Increasing Engagement
How to Keep Members Active When Your Issues Aren’t Hot

INCLUDES EXCLUSIVE CQ ROLL CALL SURVEY RESULTS
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About The Survey:

CQ Roll Call’s online survey was unscientific, but more than 330 people offered their opinions. It was conducted from May 26 to June 2.
When it comes to advocacy, keeping members engaged is the single largest challenge that associations face this year, according to a recent survey by CQ Roll Call that asked association and advocacy professionals to discuss their business. It’s bigger than the budget or a lack of resources. It’s tougher than getting elected officials to listen.

Like political campaigns, advocacy is now an “always on” activity. The majority of associations have programs that reach out to members regularly in an attempt to move them to action. Yet the problems faced by these associations were plain to see, with many in the survey describing a scene in which they struggle to activate a membership of busy professionals who can be difficult to motivate without some looming crisis.

For starters, associations are utterly dependent on timely issues for their advocacy. Roughly three out of four say that members are most likely to participate in advocacy when the association calls out an issue before Congress or an agency. An equal percentage say that they have trouble getting members to take action without one. Yet Washington productivity is hardly setting records, and issues that are truly moving have become a relative rarity.

In addition, associations are equally dependent on email for this work, with three out of four saying it’s the primary means of engagement (it even trumps lobby days and other events). Yet it is difficult to cut through the noise in a world where inboxes are perpetually full. Clearly, action alerts and regular newsletters only go so far.

The result is a crisis of confidence, with many advocacy professionals unclear whether their members will respond when there is a major need. Fully 75 percent said it is somewhat difficult or very difficult to get members to participate in advocacy. Fifty-nine percent said they are only somewhat confident that they can
get members to act when needed, and 17 percent said they were not very confident at all. Ten people even checked a box saying it was a “roll of the dice.”

One person who took the survey described the difficulty of activating members eloquently: “We can explain the need, and they will acknowledge the issue. Unfortunately, the disconnect happens in the call to action. We make the call, but action is slow or absent. It feels like a general reluctance to stretch beyond the familiar, and to advocate for one’s profession and livelihood.”

But there are organizations that have found solutions. Some have put training programs in place, creating an infrastructure that allows members to get more active in structured ways. Others have created grassroots programs that increase advocacy out in the states, or that rely on peer-to-peer messaging to increase engagement.

CQ Roll Call reached out to more than a dozen advocacy professionals who have found ways to engage their members even when the issues they care about are buried on Washington’s priority list. We also reached out to experts at industry groups like the Association of Government Relations Professionals and the American Management Association, and at companies like Higher Logic and Informz. The result is a list of practical ideas, some of which can be pursued immediately and some of which are long-term solutions. All have been put into practice by associations large and small. We hope that you find them helpful.
Branding Campaigns as Advocacy

It’s what all government relations professionals dread: you have a fly-in coming but nothing on the Congressional calendar. Or your association’s major meeting is approaching, with no hot issues on your advocacy agenda.

What do you do to show your members and prospects your association is relevant? One strategy is to bring your advocacy campaign up a level and focus on the bigger picture. Rather than pushing individual issues, talk about your association as a whole and your brand proposition.

The “brand campaign” is a great way to sidestep the need to constantly have one or two hot issues and create an advocacy campaign around who you and your members are.

A brand campaign for your association can go beyond the one-pagers and white papers to convey an impression about your organization. The key is to think about your membership, and what it contributes to a major societal problem or society as a whole. Then, you combine those two elements to tell a story.

That story can be told with a massive expenditure to saturate the airwaves and cover billboards across Washington. Or it can be as simple as creating a hashtag and asking people to use it to submit their stories and photos.

How is this an advocacy strategy? By creating a brand story and asking your members to tell it, you immediately create a structure through which you can define any issue.

For example, the last thing Congressional staff were worried about in the wake of the Great Recession in 2009 was whether CEOs and government employees could travel to Las Vegas. But that was exactly what kept the leadership of the U.S. Travel Association up at night.

