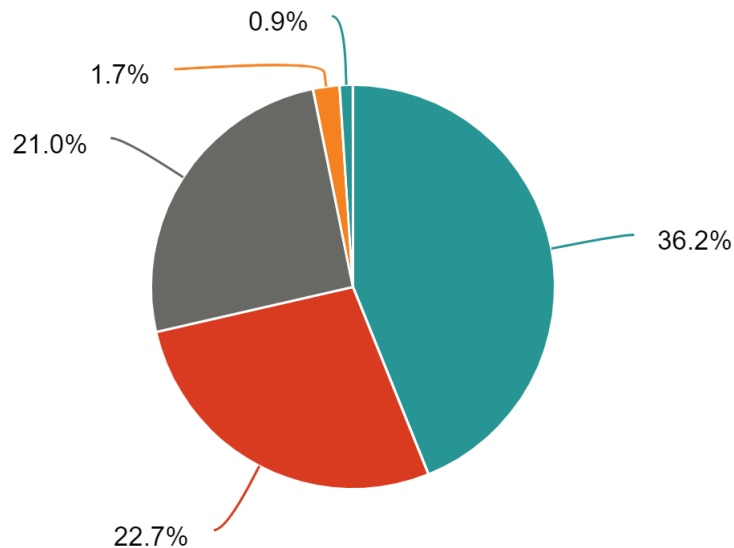
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n= 229

Events: In-Person to Virtual/Hybrid

Only **9%** of respondents **had not and were not planning to move any in-person events to virtual**. *(This does not include those who did not respond or for whom the question did not apply.)*
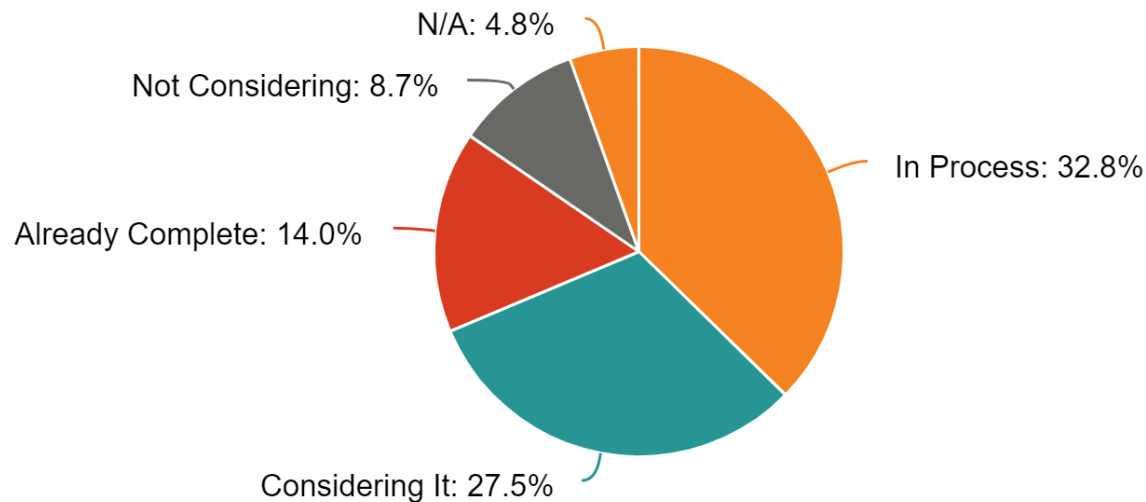
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n= 229

Organizational Responses

What has your association done in response to COVID-19?

Organizational Actions in Response to COVID-19

▶ Every association survey respondent reported some response to the COVID-19 pandemic. The most common response was to **cancel in-person events** (82%).

▶ Meanwhile **73%** of respondents reported **developing new products or services** and **72%** reported **replacing in-person events with virtual events**.

▶ Only **7%** of respondents reported that their organizations **reduced the number of employees** and **4%** reported **reduced membership dues**.

Organization Responses to COVID-19	
Cancelled In-Person Events	82%
Developed New Products or Services	73%
Replaced In-Person Events with Virtual Events	72%
Postponed In-Person Events	53%
Created Forums for Virtual Events	48%
Delayed Membership Dues Collection	32%
Other	14%
Reduced the Number of Employees	7%
Reduced Membership Dues	4%

N=229

Offering Low/No Cost Education

Offered Low/No Cost Education

Provided News, Updates, and Information

Switched to Virtual/Hybrid Events

Adjusted Dues Strategy

Created of Forums for Peer Sharing

Cancelled Events

Reduced Staff Pay/Benefits

Launched Online Community

Surveyed Members

Started Charitable Initiatives

0.0%   10.0%   20.0%   30.0%
% Total

Powered by Clarabridge   n= 50

In addition to the responses listed, respondents were able to enter **"other"** ways their organizations had responded to COVID-19 (14% of respondents). Analyzing the verbatim text showed that **offering low/no cost education** made up 24% of "other" responses.
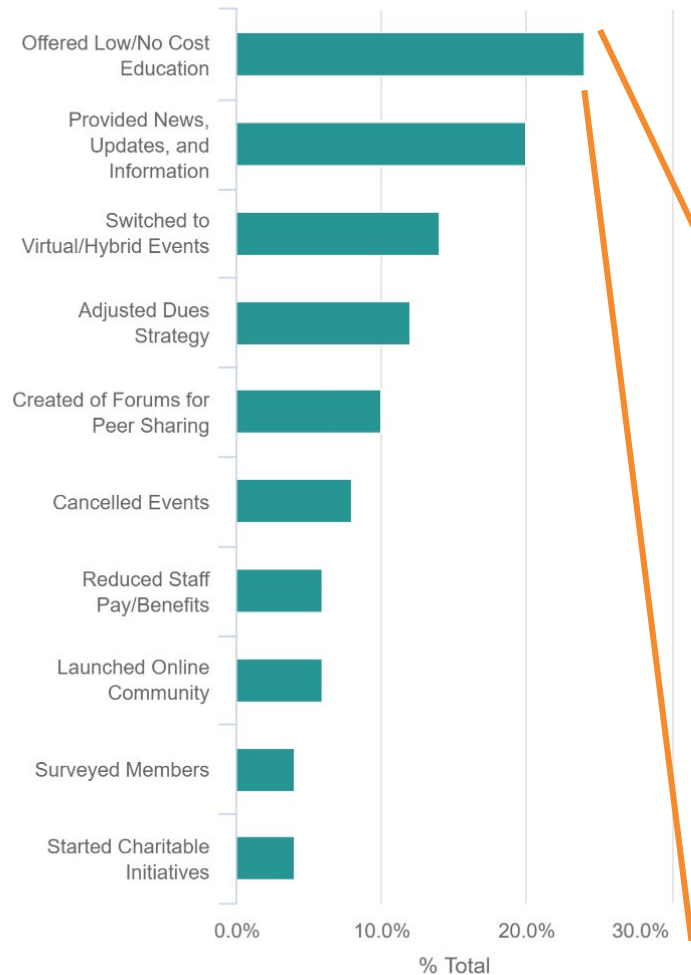
* Providing 20 free CPE credits for members (we were going to implement that next year, but pushed it up to this year) * Providing

Gave our members 3 months of unlimited e-learning through our Learning Pass.

Reduced registration costs for some education or made it free.

