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Member Retention through Continuing Education

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An independent study project report by The McLean Contributionship Endowed Education Intern (2013-2014)

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Member Retention through Continuing Education

Abstract

Since the start of Fiscal Year 2013 Morris Arboretum received 1,297 registrants for continuing education courses (excluding the School of Arboriculture and symposia but including Growing Minds programming for families). Out of those 1,297 registrants, 61% were designated as member registrants. At the same time, 10.5% of Arboretum memberships were associated with course registrations. Assuming that membership retention often occurs through increased involvement, then it follows that an increase in continuing education participation from members should result in continued or added financial support. With this knowledge, we need not offer a larger quantity of classes but should instead tailor our offerings to provide the most engaging opportunities for new class-takers as well as continuing to engage our current class-taking members. This approach to facilitating retention and positive growth within the continuing education program as well as within membership involves converting non-class taking members into class-taking members while, at the same time, retaining our current class-takers.

The primary action of this project was to use research to inform program offerings resulting in a deeper understanding of our continuing education audience. This study involved research through membership records, demographic analysis, interviews, and an online survey. This research resulted in four recommendations for future programming: continue to offer a variety of classes at a variety of times, increase marketing efforts, look for new ways to engage the most populated membership categories, and continue to focus programming on collections, landscape, and gardens.

Disciplines

Adult and Continuing Education | Horticulture

Comments

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Title: Member Retention through Continuing Education

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Date: April 2014

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BACKGROUND & GOALS

Morris Arboretum Mission Statement:

“The Morris Arboretum of the University of Pennsylvania is a historic public garden and educational institution. It promotes an understanding of the relationship between plants, people and place through programs that integrate science, art and the humanities. The Arboretum conducts four major activities: education, research, outreach, and horticultural display. As the official Arboretum of the Commonwealth of Pennsylvania, the Morris Arboretum of the University of Pennsylvania provides research and outreach services to state agencies, community institutions and to citizens of Pennsylvania and beyond.”

In the heart of the Morris Arboretum mission statement we see a clear inclusion of and emphasis on education. The Continuing Education Department, located within the Public Programs branch of the Arboretum, has evolved to embody this mission, offering an impressive spread of classes and workshops pulled together by a small yet efficient team. With two course brochures filled with almost 150 programs each year, the Continuing Education Department offers a range of opportunities for both members and non-members to engage with the collections, staff, research, and landscape at the Arboretum. Continuing Education offers a structured introduction for newcomers as well as a deeper connection to the Arboretum for long-time friends, visitors, and members.

Between 7/1/2012 and 2/1/2014 Morris Arboretum received 3,772 registrations for continuing education courses (excluding the School of Arboriculture and symposia but including Growing Minds). During the same timeframe, those 3,772 registrations were made by 1,297 registrants for continuing education courses. Out of those 1,297 registrants, 61% were designated as member registrants. At the same time, just 10.5% of Morris Arboretum memberships were associated with course registrations. If it's true that membership retention often occurs through increased involvement, then it follows that an increase in continuing education participation from members should result in continued or added financial support. With this knowledge, we need not offer a larger quantity of classes but should instead tailor our offerings to provide the most engaging opportunities for new class-takers as well as continuing to attract our current class-taking members. This approach to facilitate retention and positive growth within the continuing education program as well as within membership involves converting non-class taking members into class-taking members while, at the same time, retaining our current class-takers.

The primary action of this project was to use audience research to inform program offerings and registration trends, resulting in a deeper understanding of our current and potential audience. The emphasis of this project was on continuing education programs.

Over the past few months, my project has gone through several phases:

1. Baseline study of the audience
2. Audience survey and analysis of survey results
3. Interpretation of results with recommendations for continuing education programs.

Scope of Study & Defining Terms

For this study, I chose to focus on specific constituencies within a specific timeframe. The two main constituencies I researched included:

1. **Members who have taken classes** ('class-taking members')
2. **Members who have not taken classes** ('non-class taking members')

For this study, a **'member'** is someone associated with any level of active membership within 7/1/2012- 2/1/2014. A **'class-taker'** is someone who has paid for a course registration within the same time frame, 7/1/2012- 2/1/2014.

Registrations from the School of Arboriculture or other special conferences or symposia have been excluded from this study. The School of Arboriculture at the Morris Arboretum does not primarily seek to engage members, but instead serves as a resource for regional professionals. By excluding this constituency, I avoided diluting the results of the baseline study and survey with responses from a distinctly separate demographic.

Later in the study, I began to look at non-member class-takers and have included a brief overview of this constituency's demographics and habits. I included this constituency mainly as an introduction to an area of further study, not as a main component of my comparison and recommendations.

BASELINE STUDY

Member Information & Audience Analytics

To get a better understanding of our current class-taking audience, I analyzed information that had been previously collected from our membership using records stored in Raiser's Edge in combination with the Audience Analytics resource provided by the Greater Philadelphia Cultural Alliance. Throughout this preliminary study, I focused on the demographics and preferences of the previously described constituencies: members who have taken classes, and members who have not taken classes.

I. Raiser's Edge

When someone purchases a membership at the Arboretum, a unique entry is created in Raiser's Edge to hold information regarding giving, attendance at events, and other interactions with the organization. Using this database, I was able to pull queries based on common activities such as payment for membership, class registrations, status as a volunteer, or membership level. The main lists I used throughout this phase of the study included cross-penetration lists of class-taking and active membership within the designated timeframe. I pulled lists of members who had taken classes within the timeframe, members who had never registered for a class, and also class takers who were not active members. The three lists I used were as follows:

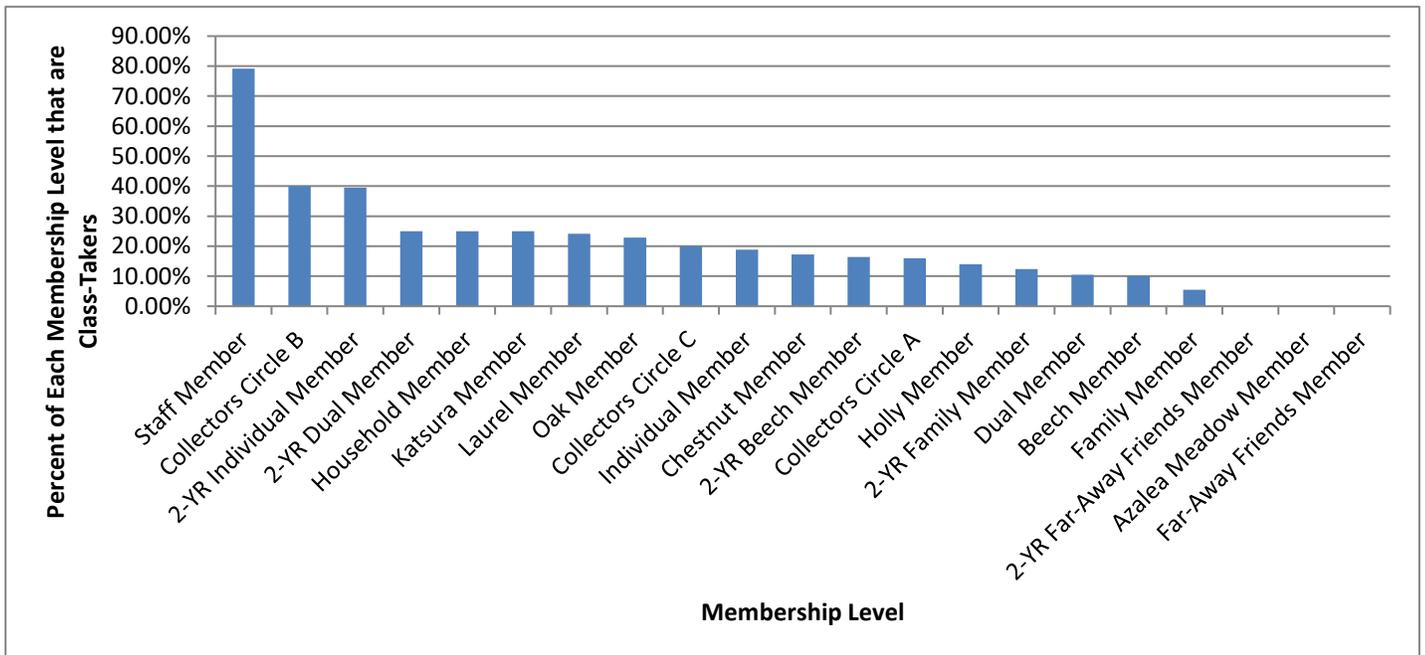
Class Taking Members- 785 records (10% of total membership, 61% of total class takers)

Non Class Taking Members- 6,711 records (90% of total membership)

Class Taking Non Members- 512 records (39% of total class takers)

By exporting data associated with these lists, I was able to learn more about our constituencies. I found the two following categories to be the most significant:

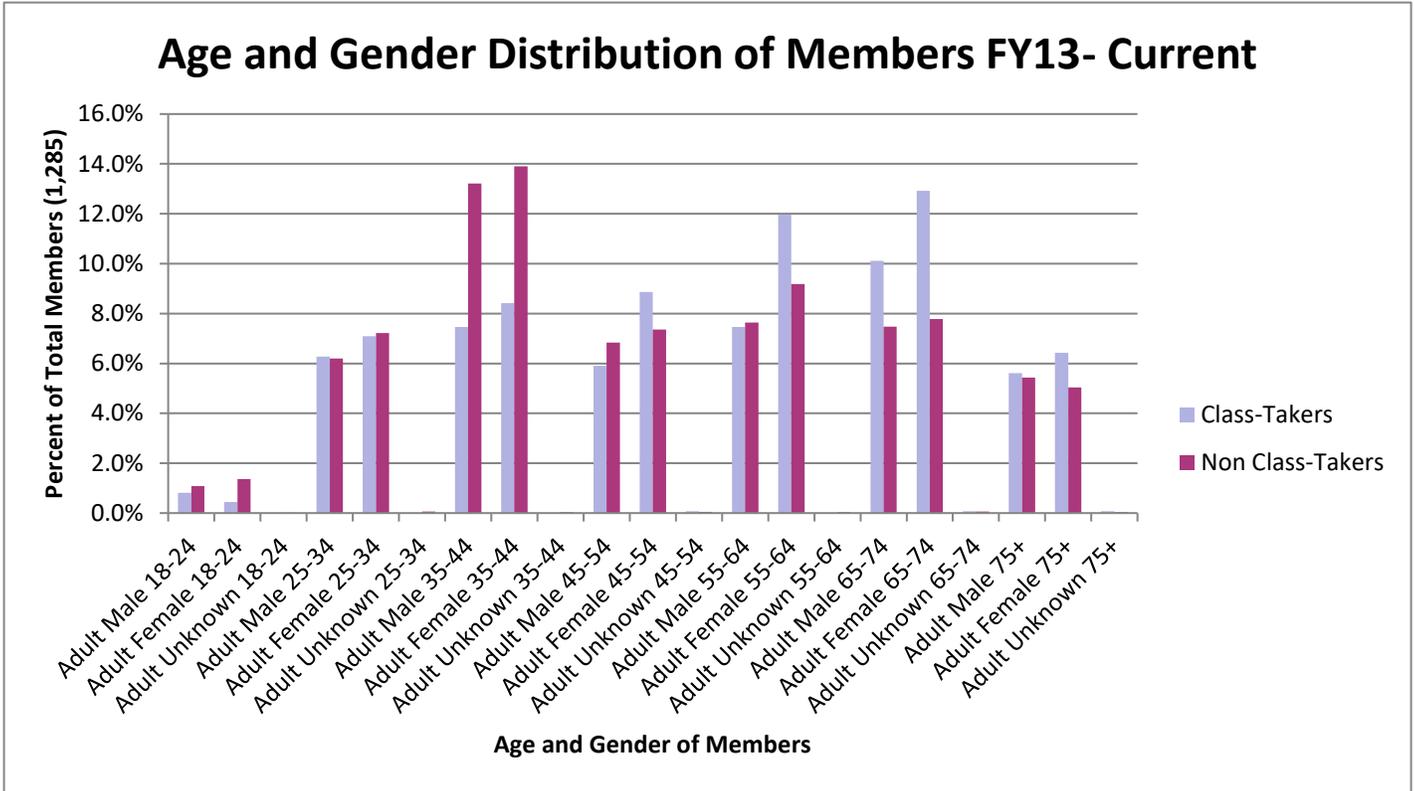
1. **Constituent Codes:** Each constituent entry in Raiser’s Edge is associated with a code. These codes describe a person’s relationship to the Arboretum and can describe a constituent as a staff member, volunteer, student, board member, etc. For this study, I wanted to evaluate if there was a correlation between class-taking and additional involvement at the Arboretum. 9% of class-taking members are also Arboretum volunteers while only 1% of members who have not taken classes are Arboretum volunteers.
2. **Membership Categories:** Similarly, membership levels are recorded in Raiser’s Edge. I wanted to see if one category of membership was most likely to take classes so I pulled information of membership levels. The following chart displays the percent of each membership level that has taken classes within the specified timeframe:



II. TRG Arts Audience Analytics

After pulling this constituency information, I uploaded the lists onto TRG Arts Audience Analytics System, a resource made available to local cultural institutions by the Greater Philadelphia Cultural Alliance. By uploading these lists into the Audience Analytics System, I was able to run demographic reports, obtaining information on our constituency in general, not on specific individuals.

Looking at the demographic reports from TRG, I searched for significant differences between the two constituencies. The biggest difference in audience demographics appeared in most populated age groups. The most populated age category for non-class taking members is younger compared to the class-taking members:



Online Survey

Following the baseline study, I developed an audience survey for both class-taking and non-class taking members. I looked for gaps in my baseline study and then built the survey around additional information I wanted to evaluate. To get a sense of attitudes toward continuing education from our membership as a whole, I created one survey that was sent out to our membership list. This survey included skip logic to direct the survey through the questions based on membership status and class-taking habits. The survey (Figure 2) was distributed to all members with active, usable email addresses through SurveyMonkey on February 28, 2014. The survey was sent to 5,445 member email addresses.

The survey consisted of 16 questions, although each respondent answered fewer questions based on the skip logic built in to the survey. For example, if a person responded that they had taken a class at the Arboretum, they would be taken to a separate set of questions than a person who responded that they had not taken classes.

To inspire participation, people who completed the survey would be entered in a raffle to win a \$30 gift voucher to be used toward a Continuing Education class at the Arboretum or in the

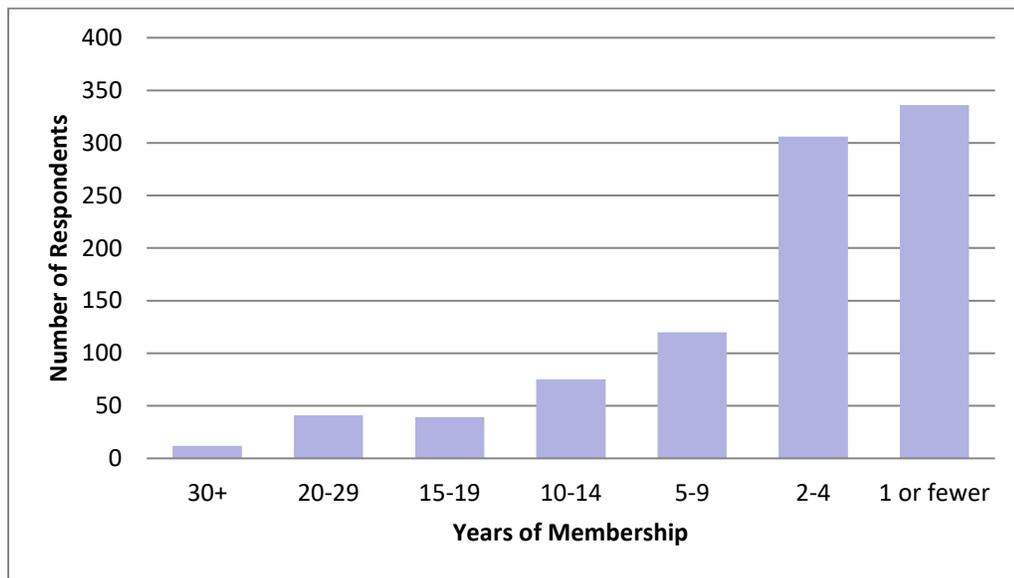
gift shop. After two reminder emails were sent, I had received a total of 943 completed surveys for a total response rate of 17%. A typical response rate for an online survey is 10-15% (REF.).

With close to 1,000 responses, there was a large amount of information to sift through. A full summary of the survey is included in this report. Below are the 16 questions included in the survey, along with a summary of the results and brief commentary:

1. “Are you a member of the Morris Arboretum?”

97% responded yes, 3% responded no. Out of the people responding “no”, many of them indicated they had lapsed memberships and/or planned to renew in the “other (please specify)” option.

2. “How many years have you been a member of the Morris Arboretum?”



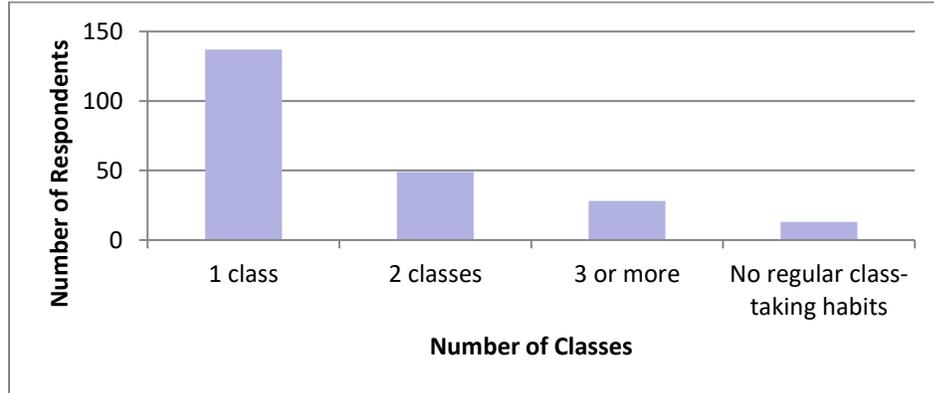
3. “Have you ever attended a class at the Morris Arboretum?”

