

**MARKETING, MEMBERSHIP, GOVERNANCE and OVERSIGHT REPORT**  
**- Heather Cacanindin 3/1/2018**

**SUMMARY:**

My main goal has always been to deliver a high-quality membership experience and to communicate and market the Society, its benefits, and its publications to a broad audience. In the last year, I have taken on the governance role in addition to previous responsibilities. My role works across five broad areas:

**1) Governance**

Identifying, assessing, and informing the Board of Directors of internal and external issues, trends and risks that may affect the organization. Working with HR and payroll at the Missouri Botanical Garden to provide oversight for financial payments, staff structure, and performance reviews. Providing operational and financial management and oversight. Providing leadership and direction to staff to stay on target and in line with our mission and strategic goals. Analyzing and drafting policies and procedures and ensuring efficient and effective day-to-day operations for the organization.

**2) Communications and Marketing/ Membership Experience**

Coordinating, writing and deploying communications for the BSA and its sections, (conference marketing, member news, renewal reminders, publication releases and marketing emails, fundraising and donor appeals, PlantingScience support, librarian emails). Working with IT to make refinements and upgrades to CiviCRM, our membership database. Managing social media communications and sponsored advertising on Facebook. Ensuring that our members receive the highest value and relevant benefits for their Society membership.

**3) Wiley Transition and Marketing the AJB**

Oversight of the publications transition from self-publishing to a new partnership. Weekly conference calls to hammer out the transition details of moving to our new partnership. Working with Wiley to craft marketing messages that will resonate with our members and potential authors. Making the needed adjustments to transfer our member access to a new publications portal. Working with Highwire to obtain all the stored data needed for this transition and to wind down our contract with them that ends October 2018. Communicating with librarians regarding our change in journal publishing and sales to ensure a smooth transition and good relationships.

**4) Administration of the PLANTS grant (\$100,000) in conjunction with the two PIs**

Year 3 of the second PLANTS grant. Managing advertisement, application and evaluation process, and communications and tracking of the selected PLANTS fellows over time, as well as mentor cultivation.

**5) Managing membership affairs for the Society for Economic Botany and the Society for the Study of Evolution**

Working with their officer team, attending Board meetings and conf calls, providing advice on association trends, writing and deploying communications for those societies, marketing their conferences, writing and deploying renewal reminders, and managing their membership database.

## MEMEBRSHIP:

Membership Types												
	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009		
Corresponding	68	68	63	62	62	59	57	57	57	57		
Life	71	69	60	57	54	54	51	53	53	54		
Emeritus	284	281	262	255	240	226	250	219	212	212		
E Family	38	38	36	36	34	32	0	30	30	27		
Retired	44	53	49	52	48	34	31	33	26	30		
R Family	0	4	4	2	2	2	0	4	6	4		
3 Yr Professional	184	178										
Professional	849	1050	1305	1367	1379	1450	1430	1413	1400	1562		
P Family	126	145	173	186	209	217	234	233	231	255		
CC Professional	25	44	46	41	40	42	49	44	31	20		
CC Family	2	4	2	4	8	12	0	0	5	5		
PostDoc	111	173	207	183	205	199	217	186	149	88		
PD Family	0	1	2	5	8	11	0	10	8	5		
Student	449	630	751	818	784	801	841	900	833	816		
S Family	1	3	5	6	18	13	10	9	9	19		
S Chapter	27	37	41	24	36	46	0					
K-12 Teachers	11	13	19	21	23	28	51	68	56	60		
Affiliate	22	33	38	35	40	52	48	45	40	32		
Associate	2	5	3	2	15	25	31	23	19	20		
Amateur	45	64	58	54	71	74	64	59	71	54		
Developing Nations	33	24										
	<b>2392</b>	<b>2917</b>	<b>3124</b>	<b>3210</b>	<b>3276</b>	<b>3377</b>	<b>3364</b>	<b>3386</b>	<b>3236</b>	<b>3320</b>		
Professional	1835	2132	2209	2250	2289	2338	2319	2282	2208	2319		
Student	477	670	797	848	838	860	851	909	842	835		
Other	80	115	118	112	149	179	194	195	186	166		
	<b>2392</b>	<b>2917</b>	<b>3124</b>	<b>3210</b>	<b>3276</b>	<b>3377</b>	<b>3364</b>	<b>3386</b>	<b>3236</b>	<b>3320</b>		

Membership for 2017 dropped significantly. We are down 7% on where we stood at the end of 2016. We anticipated a drop, but not quite this large (200 members). There are many factors at play here, with the biggest one being the competition we experienced for the BOTANY meeting in 2017. If members do not attend the annual meeting, they are much less likely to renew their membership. In 2017, our meeting attendance was down 30% due to competition with the IBC, Evolution and Plant Biology conferences.

I am very much concerned with student memberships, which have seen the largest drop. For 2018, we lowered the dues for Student members to \$20, but so far this has not had any affect on raising our student membership numbers.

On a positive note, the 3-Year Professional membership, which was asked for by our members in 2016 and provided in 2017, had an uptake of 13% among our Professional membership. These members have already paid their membership dues for the next two years. We also saw an increase in those choosing Lifetime memberships. We may want to consider adding a multi-year membership option to other membership categories like Students and PostDocs.

For 2018, we are 50 members ahead of where we were last year at this time.

Much of my time this last six months has been devoted to oversight and aiding in the steps to transition our publications to our new publishing/marketing partner (Wiley) which took time away from membership marketing and developing new and enhanced benefits for members. I have been in touch with our Student Reps and we are brainstorming ways in which to better attract and RETAIN our student members.