Created a COVID-19

Powered by Clarabridge   n= 12

Offered Low/No Cost Education

Provided News, Updates, and Information

Switched to Virtual/Hybrid Events

Adjusted Dues Strategy

Created of Forums for Peer Sharing

Cancelled Events

Reduced Staff Pay/Benefits

Launched Online Community

Surveyed Members

Started Charitable Initiatives

% Total

0.0%   10.0%   20.0%   30.0%

Powered by Clarabridge   n= 50

Provided industry resources

e, 3-month dues options employees take a 20% pay cut,

Exchanging best practices for crisis management to compile and distribute to the members.

Shortened time to publication for COVID related STEM articles

Created COVID-19

Powered by Clarabridge   n= 10
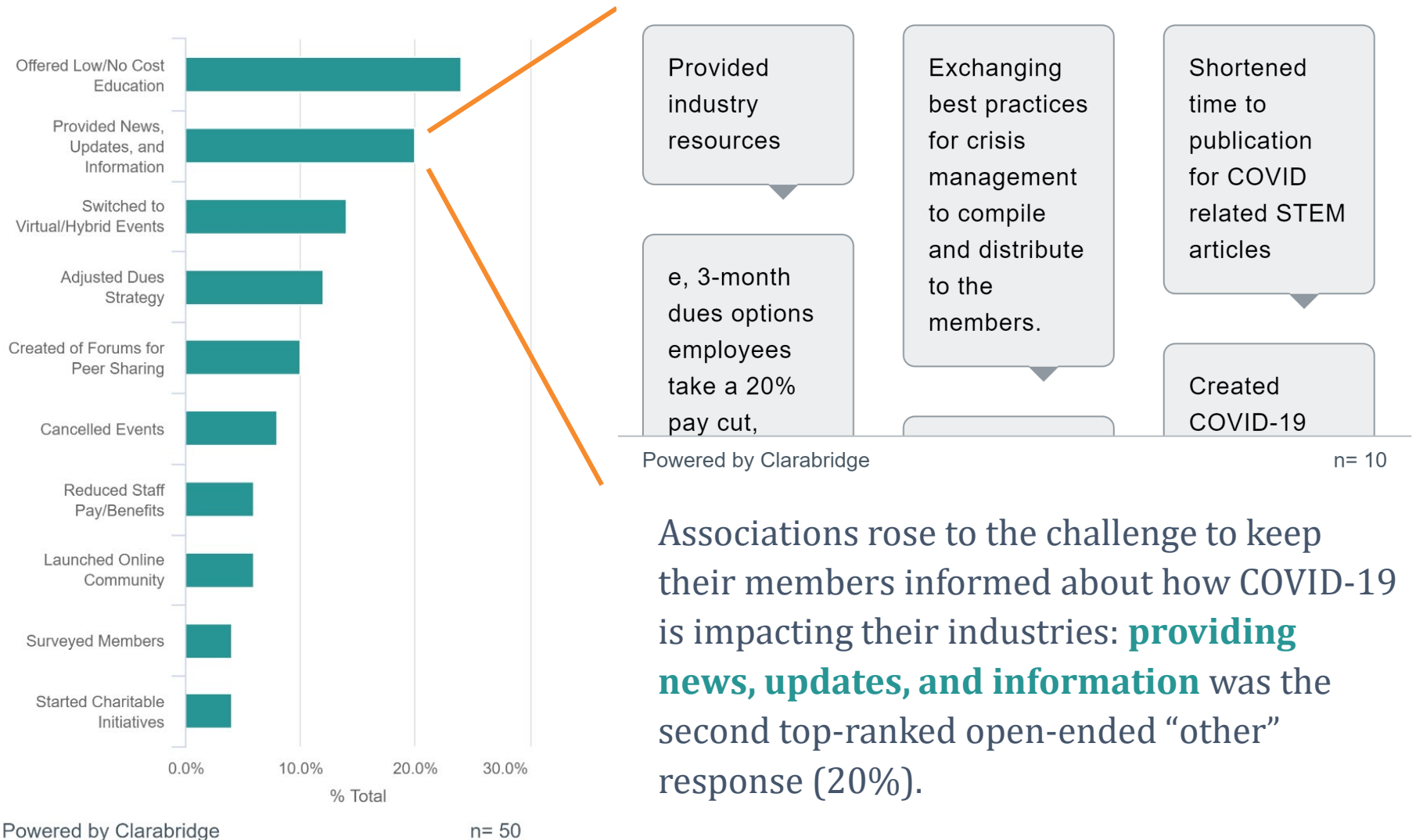
Associations rose to the challenge to keep their members informed about how COVID-19 is impacting their industries: **providing news, updates, and information** was the second top-ranked open-ended "other" response (20%).

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Surprising Responses to COVID-19

What aspect of how you have responded to the COVID-19 pandemic has surprised you the most?

Surprise at Response & Transition to Remote Work

Approximately **31%** of respondents were surprised by topics related to **working from home**. Of those commenting on working from home, approximately **60%** discussed their **productivity and morale**.
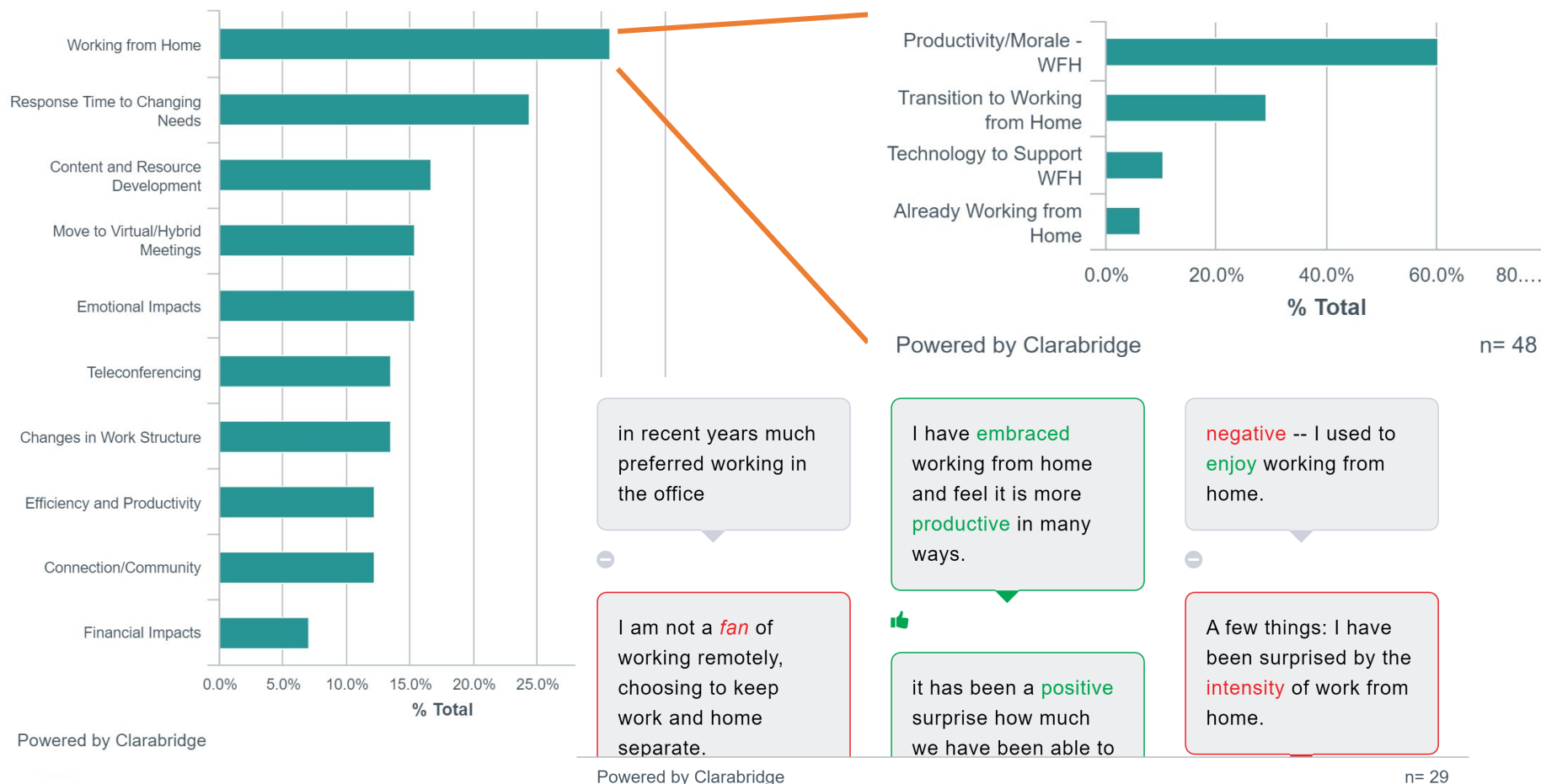