70% of respondents indicated they had not attended a class at the Arboretum; 30% indicated that yes, they had taken a class.

4. “Did you take any classes at the Arboretum before you became a member?”

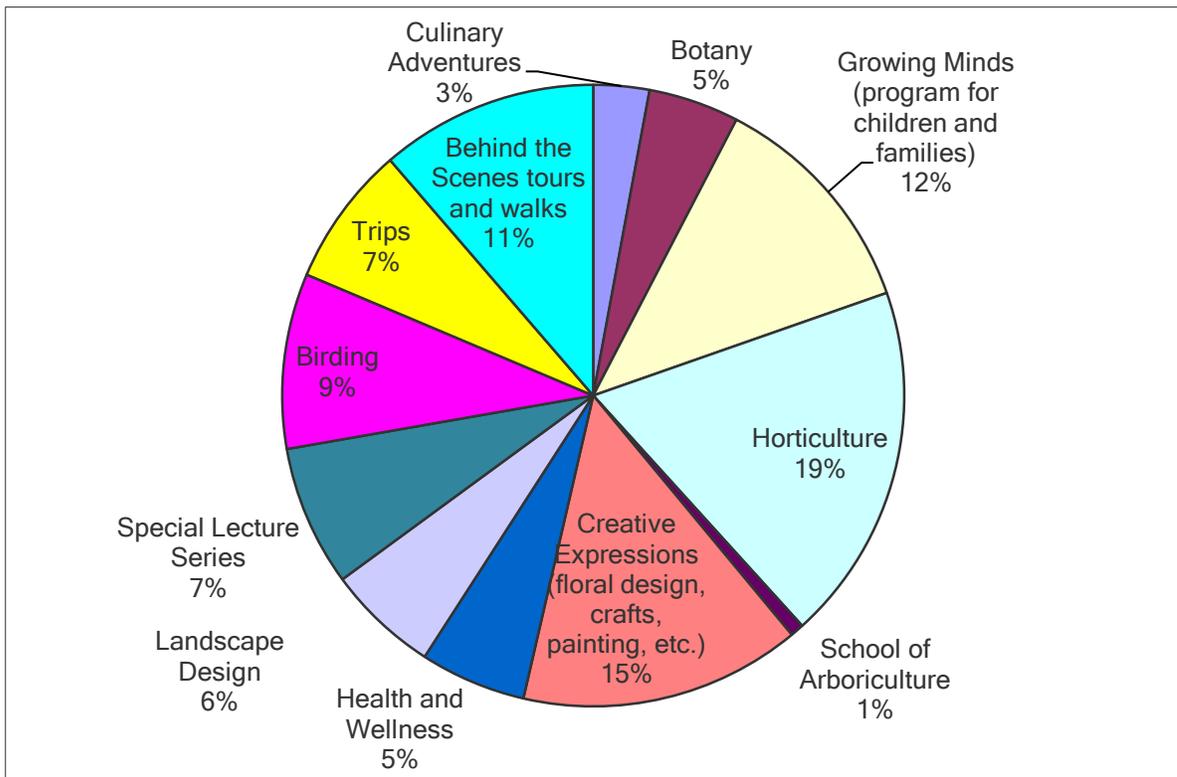
79% of respondents did not take a class before becoming a member; 21% indicated that they had taken a class before purchasing a membership.

5. “How many classes do you attend each year at the Arboretum?”



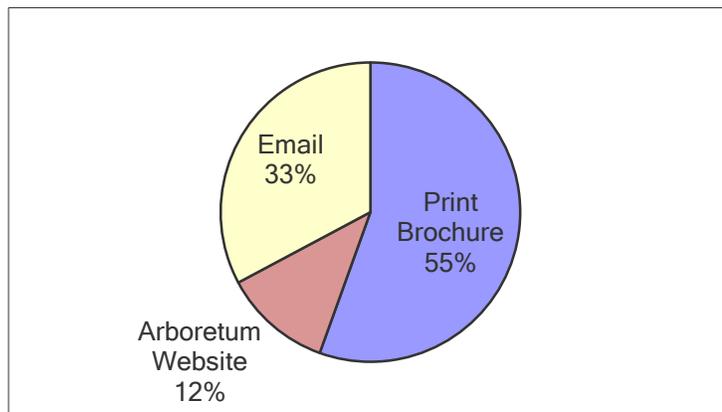
6. “Which category of class interests you most? Please pick your favorite option!”

Because I wanted to focus in on class-taking preferences of members, I required respondents to choose only one class category. The answer options for this question were based on the class categories regularly offered at the Arboretum and are an exact replication of a question we frequently send out for course evaluations.



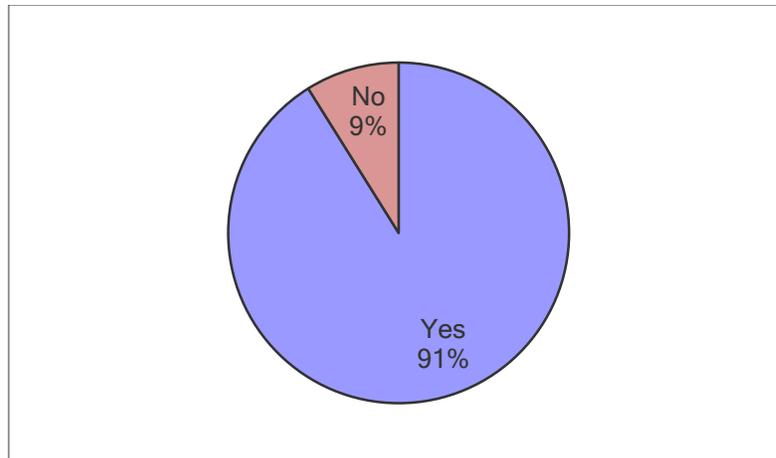
7. “How do you prefer to find out about classes?”