With budgets shrinking, private corporations and associations were holding fewer meetings and directing them to smaller cities. Simultaneously, scandals surrounding federal spending on business conferences (specifically in Las Vegas) prompted the government to push for stricter limits on when and how employees could travel. During a time of high unemployment, these were not major concerns for policy makers. But they were big for members of the USTA, who depended on travel for their business.

Working with other associations in the meetings space, USTA created a brand campaign called “Meetings Mean Business.” The goal was to show the value of face-to-face meetings, which is what USTA’s members facilitate. The campaign featured media and statistical components, but all components were squarely focused on policymakers at the state and federal level. Using statistics and personal stories from members, the campaign allowed USTA to advocate for its priorities in a wider context, and insert them into the major debates taking place.

Another example is the joint venture between the National Apartment Association and the National Multifamily Housing Council, called “Apartments: We Live Here.” Again, the campaign uses statistics and stories to paint a bigger picture of the industry, which is quite useful to policymakers. The campaign site has an interactive map that shows statistics on apartments, customizable by state, as well as a calculator to determine the impact of the industry in different locations. The site is simple, easy to navigate, and can be used in a host of debates currently before Congress, including tax reform (a priority for the Council).

How you design your brand campaign is important, and it doesn’t always require massive spending on ads or websites. For example, AARP took to Twitter last month to build a successful brand campaign. Using the hashtag #DisruptAging, CEO JoAnn Jenkins highlighted news stories about AARP-eligible individuals that are doing amazing things. While this does not directly advocate for a major issue, it builds a network of stories and information that can be used as an advocacy campaign itself or to relate AARP’s lesser issues to major debates in Congress.

Robert Hay Jr., a Certified Association Executive, is Executive Director of the Association of Government Relations Professionals.

Tips for a Branding Campaign

Brand campaigns are a great way to rally your membership when your top priorities are on the back burner. Here are some tips to help you start:

• Know your membership and how they contribute to the greater good. Don’t limit yourself to your organization’s parochial concerns (“widgets are good”) but think of larger societal issues (“the widget industry is solving today’s major problems”).

• Tailor the media for your messages. If you can afford a hashtag and a YouTube channel, that can be incredibly effective. But make sure the media you use is the right channel for your audience and your members.

• Be relevant and creative. The Apartments: Where We Live campaign not only uses customizable statistics, but created a series of ads showing everyday people as renters, which can be used in multiple ways.

• Always connect it back to your core brand and have a way to tell member stories. Hashtags, videos or even written testimonials can all work, depending on your campaign.
Increasing Engagement

How to Keep Members Active When Your Issues Aren’t Hot

Could be a lot more active

44%

Reasonably active

29%

Not very active

14%

Extremely active

10%

Few signs of life

3%

Creating Infrastructure for Engagement

The American Academy of Neurology faces the same challenges that many associations face: a very smart and capable membership that is also very busy and very engaged elsewhere, be it practicing medicine, teaching or doing research.

But the academy has found a way to get members involved, and not just superficially. The Palatucci Advocacy Leadership Forum was founded to foster an interest in advocacy and offer training.

Every year, 30 members are selected to attend an intensive weekend program. Invitations are made through an application process, ensuring that members want to be involved. The academy and its sponsors pay the expenses, eliminating some of the barriers to participation. The result is consistent infrastructure that encourages a small group of members to get involved in big ways, whatever the political climate and the issues facing the academy.

“We teach them how the process works, how they can be effective and how they can get an action you want to achieve done,” said Rod Larson, the organization’s chief health policy officer.

The strategy is used by other organizations as well. The Alzheimer’s Association, for example, recruits “grasstop ambassadors” who have personal experience with the disease, and assigns one to every member of Congress. They commit to a year-long stint as ambassador and accept specific assignments, often working with legislative staffers in a district office. During that time, they are continually updated on developments in research, policy and funding related to the disease. But it’s that personal connection that often makes the difference.

“The personal story is the most powerful tool that an advocate has,” John Funderburk, who initiated the association’s structured advocacy program, told CQ Roll Call’s Connectivity blog.