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n= 48

Powered by Clarabridge

in recent years much preferred working in the office

I am not a *fan* of working remotely, choosing to keep work and home separate.

I have embraced working from home and feel it is more productive in many ways.

it has been a positive surprise how much we have been able to

negative -- I used to enjoy working from home.

A few things: I have been surprised by the intensity of work from home.

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n= 29

Mixed Reactions to Remote Work

Although working from home was one of the top topics that respondents commented on, they had **mixed sentiment** regarding their new arrangements. Many commented on how **effective and productive** it was, while others found it challenging to find **work-life balance**.

work from home is going *better* than expected, performance remains high, outcomes are solid.

I have embraced working from home and feel it is more productive in many ways.

I am pleasantly surprised with the effectiveness of my entire staff working from home.

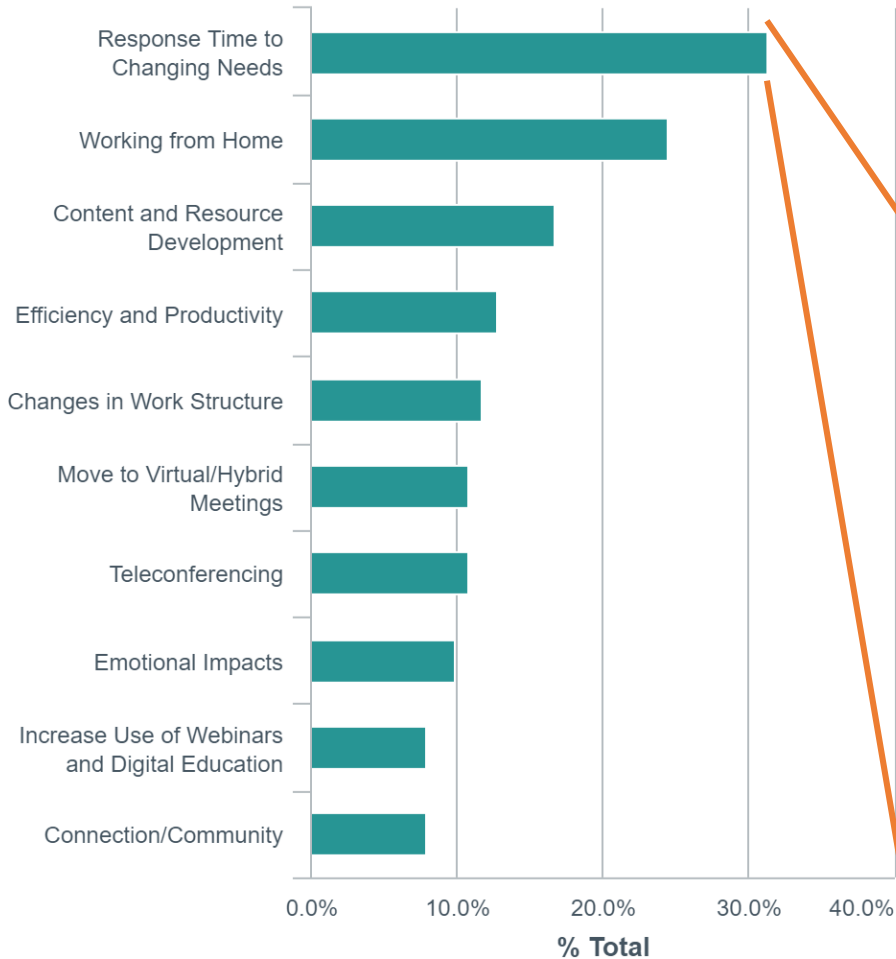I am not a *fan* of working remotely, choosing to keep work and home separate.

Working from home with two small children has been extremely challenging.

A few things: I have been surprised by the intensity of work from home.

Positive Surprise at Responding to Changing Needs

Chart: % Total (n= 102)

Category	
Response Time to Changing Needs	~31%
Working from Home	~24%
Content and Resource Development	~16%
Efficiency and Productivity	~12%
Changes in Work Structure	~11%
Move to Virtual/Hybrid Meetings	~10%
Teleconferencing	~10%
Emotional Impacts	~9%
Increase Use of Webinars and Digital Education	~8%
Connection/Community	~8%

Powered by Clarabridge   n= 102

The top **positive sentiment driver** was **response time to changing needs** (24%) and how rapidly associations were able to adapt.

I have been happy to see how quickly our staff and members seem to have adjusted to a complete overhaul in how we do business. 👍