Based on previous course evaluations, I included only the 3 most popular communication options: Email, Print Brochure, and Arboretum Website.

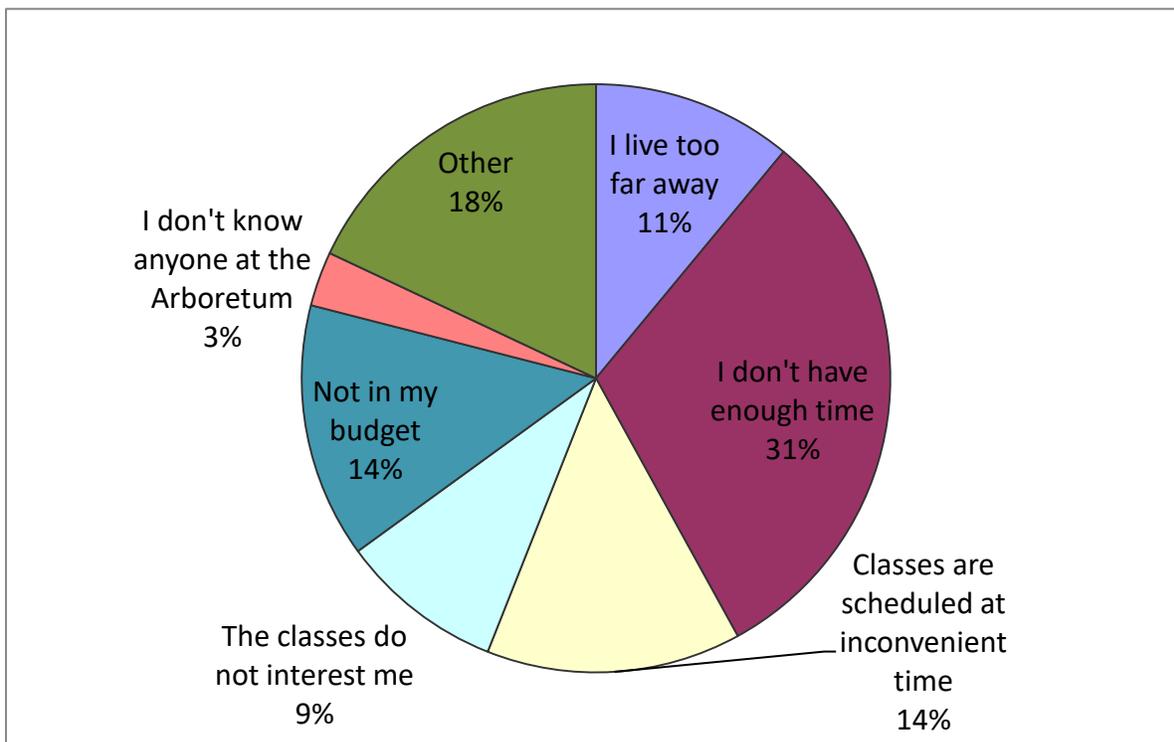


8. “Based on the classes you have taken in the past, do you feel that the cost of the class was reasonable?”

Again, several people wrote-in comments using the “Other (Please Specify)” options. These responses can be seen in Fig. 4



9. “What is the main reason you have not yet taken a class at the Arboretum?”



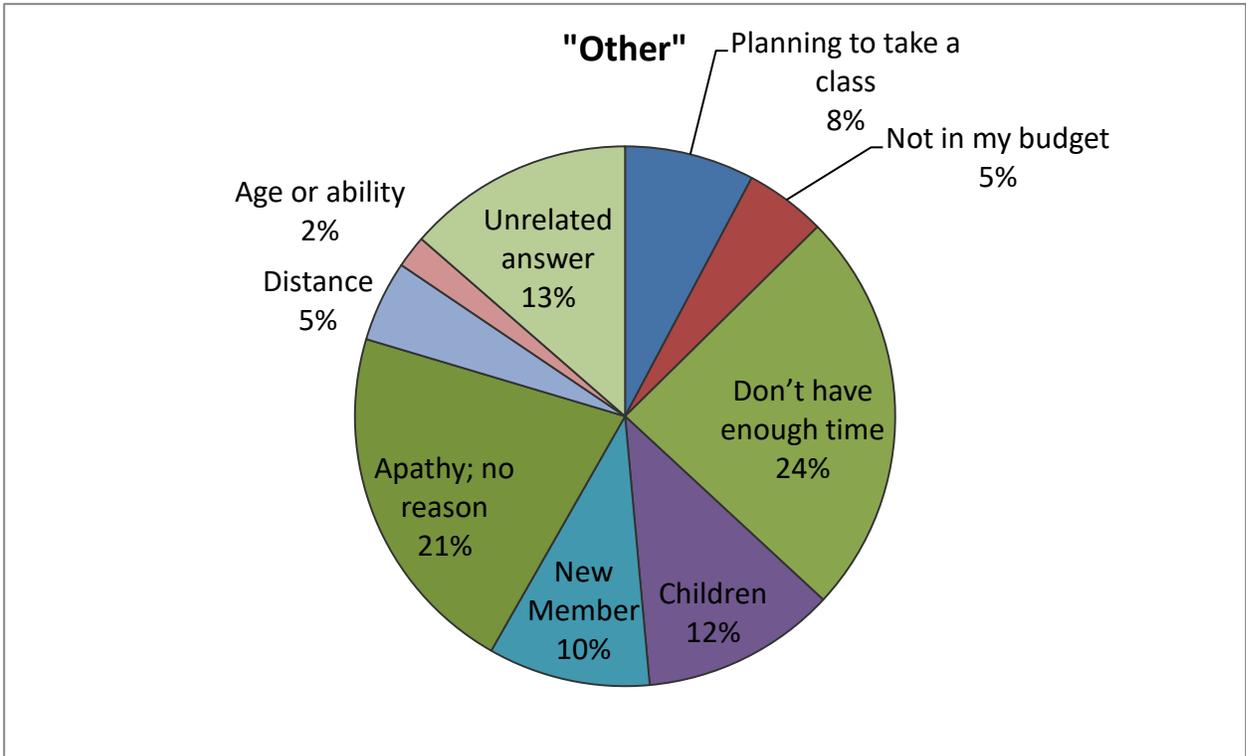
For simplicity’s sake, I chose to make this a multiple choice question. Otherwise, I would have spent a significant amount of time interpreting each open-ended answer. To avoid putting words in people’s mouths, I added an “other, please specify” option, which I interpreted in the following table. I looked for common themes and keywords, which resulted in 9 additional categories. Most of these categories are self-explanatory, but I will elaborate on the less obvious ones:

“Planning to take a class”- Several respondents mentioned that they had not taken a class but were interested. Some said they hadn’t thought about taking classes until reading this survey.