At the American Academy of Neurology, officials say the results of the Palatucci forum have been profound when it comes to engagement. The academy now has an ever-growing pool of trained advocates to draw upon when needed. But the real results are in the members themselves, Larson said.
“Physicians who go through the program become a lot more attached to their academy,” he said. “They end up serving on committees, attending Hill events and donating to our political action committee.”

Moreover, those 30 often recruit others to become more active, Larson said. And they stay involved with the forum, which brings graduates back every year to serve as teachers and mentors. “They become absolute cheerleaders for their academy. They build a network. That 30 becomes 50 very quickly. They become almost evangelists.”

The academy has also been careful to keep the program manageable. While it may be tempting to try to hold it two or three times a year, Larson said the costs and logistics could be formidable, and they don’t want quality to suffer. As he put it, “We don’t want to mess with a good thing.”

**Getting Local to ‘Tell Your Story’**

When there’s no major battle to fight in Washington, another tactic associations use is to build relationships with state and local officials, leveraging the work the associations do in communities. One good way to do that is to invite officials in to see it for themselves.

“We urge our associations to tell their story,” said Jim Clarke, senior vice president for public policy at the American Society of Association Executives.

Few are better at this than the YMCA, which has roughly 2,700 facilities nationwide that are capable of hosting a visit from a school board member, a city councilwoman, a state rep, a member of Congress or anyone else who might be helpful.

“We very purposefully talk to the Ys about the advantages of building those relationships, even when there’s not a fire in the kitchen,” said Neal Denton Sr., a senior vice president and chief government affairs officer.

“Some of the very best messengers are members of the Y in any given city,” he said. “This is not rocket science. It’s the same process you use when you bring in a new board member or a new donor.”

The mission is to communicate that the YMCA is less a “gym and swim” than it is a community organization, providing everything from daycare and summer camps to food programs. To do this, it encourages local Ys to bring in officials of all stripes to play with children, participate in a food program or take part in other events. One official in Pennsylvania found himself speeding down a zip line.

__EXCLUSIVE CQ ROLL CALL SURVEY RESULTS__

| How difficult is it to get your members to participate in advocacy efforts? |
|-----------------------------|-----------------------------|
| Somewhat difficult          | 56%                         |
| Not that difficult          | 21%                         |
| Very difficult              | 19%                         |
| Pretty easy                 | 3%                          |
To facilitate the visits, the YMCA has setup a 20-page toolkit, complete with sample letters, press releases and tips, that help local chapters organize these meetings. It openly encourages its chapters to meet with elected officials. “Building and maintaining relationships with public officials should be something you do year-round to tell your Y story, show your impact and help advance policies that strengthen communities,” the toolkit says in its very first paragraph.

Denton said public officials almost always warm to the experience. “They end up asking that magic question, the question we love: ‘how can I help?’” he said. “You never know how the answer can help more people in your community. Once you generate that question around his table, obstacles peel off.”

He also said the tactic works extremely well for the YMCA, because it builds support in all corners of government. Local officials often move to the state level, and state officials transition to the national stage. When issues pop up that could impact the organization, locally or nationally, the YMCA has friends.

“Elected officials know what goes on in the building, they know what the story is and they know the benefits,” he said. “When some elected official paints a picture that is unflattering, you have an advocate in that room to tell your story.”

Of course, the YMCA is not the only one to embrace the tactic. Many organizations, whether they are companies, associations or nonprofits, use site visits as a means to engage members and officials. At the National Head Start Association, for example, they often invite officials to come to their centers and read to children.

“We try to get local officials into Head Start centers as frequently as possible,” said Sally Aman, a spokesperson for the association, adding that when Congress is in recess, “it’s the perfect activity for them when they’re back to their districts.”

Like the YMCA, Head Start sends materials to local offices that help them set up visits. “We work with very closely with our centers in the field,” Aman said. “Our charge as an association is to support them as they advocate for Head Start.”
Using Communities Beyond Major Issues

Your community needs to stay in touch, whether or not there’s legislation on the floor or a new issue looming.

Your association’s members will stick around, collaborate and work on your behalf if it’s easy and interactive for them. Whether or not you’re in crisis mode, an active community will always provide compelling content and increase engagement.

