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## CASE 15 Massachusetts Audubon Society

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*A nonprofit environmental organization that operates more than 40 wildlife sanctuaries seeks to develop a strategy to increase the loyalty and involvement of its current members. A task force is focusing on developing a communications strategy for the existing membership, with the primary objective being to increase member value. Findings from a survey of its members may offer some insights.*

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### FROM THE STRATEGIC PLAN 2000–2010

We embrace a vision of Massachusetts in which people appreciate and understand native plants and animals and their habitats and work together to ensure that they are truly protected. From the barrier beaches, heathlands, and salt marshes of the coast; to the vernal pools, red maple swamps, and forests of the interior; all the way to the fens and mountaintops of the Berkshire highlands, the Commonwealth's natural splendor encompasses an abundance of scenic and ecological treasures. But unless and until the public develops a conservation ethic that incorporates a love and respect for nature with a willingness to act on its behalf, we are in danger of losing this natural wealth forever.

Several pairs of cardinals were fluttering around the bird feeder outside the Audubon Shop at Drumlin Farm Wildlife Sanctuary; the scarlet and crimson plumage of the males stood out vividly against the bare trees. Nearby, under the watchful eyes of their teachers and a sanctuary naturalist, a group of schoolchildren were chattering excitedly as they walked down the path toward the enclosure where the farm animals were located.

Despite the chill in the air on this November day, several people were lined up in the reception area to gain admission to the sanctuary. The staff member on duty was explaining sympathetically to two visitors from New York that their membership in the National Audubon Society did not, unfortunately, entitle them to free admission at Massachusetts Audubon Society sanctuaries, since the two organizations had no formal relationship.

Steven Solomon and Susannah Caffry watched the bright red birds from the warm interior of the shop as they put on their jackets. Solomon was vice president of Mass Audubon's resources division and Caffry was director of marketing and communication. They had been meeting with the store manager and were now about to return to the nearby mansion that served as the Society's headquarters. Both were scheduled to participate in a task force discussion of how to develop a new communications strategy targeted at existing members. "The key to success," Solomon told Caffry as they stepped outside, "lies in finding ways to engage our members more actively in Mass Audubon."

### History of The Audubon Movement

In the late 19th century, there were no laws in the United States to control the hunting of birds and animals. Entire species went into decline and two birds, the great auk and Carolina parakeet, were exterminated. Migratory fowl were killed in immense numbers, with hunters traveling to the coastal marshes of Massachusetts from as far away as Ohio.

Among those who spoke up against this slaughter was George Bird Grinnell, editor of the magazine *Forest and Stream*. In 1886, he created the nation's first bird preservation organization, which he named the Audubon Society after the great

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Note: Certain data in this case have been disguised.

American naturalist and wildlife painter, John James Audubon (1785–1851). Within three months, more than 38,000 people had joined the society. But Grinnell was unable to cater to such a large, geographically dispersed group and had to disband the society after a couple of years.

### *The Audubon Societies*

In 1896, two socially prominent cousins from Boston's Back Bay, Harriet Hemenway and Minna Hall, galvanized public support and formed the Massachusetts Audubon Society, which soon had 900 members. Refusing to wear hats and clothing decorated with plumes or other bird parts, they lobbied politicians and newspaper editors for protection of birds. Several months later, the Pennsylvania Audubon Society was founded, and by 1899 another 15 states had established Audubon societies.

In 1901, several local Audubon Societies formed the National Association of Audubon Societies for the Protection of Wild Birds and Animals. Both this association and local societies worked for passage of bird protection laws. An early priority included state bans on selling the plumes of native birds. National legislation included the Federal Migratory Bird Treaty Act of 1918 and creation of a National Wildlife Refuge system where birds would be safe from hunters. Over the years, additional state societies affiliated or merged with the National Association (later renamed the National Audubon Society). By 2001, the Massachusetts Audubon Society was one of only a handful of state societies remaining unaffiliated with the national society.