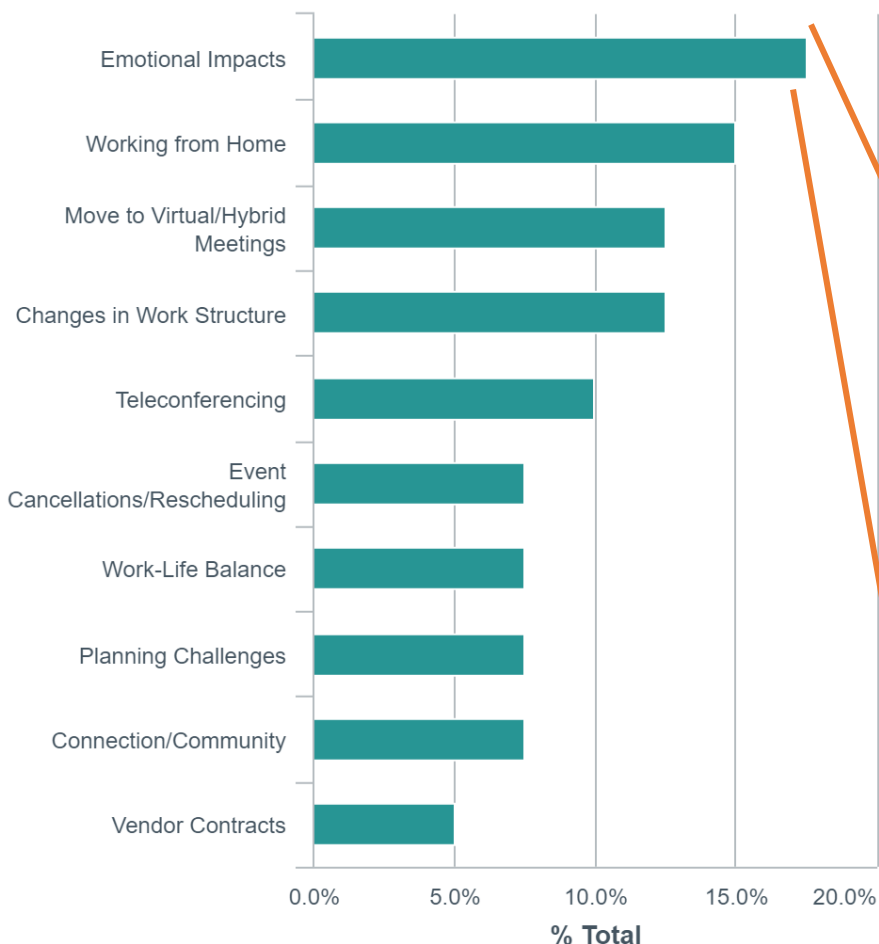I have been pleasantly surprised at how quickly we were able to convert some content intended for our in-person event in March to virtual content. 👍

We have implemented new programs much quicker than we would have in the past 👍

Two positives: 1) our ability to quickly respond to member need for content with a daily microwebinar- 10 minutes of relevant, timely, COVID-19 related information and 2) our ability

n= 32

Negative Surprise About Emotional Impacts of COVID-19 & Remote Work

Emotional Impacts
Working from Home
Move to Virtual/Hybrid Meetings
Changes in Work Structure
Teleconferencing
Event Cancellations/Rescheduling
Work-Life Balance
Planning Challenges
Connection/Community
Vendor Contracts

0.0%   5.0%   10.0%   15.0%   20.0%

% Total

Powered by Clarabridge   n= 40

The **emotional impacts** of the pandemic (18% of comments containing negative sentiment), followed by **working from home** (15% of comments containing negative sentiment), were the top two **negative sentiment drivers**.

Surprising to keep feeling so uncertain and unsettled about the situation.

I am surprised at how much I feel *like* work has invaded my home (safe) space.

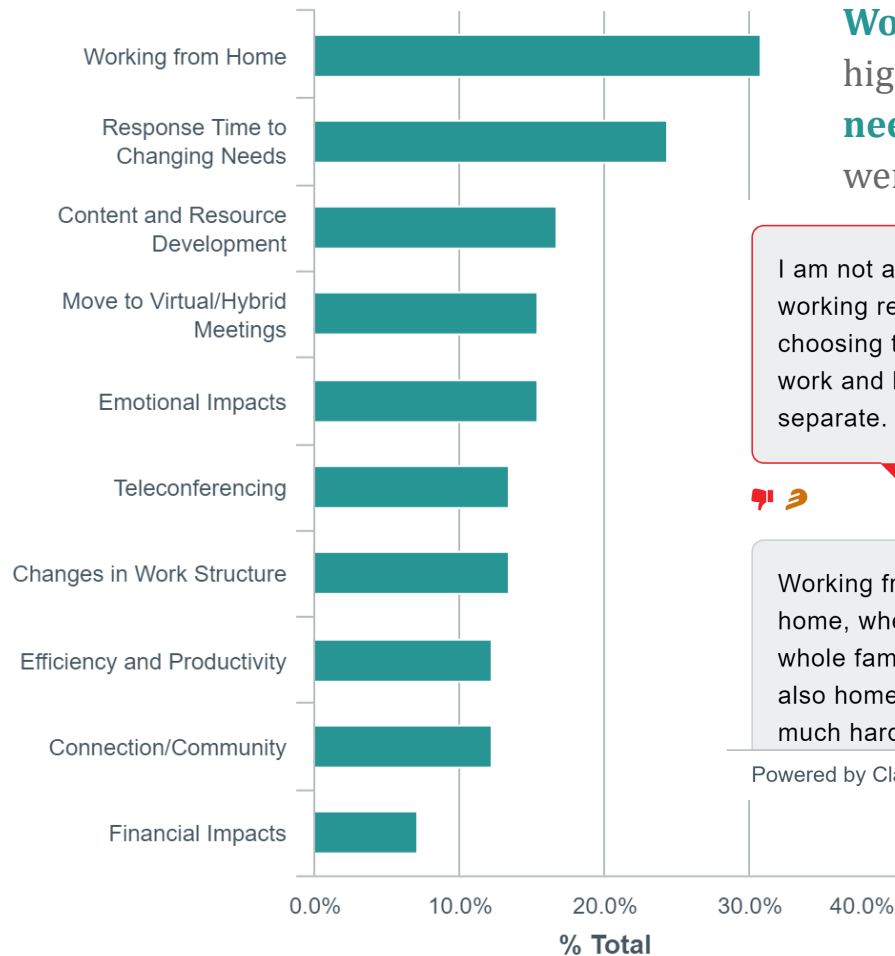As a director as well, I have been concerned with employee morale, especially in light of hour/pay reductions.

I really miss seeing my grandkids and traveling.

I suppose what has 'surprised' me the most, so to speak, is the anxiety I have experienced as a result of being 'on house arrest,' and specifically from the strange combination of working from my apartment all day without being able to

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Remote Work Elicits High-Effort Commentary

Working from Home chart

Categories (top to bottom):
- Working from Home
- Response Time to Changing Needs
- Content and Resource Development
- Move to Virtual/Hybrid Meetings
- Emotional Impacts
- Teleconferencing
- Changes in Work Structure
- Efficiency and Productivity
- Connection/Community
- Financial Impacts

X-axis: **% Total** — 0.0%, 10.0%, 20.0%, 30.0%, 40.0%

Powered by Clarabridge   n= 156

Working from home (27% of comments containing high-effort feedback) and **response time to changing needs** (18% of comments containing high-effort feedback) were the top drivers of high effort among respondents.

> I am not a *fan* of working remotely, choosing to keep work and home separate.

> We were prepared to work at home and accelerate what we do to support our members.

> Previous assumptions about individual commitment to productivity when working from home have been proven wrong.