“New Member”- many people mentioned becoming a member over the winter and wanting to wait till spring to take a class.

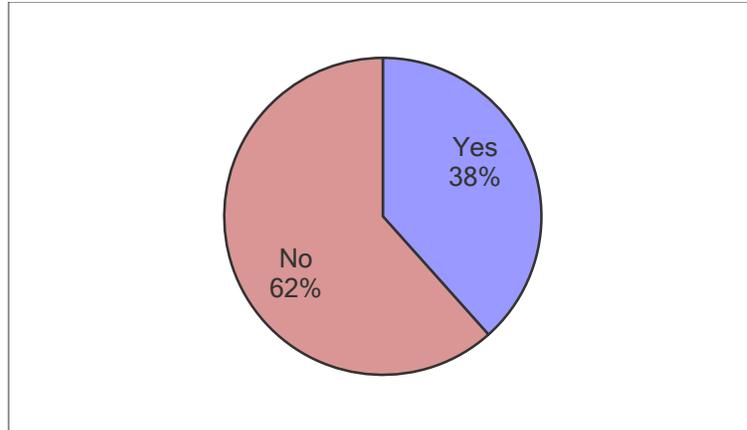
“Apathy; no reason”- Many people had no real reason for not taking a class. One person simply gave “Lazy” as a response.

“Unrelated answer”- I was unable to interpret any useful response from these submissions.



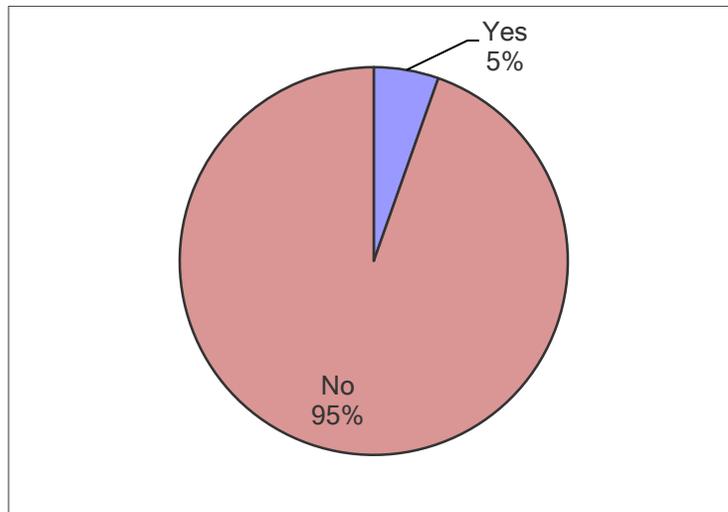
10. “Do you attend classes or workshops at other cultural institutions or museums?”

I was interested in comparing the results from this question with the results from Question 3: “Have you ever attended a class at the Morris Arboretum?” of which 70% of respondents indicated they had not attended a class at the Arboretum; 30% indicated that yes, they had taken a class.



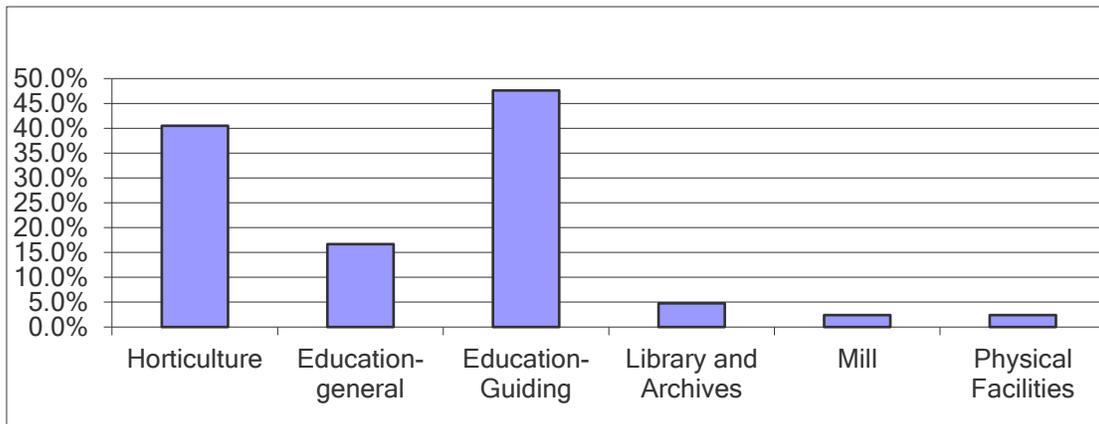
11. “Are you an active volunteer at the Arboretum?”

The results from this question were fairly similar to the statistics I had previously pulled from Raiser’s Edge which indicated that 9% of class-taking members are also Arboretum volunteers while only 1% of members who have not taken classes are Arboretum volunteers.