Online community platforms and advocacy campaigns have this major component in common: engagement. There have been several studies showing correlations between engagement with an association’s online community and positive things. Those who engage in the community are more likely to renew their membership, attend meetings, purchase products and recommend the organization to a friend.

Consider the alternative. Members will always talk. If it’s happening outside of your control or domain, you may be unaware until it’s too late. If communications are happening within your online community, you control the message. You stay ahead of any problem and ensure it’s addressed before becoming an issue.

Get your message out there
Online communities can bridge the communication gaps among members and between groups. When it comes to a policy question or state-side issue, the community’s discussions and library resources can be easily accessed and shared. This mode of communicating and sending messages becomes a reliable source to help spread the word and build support.

Use gamification to improve retention and satisfaction
Gamification is another strong tactic. Reward your constituents for taking action on campaigns or contributing content with digital recognition, such as points, ribbons or profile badges. You’ll have the opportunity to acknowledge and thank supporters while encouraging them to continue supporting initiatives.

Encourage leadership participation
The Community Roundtable’s 2014 State of Community Management report showed that, among communities with formal leadership programs, 71 percent can measure the community’s business value. In 58 percent of the best-performing communities included in the research, the organization’s CEO is an active participant.

Association leaders and their online communities should mix. Executive participation affects the success of an online community, and leaders should be both champions of the platform and disseminators of useful industry content. We can use the analogy of an annual meeting: in what scenario would it be acceptable for an organization’s CEO not to attend the event?

High Logic is an industry leader in cloud-based community platforms, with over 25 million engaged members in more than 200,000 communities.

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Can you get your members to rally when it matters? They will if they’re engaged.
Peer-to-Peer Outreach

One way to increase engagement is to focus on changing the messenger, rather than the message. That’s exactly what the American Physical Therapy Association did.

Using video, the organization gathered testimonials from active members that explain the value of advocacy work. This means that peers—rather than the association itself—are making the pitch, on a very personal level.

“We want to encourage others to get involved in the legislative political process,” said Michael Matlack, director of grassroots and political affairs. “The peer-to-peer conversation makes a big difference rather than me or someone else relaying the information.”

In one video, therapist Hope Engel tells her colleagues that advocacy “is part of the whole package of what we do.” Physical therapist Matthew Mesibov said, “I’ve literally seen through speaking with our legislators and their staff ... that legislators made decisions to sign on and cosponsor bills that were important to us. That’s powerful.”

Matlack says hearing from peers can have a strong impact on members who may not be involved in the association’s grassroots advocacy. “They may see a video and think, ‘if my colleague is doing that, I should think about it too,’” he said.

Of course, there are also other associations that have adopted a peer-to-peer approach to engagement. The American Speech-Language-Hearing Association has adopted a similar strategy.

“When you’re asking people to do something, member-to-member is best and most effective,” said Ingrida Lusis, the association’s director of federal and political advocacy.

And both organizations say video is the right medium.

“It’s easier to listen to a two-minute clip than to read through an issues brief,” Lusis said.
The Advocacy Nurture Campaign

Much like the “standby mode” on electronic devices, advocacy groups can find themselves in a state of wait. When an electronic device is in standby mode, it is not actively running but continues to receive power—enough to keep the software running and ready for action. Advocacy groups have the same basic need to stay connected to the power source, charged up and ready.

And that’s where the advocacy nurture campaign is extremely valuable.

A advocacy nurture campaign is a series of emails designed to effectively build and strengthen rapport and relationship with your members. Using marketing automation technology, you can plan and set everything up ahead of time and then let it run according to the desired email cadence. This saves time and produces a more cohesive campaign, rather than creating content for each email as you need it.

Nurturing begins at the onset of the relationship, and the most efficient strategy is to start with an automated campaign for new members. The campaign should include a series of purposeful communications sent over the first few weeks of a membership.

When crafting the campaign, identify what your members need from you and what you need from them. These are items like member login information, contact information, an event schedule or networking and volunteer opportunities.

It’s important to lay a solid foundation with your members, and it’s especially important to have a plan for engagement during the “quiet times” when issues are not looming. The key messaging during this time needs to speak to the heart of the audience and the importance of the critical work they do.