> Working from home, when the whole family is also home, is much harder than

> Working from home with two small children has been

> Surprise to learn how mobile we

Powered by Clarabridge   n= 8

Effort is a score derived from text using Clarabridge's AI-powered technology. Effort scores capture whether it was difficult or easy to do or deal with the mentioned theme, thereby highlighting where respondents struggled and found success.
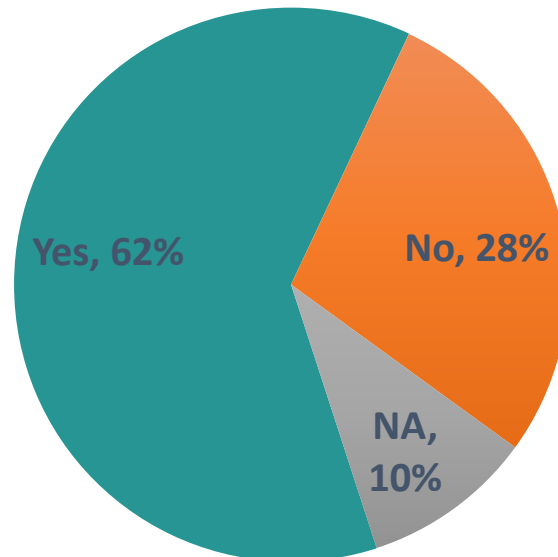
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Online Forum Use & Value

**How has the use or value of online forums changed
for your organization since the emergence of COVID-19?**
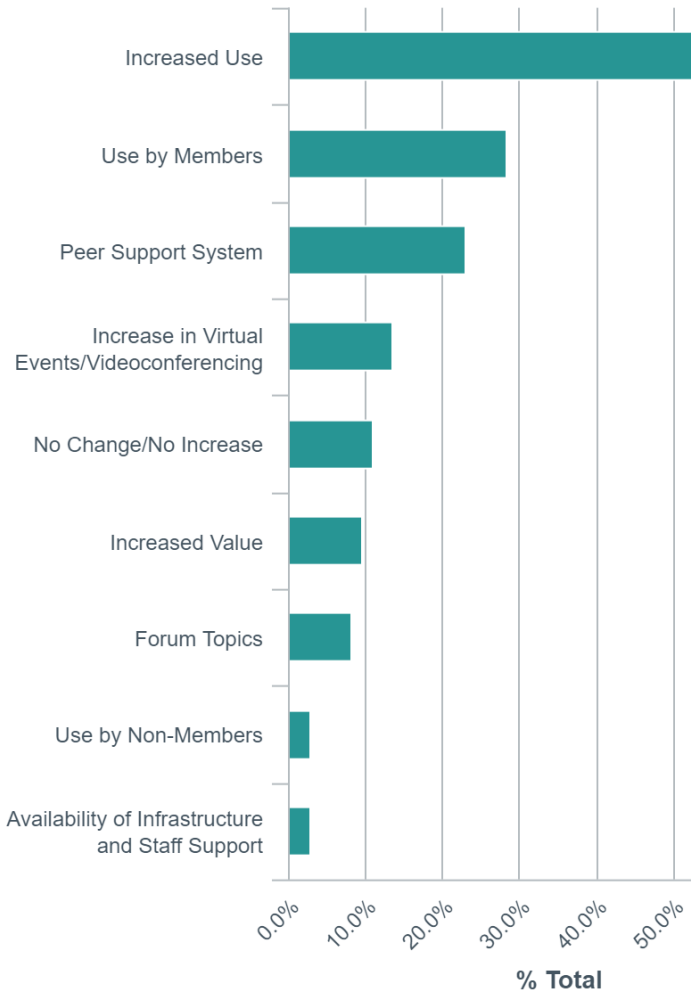
Prevalence of Online Forums

62% of respondents indicated that their organizations **have an online forum**, while 28% reported that their organizations do not use an online forum.

Yes, 62%

No, 28%

NA, 10%

Powered by Clarabridge

n= 229

Increased Use

Use by Members

Peer Support System

Increase in Virtual Events/Videoconferencing

No Change/No Increase

Increased Value

Forum Topics

Use by Non-Members

Availability of Infrastructure and Staff Support

0.0% 10.0% 20.0% 30.0% 40.0% 50.0%

% Total

Powered by Clarabridge

n= 74

In response to the COVID-19 pandemic, 54% of respondents reported **increased use** of their online forums—with increases in posts from the organizations as well as increases in posts or responses from members. Respondents reported an uptick in forum use as well as an overall perceived **increase in value** derived from forums.

We have been using our Higher Logic community fo communicate with members on the latest so that has largely impacted use.

I think our members are really appreciating this way of connecting to each other right now.

Perceived increase in the value of membership for those groups that typically had minimal online forum participation prior to COVID-19.

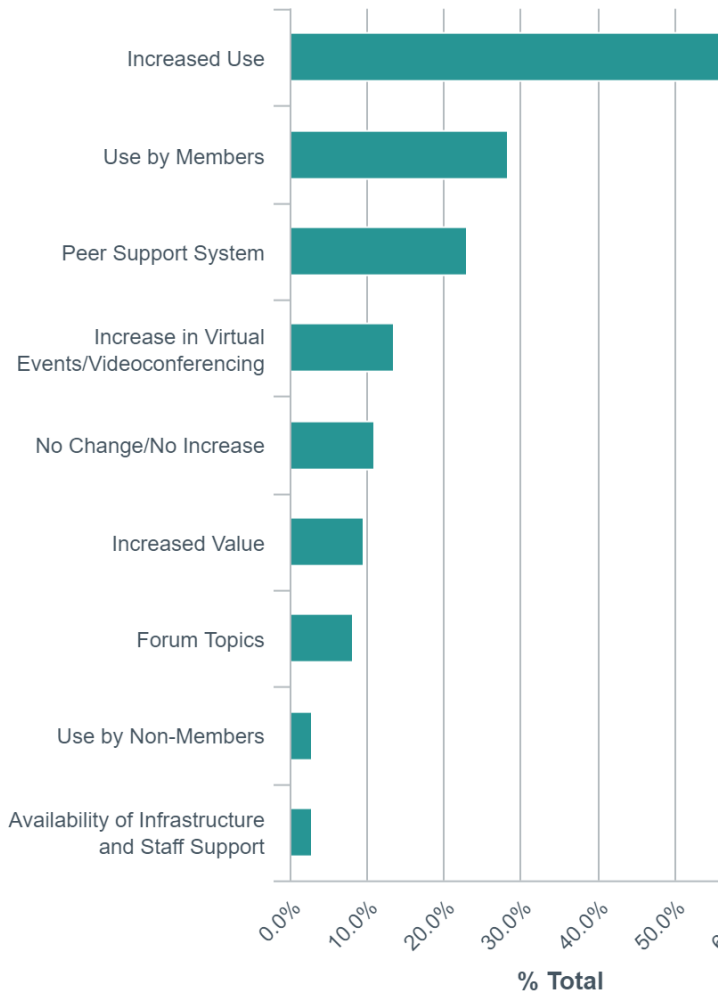We have also been directing members who are missing networking to the

Online forum has provided an excellent opportunity for more members with more engagement opportunities

The level of use of our online members only forum has not really changed

Powered by Clarabridge

n= 36

Online Forums Used as Peer Support Systems

Approximately **18%** of respondents commented that they have been utilizing their community forums as **peer support systems**, primarily for members but also among association professionals. This is particularly true of respondents from **small associations**, who discussed online forums as peer support systems at higher rates than respondents from medium or large associations.

Chart: % Total

Category	
Increased Use	
Use by Members	
Peer Support System	
Increase in Virtual Events/Videoconferencing	
No Change/No Increase	
Increased Value	
Forum Topics	
Use by Non-Members	
Availability of Infrastructure and Staff Support	

Axis: 0.0%, 10.0%, 20.0%, 30.0%, 40.0%, 50.0%

% Total

Powered by Clarabridge   n= 74

> We have also been directing members who are missing networking to the community as a space to network in lieu of in-person events.

> Peer to peer - and an opportunity for the association to see what is on the minds of its members.