### *Other Players in the Environmental Movement*

There were literally hundreds of environmental organizations in the U.S., with most being local or regional in nature. Some pursued a broad agenda; others focused on a specific goal, such as the Rails-to-Trails Conservancy, which sought to convert thousands of miles of unused railroad corridors into trails for recreation and nature appreciation. National players included Friends of the Earth, National Audubon Society, Sierra Club, The Nature Conservancy, and the Wilderness Society. Several of these organizations had chapters or offices in Massachusetts. The Appalachian Mountain Club was regional, with chapters throughout the Northeast U.S. By contrast, Mass Audubon, the Trustees of Reservations and MASSPIRG confined their activities to Massachusetts. (See the Appendix at the end of this case for brief profiles.)

Although organizations sometimes worked in coalitions to advocate specific political agenda, they also competed for funding and, to some extent, for members. On occasion, some of them had even competed for the same piece of environmentally sensitive property. The Nature Conservancy protected 17,000 acres (70 km<sup>2</sup>) in the state, Mass Audubon held 29,000 acres (120 km<sup>2</sup>), and The Trustees of Reservations had more than 45,000 acres (180 km<sup>2</sup>). Many other nonprofit organizations operated individual sanctuaries and nature centers or preserved land from development through land trusts.

In the public sector, preservation and conservation agencies included the National Park Service, which was best known in Massachusetts for the 43,600-acre (176-km<sup>2</sup>) Cape Cod National Seashore. The Commonwealth of Massachusetts preserved land for recreational purposes through a number of state parks, and many towns and cities had parks and conservation land trusts of their own. The motivations ranged from keeping attractive vistas and recreational areas out of the hands of developers to preserving habitats for threatened animal and plant species and protecting local water supplies.

### *Evolution of Mass Audubon*

From its initial focus on bird protection, the Massachusetts Audubon Society (MAS) embraced a variety of conservation issues, including the protection of land and habitat, especially wetlands. In 1916, it created America's first private wildlife sanctuary at Moose Hill, 20 miles (32 km) southwest of Boston, later adding many other sanctuaries. It became known for its lectures, guided nature walks, and educational programs for

children. MAS created the first environmental summer camp for children and one of the first natural history travel programs to offer guided nature tours and birding trips overseas. It also opened one of the first stores to focus on natural history merchandise.

In 1952, Louise Ayer Hathaway bequeathed to MAS her Drumlin Farm estate in Lincoln, 15 miles north of Boston. Her will stipulated that this working New England farm was to serve as a sanctuary for wildlife and as a model farm to show young city dwellers how food was grown. The accompanying mansion became the Society's new headquarters.

Under the presidency of Gerard Bertrand (1980–1998), MAS acquired many threatened locations through gift or purchase. It also helped landowners to obtain conservation restrictions that offered tax benefits and then assumed management of their properties. These strategies were made possible by active fundraising and a growing membership.

Bertrand also re-emphasized the Society's historical commitment to the study, observation, and protection of birds. Like the renowned ornithologist, Roger Tory Peterson, he recognized that birds were an "ecological litmus paper." Because of their rapid metabolism and wide geographic range, bird populations were quick to reflect changes in the environment. Hence a documented decline in bird numbers provided an early warning of environmental deterioration. Key initiatives during this period included plans for two urban sanctuaries to better serve the needs of city dwellers, especially urban children. Completion of the new Boston Nature Center, constructed on the 67-acre grounds of a former state mental hospital, was scheduled for fall 2002.

Membership grew from 26,600 in 1980 to 67,000 in 1998, while the area of land protected by the Society rose from 11,600 to 28,000 acres (Exhibit 1). The number of research studies and educational programs also increased substantially. Following the Centennial celebrations of 1996 and completion of a \$34 million capital campaign, Bertrand left to chair Bird Life International; later he was also named vice chairman of the National Audubon Society's board of directors.

### *New Leadership*

Although proud of the amount of wildlife habitat now protected by the Society, some board members and staff were concerned by the absence of a comprehensive plan to guide future direction. They worried that years of rapid growth were affecting Mass Audubon's ability to do the best possible job of managing the many properties it had acquired. As Bancroft Poor, VP–Operations, recalled: "The Society was really stretched by the years of expansion and some of the infrastructure was near the breaking point."