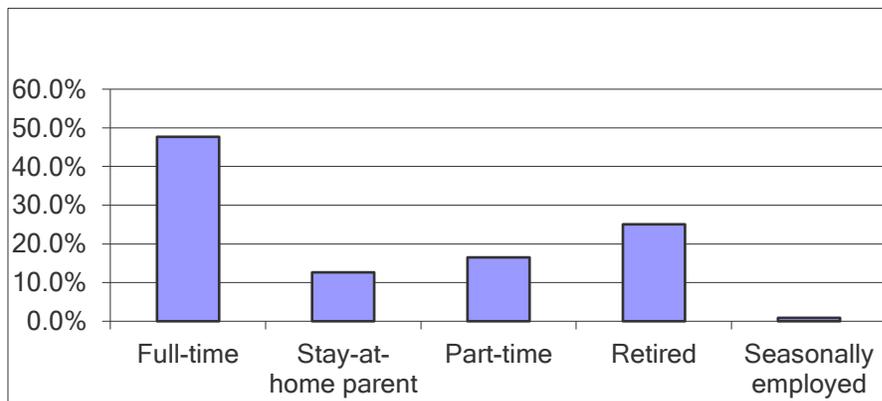


12. “In which department do you volunteer?”

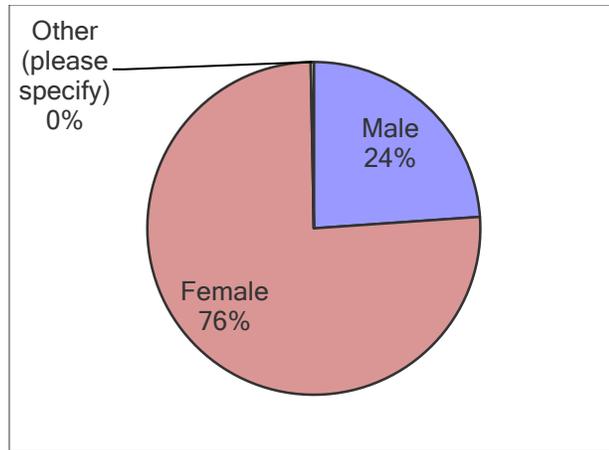
It was no surprise to see that, out of the active volunteers, most of them were either horticulture or education volunteers. Horticulture and education are our two largest volunteer groups at the Arboretum.



13. “Which of the following best describes your employment?”



14. “I am” Male/Female/Other (Please Specify)



15. “Why did you become a member of the Arboretum?”

This open-ended question resulted in hundreds of different responses. I did my best to interpret these results, looking for trends and patterns. The following table displays the results from a basic keyword with the number of times the word appeared throughout survey responses:

value	8
relax	8
cost	13
peace	14
admission	14
safe	17
discount	17
horticulture	17
plant sale	18
Groupon or Living Social	40
space	21
trains	31
beauty	36
education or classes	56
close	51
kids	193
beautiful	103
support	103
walk	162
enjoy	193

16. “We would love to hear your stories from classes at the Arboretum. Please share a good experience you had while taking a class at the Arboretum”

I left this question open-ended to allow class-takers to express themselves. While this is certainly my own interpretation of the results, in looking at responses I noticed several themes:

Gaining a new skill:

“I attended a wreath making class a number of years back and since then I make seasonal wreaths for my home and even friends. It gave me a fun skill.”

“Amazed myself when I completed a Thanksgiving center piece, a Christmas wreath and boxwood tree with lights.”

“I always enjoy the classes I take there and find them inspiring, most recently the canning class by Marisa McClellan. It really and took the fear out of jarring/canning.”

“The most valued classes I attended were those which gave me some basic training in using a dichotomous key.”

“I greatly enjoyed taking a class on creating a Thanksgiving centerpiece. I learned a lot about floral design theory and then took home a beautiful centerpiece that I created myself.”

“I learned a lot about roses and was given the will to prune more.”

“I learned how to use an architectural ruler and draw to scale in a landscape design class. I created an in scale map of my front garden. It was fun!”

“I learned the correct method for pruning trees.”

“I really enjoyed the rose pruning class. I use the information that I learned there every time I work with my roses. Very helpful and informative.”

“I took a canning class with Marisa McClellan that finally got me started with canning. Seeing her go through the canning process and hearing her give details and answer questions made a big difference for me. I also went home with a delicious jar of strawberry vanilla jam, which I will make more of this summer.”

“I took an introduction to digital photography course, which sparked an interest into macro photography. Now when my family visits we are always searching for mosses, seeds and the intricate patterns of tree bark. My daughter recently photographed Canada geese footprints in the snow.”

“It was many years ago but I took a bonsai class and it's been a passion of mine ever since.”

“Last year I took the rose pruning class and I really enjoyed helping prune with the guidance of rose society. I went right home and did mine!”

“I particularly liked the pruning class when Iana made us go out into the gardens in freezing March weather and prune the hydrangeas. I was concerned that I would make a mistake but she taught us to get aggressive and exactly where and what to cut. I gained so much confidence!”

Building Relationships

“I have taken my step daughter to a few Saturday art classes and it has helped us to bridge a otherwise precarious relationship. Thank you.”

“I'm taking a canning class in a few weeks with one of my friends. Now that we both have children, it's hard to make time to get together. This class will be a great way for us to learn more while spending some valuable time together.”

“My husband and I love to walk together through the arboretum while our daughter takes Pam's nature sleuth's class and enjoy quiet moments together!”

“The more memorable classes were one on winter tree identification taught by Paul Meyer and one on pruning, with hands-on instruction. I've also enjoyed classes on fitness while gardening, and lectures on horticulture. I also find interesting people attending the classes.”

Rest and Reflection

“I took a drawing course when I was home on maternity leave - so 17 years ago. I sat under pine trees and looked down over the wet meadow. It was so peaceful and the air smelled delicious. For a couple hours once a week, it was an escape to heaven.”

“Jennifer Schelter's yoga outside in the arboretum's meadow- the smells- the sun setting- truly tuning in to all the sounds and smells- makes me feel summertime through every pore! seeing the underbelly of a flying duck at sunset during yoga with Jennifer.”

“Summer evening yoga classes on the hill looking out into the trees and sky were sublime and better than an expensive vacation.”

“Took Tai Chi. Loved the meditative, peaceful feelings. Still practice.”

“Yoga in the trees is inspiring and amazing. I lived for those early Saturday mornings!”

“Yoga on a limb was a magical experience. You felt like you were floating in the trees. Fabulous teacher, amazing venue.”

“Your outdoor evening yoga class is wonderful. It's such a gorgeous place to do yoga and connect with nature.”