> It is also been a way for members to share online resources, free courses, and peer to peer advice with one another.

> They have

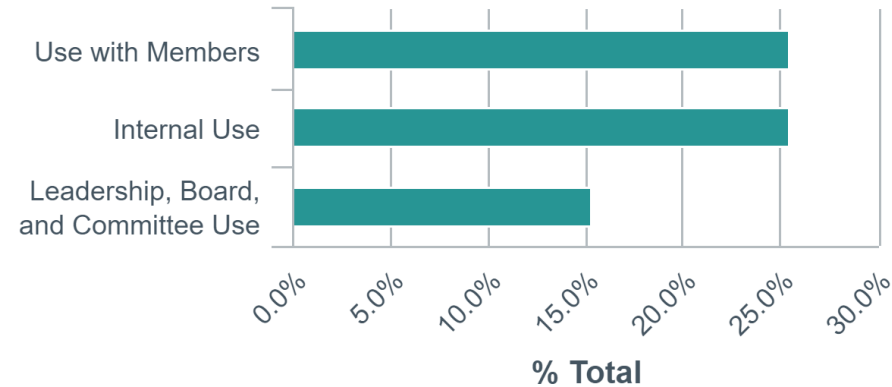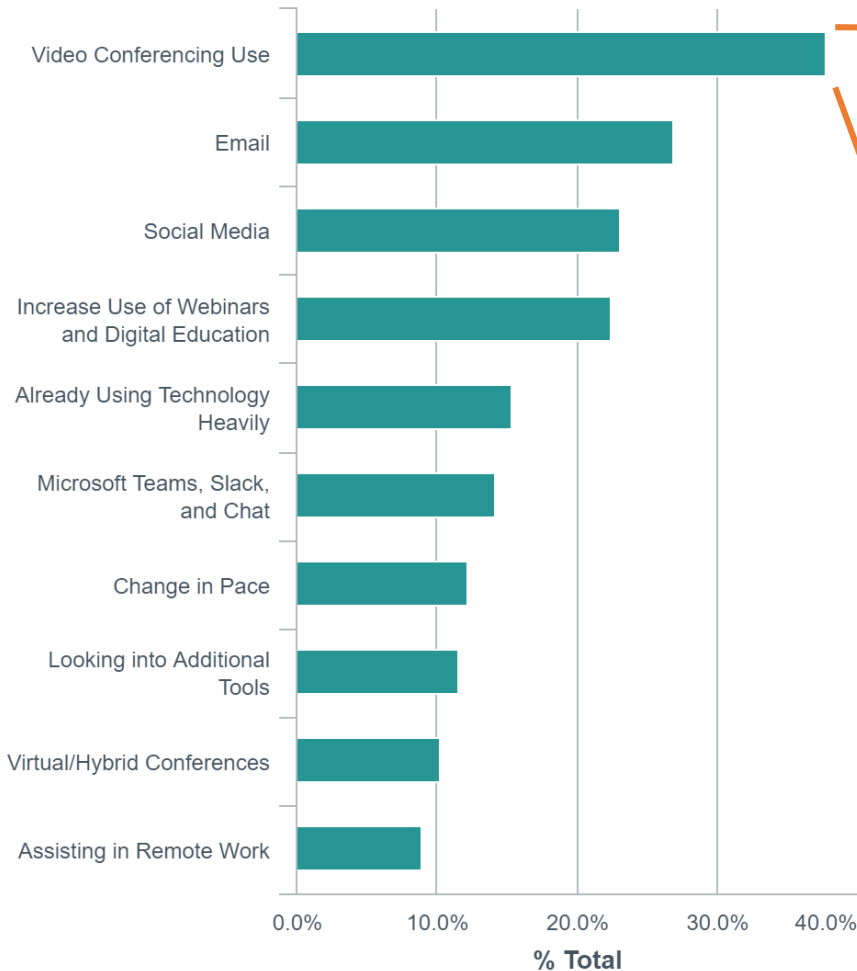> Our members have adopted them quickly as a means

Powered by Clarabridge   n= 21

Impact on Technology Use

How has COVID-19 impacted your organization's approach to leveraging technology both internally and to connect with members?

Creative Use of Video Conferencing

Powered by Clarabridge n= 156

Powered by Clarabridge n= 59

Video conferencing use was the top topic of commentary related to technological impacts of COVID-19, with **37%** of respondents mentioning it. Specifically, respondents discussed **use with members**, **internal use**, and **leadership, board, and committee use**.

Lack of Online Forums = More Video Conferencing

Video Conferencing Use — chart by % Total with categories:
- Video Conferencing Use
- Email
- Social Media
- Increase Use of W…
- Change in Pace
- Microsoft Teams, Slack, and Chat
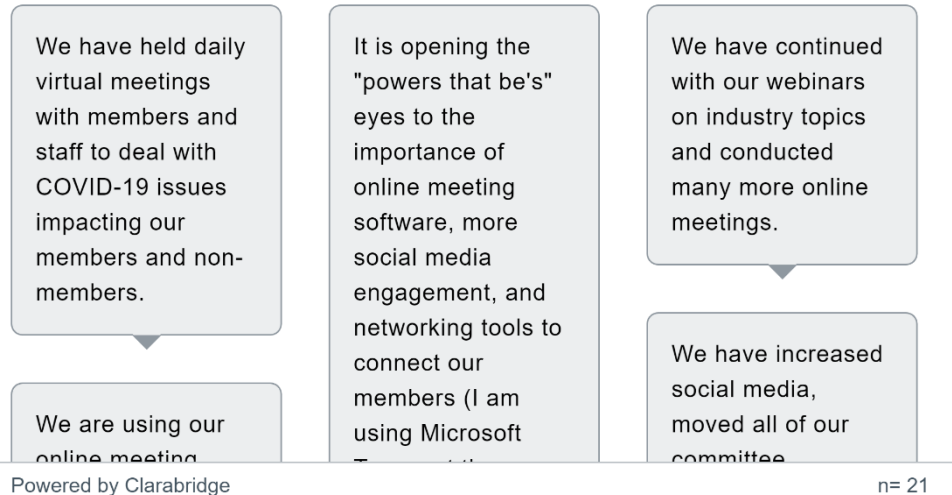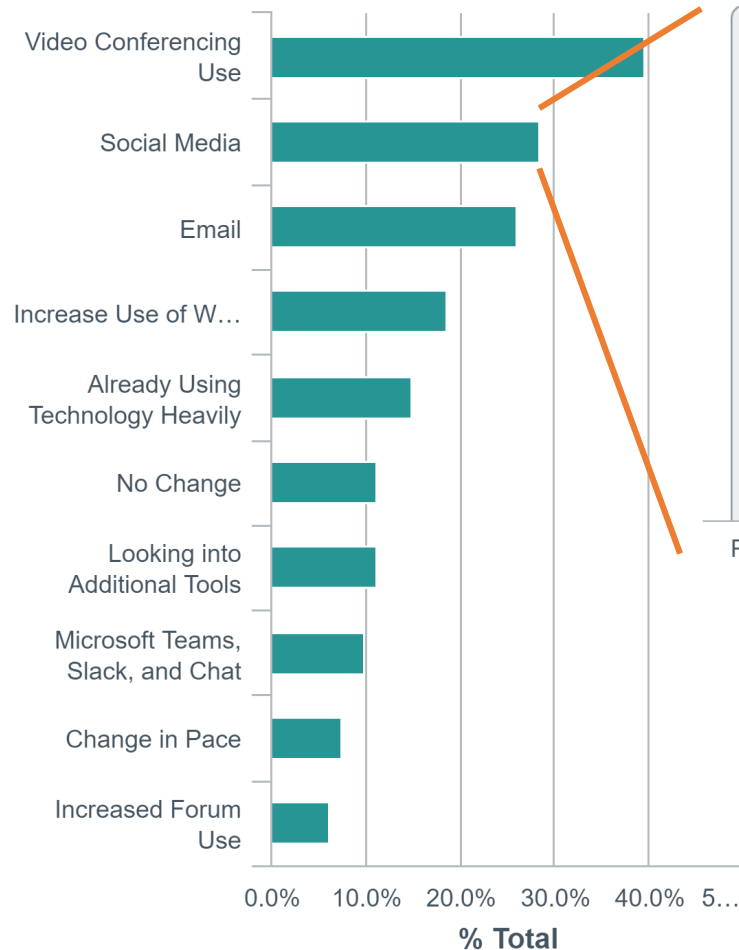- No Change
- Already Using Technology Heavily
- Looking into Additional Tools
- Virtual/Hybrid Conferences