In January 1999, the board appointed Laura Johnson as the Society's new president. Johnson came to MAS from a 16-year career with The Nature Conservancy (TNC), an international environmental organization that maintained the largest private system of nature sanctuaries in the world. A native of Massachusetts and a lawyer by training, Johnson had initially worked on legal issues for TNC but soon switched over

**EXHIBIT 1** Massachusetts Audubon Society: Key Statistics, 1980–2001

YEAR	# MEMBERS (000)	# ACRES PROTECTED <sup>1</sup> (000)	OPERATING REVENUE (\$000)	OPERATING GIFTS/GRANTS (\$000)	ENDOWMENT <sup>2</sup> (\$ MILLION)
1980	26.6	11.6	2,529	362	10.9
1985	31.0	12.4	4,180	490	22.8
1990	48.0	18.1	6,955	1,017	35.2
1995	55.1	23.9	9,042	1,486	57.1
2000	67.6	28.6	13,791	2,584	92.3
2001	65.4	29.1	14,113	2,863	89.2

<sup>1</sup>1,000 acres = approximately 400 hectares (ha) or 4 square kilometers (km<sup>2</sup>).

<sup>2</sup>Endowment is shown at market value except for land, which is valued at either its original purchase price or at \$1 if donated as a gift (based on the Society's intention never to sell).

Source: MAS records

to management, eventually being placed in charge of 12 states as eastern regional director. Reflecting on her time with TNC, she noted that it was a very focused organization with a culture of measurement. In particular, she said, the Conservancy offered a clear and compelling message about its goal of identifying important landscapes for protection, purchasing them, and protecting them. People could readily understand that their donations made a difference and thus feel a part of the enterprise.

A key motivation for Johnson was to be involved in creating an overall conservation ethic in Massachusetts, a task that she believed MAS performed better than any other organization. She was very concerned that modern lifestyles tended to separate people, especially children, from the natural environment. “Kids today are not outside, they’re indoors playing on their computers,” she said, “Or if they are outside, it’s to play in a soccer game. Parents are afraid to let them wander.” In Johnson’s view, simply protecting land would be insufficient if in the future people forgot why the land in question was important, did not feel connected to it, and had no stake in it.

Johnson soon articulated a need to sharpen the Society’s focus and develop a clear sense of direction. Despite a strong “feel good” sentiment towards the organization, relatively few members, she discovered, had a sense of the array of activities in which it was engaged and made assumptions that tended to mirror how they had come to join the organization. For instance, birders thought MAS was about birds, young families from the Boston area thought in terms of Drumlin Farm, and individuals who cared about public policy perceived the Society in terms of lobbying activities on Beacon Hill, site of the Massachusetts state government. So the first question Johnson asked was: “What are we and what do we want to be?”

#### *Developing a Strategic Plan for 2000–2010*

Over a six-month period in 1999, Johnson led and guided a comprehensive strategic planning effort. Its goals were to assess MAS strengths and resources, to evaluate the status of the Massachusetts environment and the impact of widespread changes, and to clearly define critical conservation issues. This assessment would enable MAS to define its own specific role relative to other conservation organizations. McKinsey & Co., the international consulting firm, gave pro bono support to the project.

A strong consensus emerged that biological conservation—that is, maintaining sustainable populations of the state’s native biological diversity—lay at the heart of the Society’s work. In looking toward the future, staff, the board, volunteers, and members reaffirmed their belief, passionately in many cases, that all of the Society’s efforts should be directed toward protecting the nature of Massachusetts. From this belief emerged a common vision (reproduced at the beginning of this case) and a specific role for the Society:

The Massachusetts Audubon Society serves both as a leader and as a catalyst for conservation, by acting directly to protect the nature of Massachusetts and by stimulating individual and institutional action through education, advocacy, and habitat protection.

The phrase, “Protecting the Nature of Massachusetts,” which had been used sporadically up to this point, was adopted as the organization’s signature and appeared beneath the Society’s name on publications and stationery.

The strategic plan identified five major threats to biodiversity: loss of habitat to development; fragmentation of wildlife habitat; disruption of natural ecological cycles and processes through human alterations; the crowding out of native plants and animals by invasive species; and incompatible land use, such as using open space for recreational activities that damaged plants and threatened wildlife.

Following board approval of the plan, Johnson launched an in-depth examination of educational activities at MAS. In addition, the board directed a science review committee, composed of distinguished educators and scientists, to examine scientific activities at Mass Audubon. It also commissioned a study of information technology needs.