Here are some suggested themes to build into your campaign.

**Affirm and Appreciate**

Express how great the need is for their continued support. Your organization could never accomplish all it does without their help. Saying thank you is often overlooked in our business, but it is still one of the most important two words for advocacy partners to hear.

**Celebrate the Wins**

Share real stories of the short-term and long-term impact the group has had on policy. Your members can be change leaders that use their voice and influence to help shape the future. You can energize them by reflecting on the amount of positive change that has already taken place.

Consider creating an accomplishment timeline or infographic to promote and recognize your accomplishments. Solicit and promote testimonials as a means to putting a face on the issues. There’s no motivation as powerful as knowing that you have made a difference.

**Expand the circle of Influence**

Build a sense of community. Provide opportunities for your audience to give feedback, share experiences and communicate on social networks. Make sure members are aware of—and taking full advantage of—the networking opportunities available to them. Equip them with pertinent information and promotional content to enable them to promote the growth of your organization.

Developing a one-to-one communication style with your advocacy group is essential. This can be accomplished by knowing your audience well, including their motivations, challenges and expectations. With that knowledge you will be able to build rapport and develop strong and impactful relationships that result is increased engagement.

**Vivian Swertinski is Senior Digital Marketing Strategist at Informz, which offers an email marketing platform, marketing automation tools and expert services to more than 1,100 nonprofits and associations.**
### EXCLUSIVE CQ ROLL CALL SURVEY RESULTS

**When it comes to advocacy, what are your members or supporters most likely to do?**

(Click all that apply)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Write an email to a public official</td>
<td>81%</td>
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<tr>
<td>Sign a petition</td>
<td>40%</td>
</tr>
<tr>
<td>Make a phone call to a public official</td>
<td>36%</td>
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<tr>
<td>Take to social media</td>
<td>36%</td>
</tr>
<tr>
<td>Attend an event</td>
<td>29%</td>
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<tr>
<td>Lobby public officials directly</td>
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<tr>
<td>Recruit other supporters</td>
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<tr>
<td>Take a pledge</td>
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<tr>
<td>Other</td>
<td>9%</td>
</tr>
<tr>
<td>Create a testimonial</td>
<td>8%</td>
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### Find an Issue—Any Issue

Of course, there are some who argue that you simply need an issue to properly get members engaged in advocacy. And the survey numbers say it is certainly easier.

“With members, there’s no end date—there’s always an ongoing campaign,” said Rick Podliska, deputy director for government relations at the American Motorcyclist Association. “We’re always finding ways in the regulatory process or a bill to get these guys engaged. If we go radio silent, they think the issues are fixed and addressed. So we don’t go radio silent. We’ve got to keep these guys engaged.”

The association has more than 200,000 members and a subscription list that is even larger. And they’ve come a long way. In 2009, the list numbered less than 10,000, Podliska said. Part of that success is making sure that members always have relevant issues to chew on.

“You can always find a bogeyman,” Podliska said.

The organization might highlight an article that has faulty information. Or it might reach into the regulatory process. Or it may call attention to a bill that could impact riders.

“You know [the bills are] not going anywhere, but you let the members know,” Podliska said. “It can always get stuck into a bill that does move.”

The motorcyclists are not the only ones who think that way. “All things being equal, having an issue really does help,” said Tom Dobbins, president of the American Composites Manufacturers Association.

“If you don’t have an issue, you can manufacture one,” he added. “If you don’t have a threat to your industry, create some opportunity.”

One favorite tactic is to try to add language favorable to the association to must-pass bills.

“The question as an association is, can you get or somehow leave your fingerprints, to show members you were there, that you did something for them” he said. “Look for opportunities to put your signature on must-pass bills, something that’s of obvious tangible benefit to members. It’s not a show stopper. It’s not a threat. But it sends the message that we are engaged and working on their behalf.”

Can you get your members to rally when it matters? They will if they’re engaged.
The Long Game: Cultural Change

There are also those who argue that the key to increasing engagement is to make it a top priority in your organization, woven into the fabric of what you do. And that’s not always easy.