## **HIGHLIGHTS from the Six Months:**

This has been an incredibly busy and challenging year with many changes and transitions taking place. Our entire staff team has stepped up to deliver for the Society. We stepped up when a fellow person on staff left early in the year. We dealt with the retirement of our executive director at a time when we were switching our publications program from self-publishing to partnering with a commercial publisher (something we resisted for years). We all contribute to the success of each aspect of the Society, whether it is packing seeds and T-shirts for the PlantingScience outreach program, learning new financial management skills or database reporting, supporting the Conference by working the registration desk and managing student volunteers, or providing direction and expertise to our contracted scientific society partners.

In the later half of the year, as I took on the role of Interim Executive Director, the pace of my position picked up drastically. We have implemented some financial changes with monthly reconciliations and new contribution reporting mechanisms. I revamped the way financials are reported to the Board and am still tweaking those reports, which I plan to deliver quarterly to the Board. It has been challenging to cover the membership and renewal season while also managing the transition of our publications and the workings of all of our staff areas.

- **Working with Publications Team on the Wiley Transition**

I have been involved in the weekly conference calls as we worked our way through transitioning all of our journal content to our new publishing partner and worked through issues with new protocols and procedures with the Wiley team. We now have a new member portal to access all BSA publications on [www.botany.org](http://www.botany.org) and have begun the marketing rollout to members, authors, and the broader scientific public involved in ecology, evolution and the plant sciences.

- **International Outreach and Coordination**

- Managed the IBC Grant applications and award process from NSF to bring grad students, PostDocs and early career professionals to the International Botanical Congress in China
- Coordinated and hosted a joint reception of the BSA and the Chinese Botanical Society at the IBC where we honored new Corresponding Members in attendance
- Working with our International Committee and Board to sponsor a social event and 4 Pan-American Scholar awards at the Latin American Botanical Congress in Oct 2018
- In discussions with Wiley regarding international presence of our publications at meetings outside the US

- **Involvement with the Plant Science Research Network**

BSA has a volunteer representative (Michael Donoghue) on the PSRN. I have participated in meetings and calls for the group. Allison Miller also attended a PSRN meeting on our behalf. The PSRN is making progress and we are there to ensure that the interests of our members are represented. BSA members have been part of the workshops involved in this effort. The PSRN is currently refining (with input from the partner organizations) the National Plant Systems Initiative document, which our Board and section chairs have reviewed. PSRN is holding a meeting at the same time as our Board meeting this March.

- **Improving the value of BSA membership**

- Organized the videotaping of more than 60 talks at the conference using student volunteers and put them into our growing video resource library on botany.org; made a few talks freely available for marketing purposes – these same plans are in place for BOTANY 2018
- Investigating online platforms and ListServes to use for member connection, collaboration, document-sharing, discussions. Have proposals from two options (Higher Logic - to implement a platform just for BSA members, and ASPB to collaborate on Plantae an open online network for all plant scientists)
- **Fundraising and Finances**
  - Worked with our Financial Manager and accountants to move investment tracking from the technicolored spreadsheet method to Quickbooks
  - New process of monthly reconciliation between our online membership/donation system and our bank accounts/Quickbooks; donations are now transferred monthly to the investment account
  - Worked with IT to refine our online donation system so that donations and gift memberships can be made outside of renewing membership
  - Planned and launched our first #GivingTuesday (November) fundraising. In two days we received 54 gifts, raised \$1760 total with \$1065 of that for the Endowment.
  - Worked with our DaL of Development on a year-end fundraising effort for the Past President's Fund and have raised \$23,475.
  - Endowment donations since October 2018 stand at \$17,836.
- **BSA's monthly e-newsletter (*Membership Matters*)** continues to average open rates between 34-38% which is quite high (non-profit industry average open rate is 20%). I prepare this newsletter in conjunction with our BSA staff with input from BSA officers as needed.
- **Facebook fans have increased 19% in the last year to almost 25,000 followers**  
We feed the FB page 2-3 times per week with relevant research, news, and member acknowledgements.
- **SSE and SEB Management**
  - Worked with SSE leadership and our IT Staff to transition SSE membership data to new membership database CiviCRM
  - Membership increase of 5% for SEB and 6% for SSE

#### **ISSUES FOR 2018 and BEYOND:**

This year will be another year of transition. Partnering with Wiley will allow us to stay on top of emerging technologies, offer the best user experience for our authors, increased global brand awareness and exposure for our publications and guaranteed, sustained income for the Society. This is a smart move and I look forward to working with Wiley's marketing team on new initiatives that help us reach a broader audience. Staff bandwidth has been challenged this last year during this time of transition. We look forward to getting fully staffed again in 2018. Offering resources to our members for their use in between annual meetings is key to our future growth and vitality as a scientific society. I do believe a strategic planning session is needed in the next year after the Executive Director position has been decided upon.

- Strategic planning is on the horizon. The last plan was prepared in 2014 and it was more of a tactical list than strategic goals. We will need to work with together to create a robust membership survey to scan our environment and gather the data we need to inform our strategic planning process.
- Carefully consider whether BSA wants to continue offering its staff services for a fee to help manage other scientific societies
- Accounting adjustments including staff review, tracking and accurately coding income and expenses to increase ease and accuracy of financial reporting
- Creating more sophisticated, automated, and targeted marketing including an onboarding strategy with automated emails for new members (quarterly emails and surveys)
- Mentoring and networking programs for our members beyond PLANTS
- Move the SEB membership information to a new database - CiviCRM (this summer)
- Produce a new BSA video highlighting the conference and the profession (2018)
- Begin hosting seminars/webinars for BSA members as a professional development, skill-building, and networking opportunity