X-axis: 0.0%, 10.0%, 20.0%, 30.0%, 40.0%, 5…
% Total

Powered by Clarabridge   n= 49

We have held daily virtual meetings with members and staff to deal with COVID-19 issues impacting our members and non-members.

We are using our online meeting

It is opening the "powers that be's" eyes to the importance of online meeting software, more social media engagement, and networking tools to connect our members (I am using Microsoft

We have continued with our webinars on industry topics and conducted many more online meetings.

We have increased social media, moved all of our committee

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43% of respondents **without online community forums** reported increased reliance on video conferencing, compared to **36%** of those **with online community forums**.

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Small Associations Increase Social Media Use

Chart bars (% Total, n= 81):
- Video Conferencing Use
- Social Media
- Email
- Increase Use of W...
- Already Using Technology Heavily
- No Change
- Looking into Additional Tools
- Microsoft Teams, Slack, and Chat
- Change in Pace
- Increased Forum Use

X-axis: 0.0%, 10.0%, 20.0%, 30.0%, 40.0%, 5...

% Total

Powered by Clarabridge   n= 81

Quote boxes:

(1) We have absolutely increased our social media engagement, even working with related organizations to create a hashtag (#CatholicCares) to help connect members in the

We have had more engagement and a stronger social media presence.

It is opening the "powers that be's" eyes to the importance of

More social media engagement;

We have developed a workflow and best practices for these and have increased the email and social

Powered by Clarabridge   n= 23

Small associations (annual revenue <$5 million) were more likely to report **increased social media use and engagement** (28% of respondents) than either medium or large associations.

Medium Associations Increase Use of Microsoft Teams, Slack & Chat
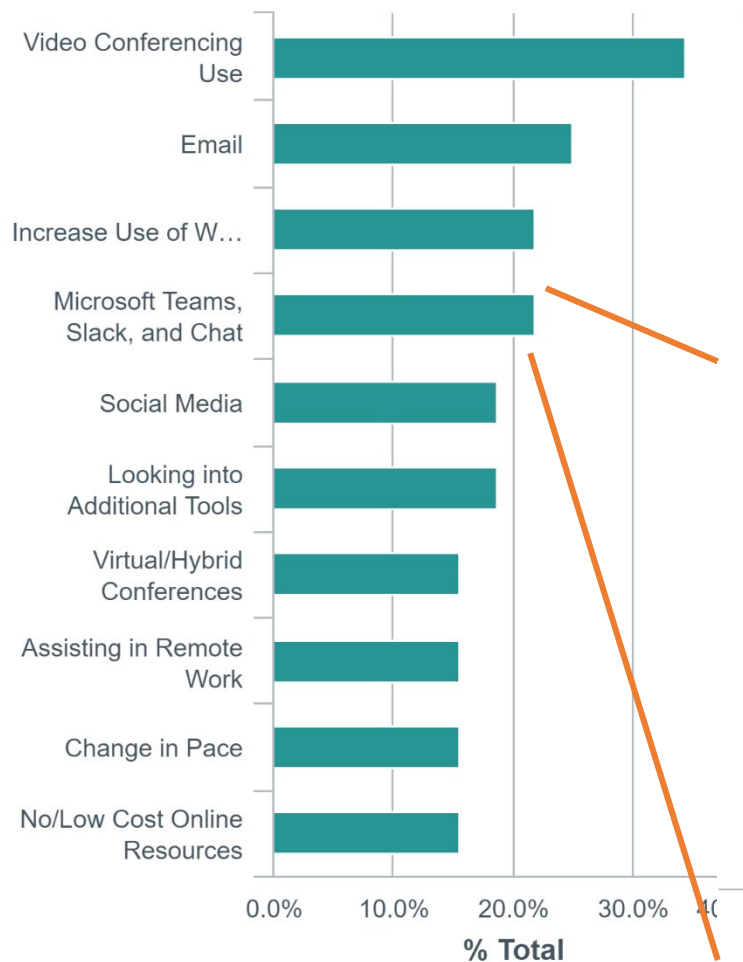
Medium associations (annual revenue $5 million – $10 million) were more likely to report **increased use of Microsoft Teams, Slack, and chat** (22% of respondents) than either small or large associations.

Video Conferencing Use

Email

Increase Use of W…

Microsoft Teams, Slack, and Chat

Social Media

Looking into Additional Tools

Virtual/Hybrid Conferences

Assisting in Remote Work

Change in Pace

No/Low Cost Online Resources

0.0%   10.0%   20.0%   30.0%   40.0%

% Total

Powered by Clarabridge   n= 32

Fortunately, we had implemented Microsoft Teams last year, so that has been a tremendous tool for our staff during this time.

We also began using Microsoft Teams

Increased use of previously lightly used tools, like Microsoft Teams

Our organization has really embraced Slack and Zoom

Collaboratively (internally) we are looking for tools to better help us such

We have been trying to get Microsoft Teams launched as well, to migrate away from some clunkier tools we use, but is not #1
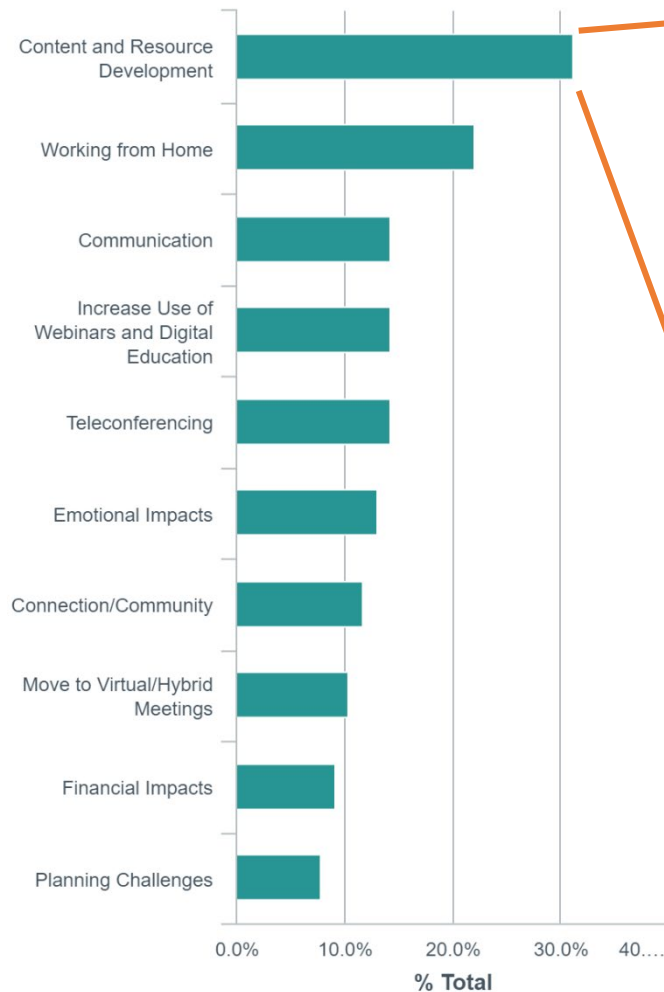
Powered by Clarabridge   n= 7