“If it is part of the culture of your organization, people on your board should feel funny if they are the only one in the room who doesn’t know their member of Congress or is not donating to the PAC,” Dobbins said. “It puts pressure on them. You make it so that if you are a leader in your industry, you do this.”

Michelle Sara King, an advocacy consultant with almost two decades of experience, said they key is to relate an association’s advocacy work directly to the goals and interests of the membership.

“The key here is to make it relevant to them,” she said. “Relevant, accessible, exciting and interesting. There are a lot of ways to do that. You can show how this improves their business.”

King said that being responsive to members and explaining the value in advocacy—often in one-on-one conversations—can have an impact over time. “As an association staffer, you figure out who your champions are,” she said. “Then, you work together to find the next level of champions.”

Indeed, many organizations have found ways to underline the importance of advocacy in ways that resonate with their members. The National Athletic Trainers Association, for example, recently added an award to its annual lineup that recognizes members engaged in advocacy.

“We want to encourage involvement,” said Mike Chisar, chair of the association’s government affairs committee. “And if visibility is elevated, we’ll be able to do that over time.”

The Educational Theatre Association created a role-playing game to explain how to conduct advocacy, which resonated immediately with its members, many of whom are actors who are used to doing improv.

“So much of advocacy is about telling stories,” said Jim Palmarini, the association’s director of educational policy, adding, “The game has proved to be very popular with members. They immediately recognized its value: You are powerful when you’re prepared.”
Highlighting members who get active can also help a great deal, according to Stefanie Reeves, the founder of Generation Advocacy, a consulting firm that provides advocacy training. For example, if members meet with a lawmaker, it may be worth highlighting in the newsletter or through some other vehicle.

“Giving members who have done something some type of visibility really encourages others,” she said. “They’ll want that same thing, too.”

How you discuss advocacy with members is also key. Being transparent about the length of the process and the need to see it as a long series of steps can also increase engagement. Members who completely understand the journey they are undertaking are far more likely to complete it, even if it goes on for years.

“Let them know that any advocacy takes a considerable amount of time and effort and there will be things out of our control,” Reeves said. “Let folks know it’s a little more complex than the School House Rock video.”
7 Tips to Re-Engage Your Team

When it comes to engagement, don’t just look to you membership. Target your own employees, too.

According to Gallup Poll last year, only 31.5 percent of U.S. employees reported feeling engaged in their jobs. Imagine the increase in productivity if you could inspire people and truly engage them at work. Here are 7 tips to energize your team:

**Emphasize how their work contributes to the greater good.**
People who work for associations are often motivated by the aspiration to help the common good. Your mission and your connection to the community can be a huge motivating factor. Unfortunately, it can be hard to connect the daily grind to a greater cause. Make sure your employees understand how their tasks contribute to the whole and how doing a good job really does make a difference to your overall mission.

**Believe in your people.**
Psychologically, people want to succeed. They want to feel like they did a good job. No one aspires to be mediocre. So treat them with respect and take their concerns seriously; these are often windows into what’s preventing your employees from feeling engaged.

**Acknowledge a good job.**
Celebrating your team's successes on a weekly basis reinforces the behavior you’re trying to foster.

**Back them up and have an open door.**
Research has shown that people leave bosses, they don’t leave jobs. If you’re not working on building a good work relationship with your team, you’re not actively promoting an environment they will want to work in. This includes being available—both physically and emotionally—to help them when they need you.

**Get to know their career goals.**
You may not be able to promote them to the level they aspire to, but you can help them develop skills they want to learn.

**Develop your staff with an eye for the future.**
Even if your employee doesn’t articulate specific career goals, if they feel like they are stagnating in their jobs, they start to worry about their employability. This can eat away at their commitment to your organization. Train your employees, both with formal training and with informal job rotation. Offer them stretch projects that increases their exposure to new and exciting skills.

**Provide wiggle room.**
Research has shown that people prefer to have some control over their work—both how it is achieved and when it gets done. Give them some flexibility to plan their day in a way that makes sense for them. This includes making sure you don’t interrupt their work too often and that you give them the space to complete it.

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