Children's Enrichment

“It was my 2 year olds first class experience, they took the class led by Pam. It was incredible to see how engaged, excited and curious they were during the class. Beautiful grounds to explore and learn.”

“Ms. Pam taught a class on turkeys around thanksgiving, and she had a turkey that was in the woods and it was gobbling, and the kids had to find it. Then when we found the turkey, she had made "baby turkeys" out of pine cones for the kids. It was great.”

“My 3 year old was very engaged in the growing minds class and spoke up when Ms. Pam asked the class questions. It was the first time I had ever heard her proudly answer a question in a classroom setting by herself.”

“My 9 year old daughter took some AMAZING photos in her Nature Photography class.”

“My daughter loves Miss Pam she is wonderful with the kids. We all get plenty of exercise and make fun crafts in her class!”

“My daughter took the photography class and had a good time "discovering" places in the arboretum.”

“My niece and I took a painting class and we so appreciated that it was accessible for my niece. We had fun painting!”

“My son and I attended one of the nature classes for children this past autumn. It was amazing to watch him learn and explore, and to see things through his eyes!”

“My son took the photography class & loved it.”

“My little girl experienced her first gazebo, first scarecrow contest, first Fernarium, first giant insect exhibit, and first winter sledding experience, and bought her first umbrella, played in her first giant birds next, and bonged her first gong at the Morris Arboretum.”

“Seed to Sprouts is simply the greatest class. My daughter learned so much. The teacher was so knowledgeable but kept it to a child's level of understanding. Such a rewarding class.”

MEMBER TESTIMONIALS

Additionally, I asked 12 active members to share stories about their experience in classes at the Arboretum. While this information is not quantitative, I wanted to get at the heart of our purpose in offering classes in the first place- to connect people, place and plants. Many of these interviews repeated similar themes to the ones found in the open-ended questions in the survey.

The following are some highlights from my interviews:

“[I met] interesting, vastly different people - some with amazing knowledge.”

“[I met] someone on this trip who is a landscape designer - she was extremely interesting to talk to and I learned some things that I could use in my own garden.”

“I have taken many great classes over the course of the many years I have belonged but what really stays with me are the relationships I have developed with my teachers and classmates. I have met them outside the classroom and we have become friends, colleagues and partners.”

“The one class I have taken consistently is the Yoga in the Garden class offered over the summer. The class hasn't necessarily enlarged my knowledge of horticulture but it has given me a greater sense of the beauty of the place. Sunset over the Magnolia Slope is truly stunning. I always leave with a sense of peace and well-being.”

“The last class I took was with Tim Block. It was a botany class on fruits. I love systematics. It fun to put things in groups because you can think more quickly, for instance a watermelon is a berry. The seeds are inside, unlike a strawberry with the seeds on the outside. Tim had a beautiful display of fruits. Many of them we had never seen. When the lecture was over we ate the display. How much fun is that?”

NON-MEMBER CLASS TAKERS

While looking at class-taking members and non-class taking members, a third constituency became interesting: class-taking non-members. I created a list of these individuals and ran a very basic demographic report. Most importantly, I pulled membership information on these constituents to see if they were lapsed members. Out of these non-members, 207 out of 512 (or 40%) records were associated with a lapsed membership. So this number, combined with the lists of class-taking members, show us that 992 out of 1,297, or 76% of class-takers were at some point associated with a membership. This method falls slightly outside the scope of this study, but would be helpful as a starting point for further research into member retention.

ANALYSIS AND RECOMMENDATIONS

After obtaining information and insight through a baseline study, an online survey, and personal interviews, I was able to analyze my findings and develop recommendations for future programming. It is my hope that by better meeting the needs and expectations of our members and by drawing in new class-taking members, we will continue to see strong trends in membership retention.

Based on the data I pulled for the baseline study, paired with survey results I have four general recommendations for future programming:

1. Continue to offer classes at a variety of times on a variety of different topics.

With so many conflicting schedules, needs, and interests (Survey question 9), diversity seems to be the key to filling classes. As we continue to send out our regular course evaluations combined with class cancellations due to low enrollment, we will begin to build a larger understanding of class time preferences. We won't be able to predict people's preferences, but hopefully, with good record keeping, we can begin to see what works and what doesn't. Survey results suggest that diversity might be our secret weapon (Survey question 6) to filling classes and engaging new class-takers.

2. Increase marketing efforts for continuing education programs.

In reviewing the open ended responses of question 9 we see a number of members who were unaware of Continuing Education programming at the Arboretum. Coordinated and consistent efforts between marketing, membership, and continuing education will ensure that new and renewing members will become aware of classes.

3. Continue to look for new ways to engage our largest membership categories.

Some of our most populated member levels (including family memberships) are actually the least likely to register for classes. Combined with the responses to questions about barriers to class-taking, I recommend offering inexpensive one-time classes for families in addition to some of the current Growing Minds classes.

While we should continue to reach out to these membership categories, we need to keep in mind that families will always be a difficult group to formally engage. Based on the answers from the survey, we see that young families are short on time and money, and often have their priorities elsewhere. With this group, I think it's important to offer classes and programming for people who are interested, but perhaps we should direct more of our energy to engaging this constituency in less formal ways such as the Discovery Table. I would recommend an emphasis on these drop-in activities because parents are looking for ways to spend time outdoors in a safe environment with their children.

Another way to engage new members in continuing education classes might be to offer a one-time use coupon for a reduced registration fee (perhaps an extra 10% off of the member price).

4. Continue to focus class-takers and members on the gardens themselves.

All classes should be tied tightly to the mission of the Arboretum and should celebrate and explore the collections, landscapes, and setting we love so much. As shown in questions 15 and 16, people become members because of their love for the Arboretum and their desire to spend time here. When we focus our classes on the Arboretum, we continue to draw people back to the reason they became members in the first place.

What an opportunity for growth with only 10.5% of our memberships registering for classes! These people are already associated with the Arboretum and are invested enough to purchase memberships. With continued research and a keen ear for listening to our membership, we have the potential to continue to evolve our already impressive educational offerings, giving members more of what they love, finding better ways to engage new people, and offering ways for members to reinvest in the Arboretum.