Innovation in Trying Times

Is there anything else you would like to share with your association colleagues that you think they may find beneficial?

Associations Innovate with Content & Resource Creation

Content and Resource Development
Working from Home
Communication
Increase Use of Webinars and Digital Education
Teleconferencing
Emotional Impacts
Connection/Community
Move to Virtual/Hybrid Meetings
Financial Impacts
Planning Challenges

0.0% 10.0% 20.0% 30.0% 40...

% Total

Powered by Clarabridge   n= 77

We created a page within our website to serve as a platform for both sharing and promoting how our members are responding to the pandemic

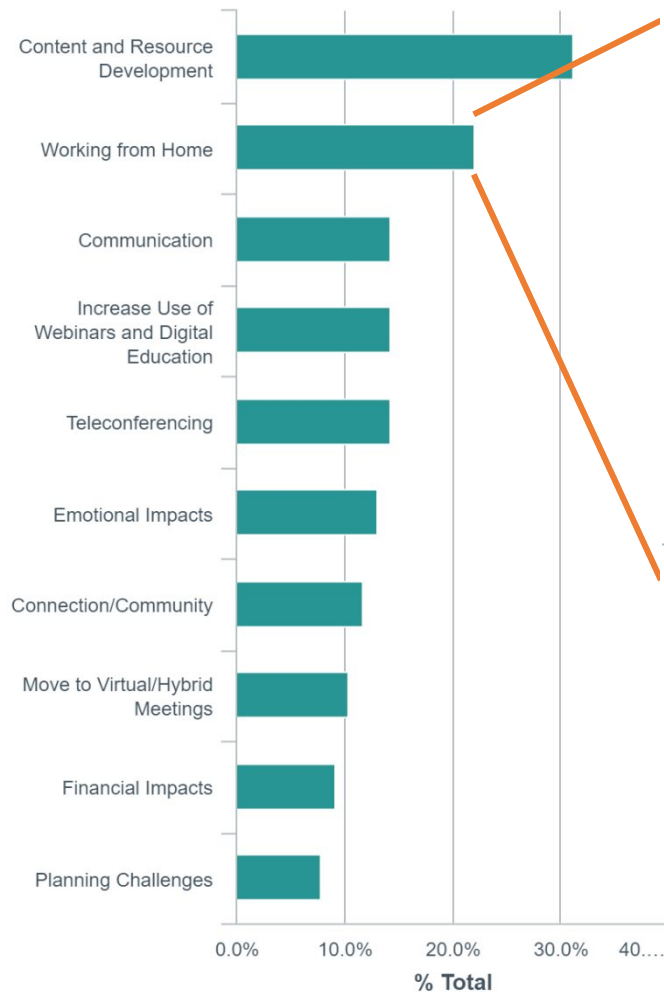Continue to provide resources

What is interesting about that is we also opted to create a last

We are doing more in social media, our online forum and website, plus our weekly and monthly newsletter.

Powered by Clarabridge   n= 24

Respondents reported innovating by creating, curating, and/or sharing **content and resources**. Many respondents' organizations are providing COVID-related industry news to their members as they look to position themselves as **sources of trusted industry information**.

Chart: % Total (n= 77)
- Content and Resource Development
- Working from Home
- Communication
- Increase Use of Webinars and Digital Education
- Teleconferencing
- Emotional Impacts
- Connection/Community
- Move to Virtual/Hybrid Meetings
- Financial Impacts
- Planning Challenges

X-axis: 0.0%, 10.0%, 20.0%, 30.0%, 40.…%
% Total

Powered by Clarabridge   n= 77

We went from a virtually no-working from home environment to exclusively working from home in about 2 days.

what cadence we should use and what operations we should consider to return to work safely in the office

I wonder how this will impact office structures in the future.

opportunities to interact with

Powered by Clarabridge   n= 17

Working from home was the second most commented upon topic (22%). Comments varied regarding respondents' experiences working from home. For some, the transition was **quick and/or easier than expected**, while for others it has been **difficult with spouses, children, and pets** to manage. Other respondents considered **what the future will look like**—whether remote work will continue, how to go back to the office, and potential for saving on real estate costs.

Appendix

Survey Questions

1. Which of the following has your association done in response to COVID-19? (Please select all that apply)

   - Developed new products or services to help members respond to COVID-19

   - Reduced membership dues

   - Delayed membership dues collection

   - Reduced the number of employees

   - Canceled in-person events (conferences, networking events, trade shows, educational opportunities, etc.) for members

   - Postponed in-person events for members

   - Replaced in-person events with virtual events

   - Created forums for virtual events

   - Other

   ▶ If "other," please elaborate.

Survey Questions

2. On an individual level, what aspect of how you have responded to the COVID-19 situation has surprised you the most? (Please elaborate as to whether it has been a positive or negative surprise.)

3. In-person communication and networking have become problematic because of COVID-19. Does your organization have online forums where members can communicate with one another electronically?

   - Yes

   - No

4. How has the use or value of these online forums changed for your organization since the emergence of COVID-19?

5. Are you considering moving one or more of your in-person conferences to be virtual, or have you done so already?

   - We are not considering moving any of our in-person conferences to be virtual.

   - We are considering moving one or more of our in-person conferences to be virtual.

   - We are currently in the process of moving one or more of our in-person conferences to be virtual.

   - We have already held a virtual conference as a replacement for a planned in-person conference.

   - Not applicable to my organization.

Survey Questions

6. How has COVID-19 impacted your organization's approach to leveraging technology both internally and to connect with members? (e.g., increasing social media engagement, more frequent email campaigns, …)

7. What type of membership organization is your primary employer?

   - Individual-based membership organization

   - Organization-based membership organization

   - Hybrid of (a) and (b)

   - Charity

   - Association management firm

Survey Questions

8. What is your primary employer organization's annual budget?

   - Less than $1 million

   - $1 million to less than $2 million

   - $2 million to less than $5 million

   - $5 million to less than $10 million

   - $10 million to less than $20 million

   - $20 million or more

9. Examples of Innovation in Trying Times: Is there anything else you would like to share with your association colleagues that you think they may find beneficial (e.g., changes to operations, interactions with members)?

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Innovative Insights.
Driving Results.