**Education Plan**

Discussions with staff members revealed that existing education programs, while high quality and well respected, lacked a common focus and connection to Mass Audubon themes and mission. Johnson acknowledged that the biggest challenge was to identify the most effective ways to use education to stimulate conservation action:

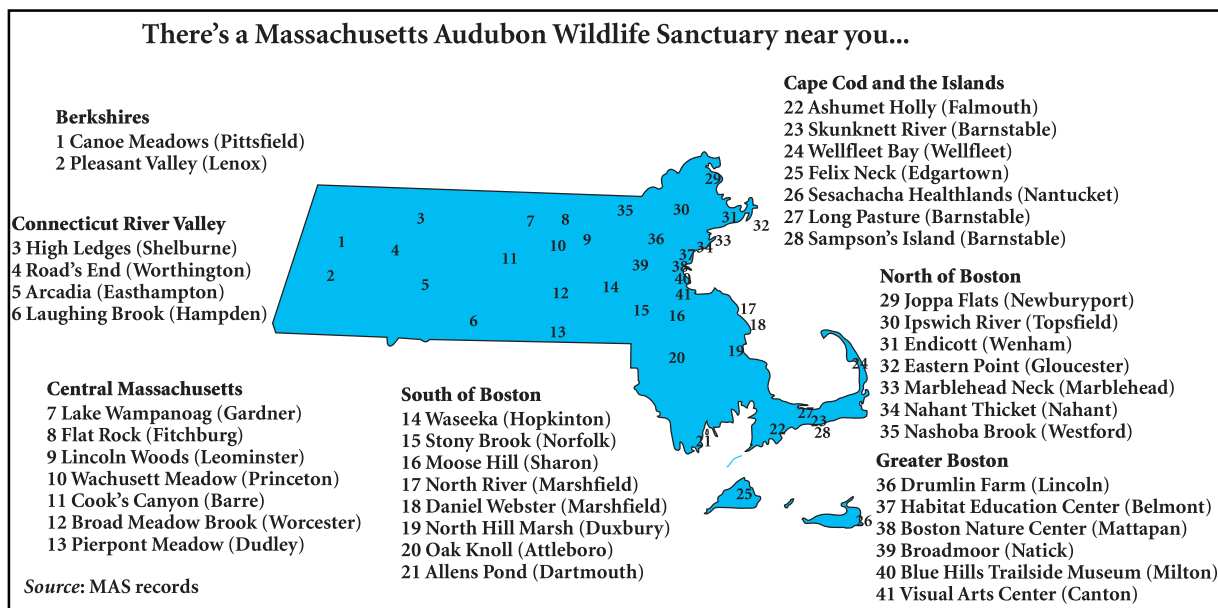
We needed to find the best way to leverage our unique strengths—our sanctuary system, our scientific expertise, our advocacy capability, and our tremendously passionate staff—so that Mass Audubon could be a catalyst for conservation. We do thousands of programs, so there’s plenty of activity to measure and we could say great things in terms of the number of programs held and the number of school children involved. But none of those measures would identify what the activities accomplished in terms of making a difference.

Our teacher naturalists do a wonderful job with our programs, but it’s a very expensive business model. And not every visitor to our sanctuaries wants to enroll in a program for a day or even a couple of hours. So we decided to explore an array of activities to get the message across. Our education director said at one point that we have this cultural bias at Mass Audubon that if we can just open up people’s heads and dump into their heads what we know, they’ll become just like us! But it doesn’t work that way. We now have this paradigm from “caring to knowledge to action.” When people act, that’s the impact.

The education master plan emphasized the importance of creating significant outdoor experiences that might bring about transformations in people’s environmental attitudes and values. Research showed that among children, shared family experiences in nature had the greatest influence in forming their attitudes as adults. To meet varied learning styles, the plan called for a mix of live programs, nature center exhibits, and self-guided trails at sanctuaries, plus opportunities for learning through publications, audiovisual media, interactive pages on the MAS website, and articles in local newspapers.

**Organization**

By this time, MAS was operating 58 wildlife sanctuaries across the Commonwealth, of which 41 were open to the public and 23 were staffed (Exhibit 2). They ranged in size



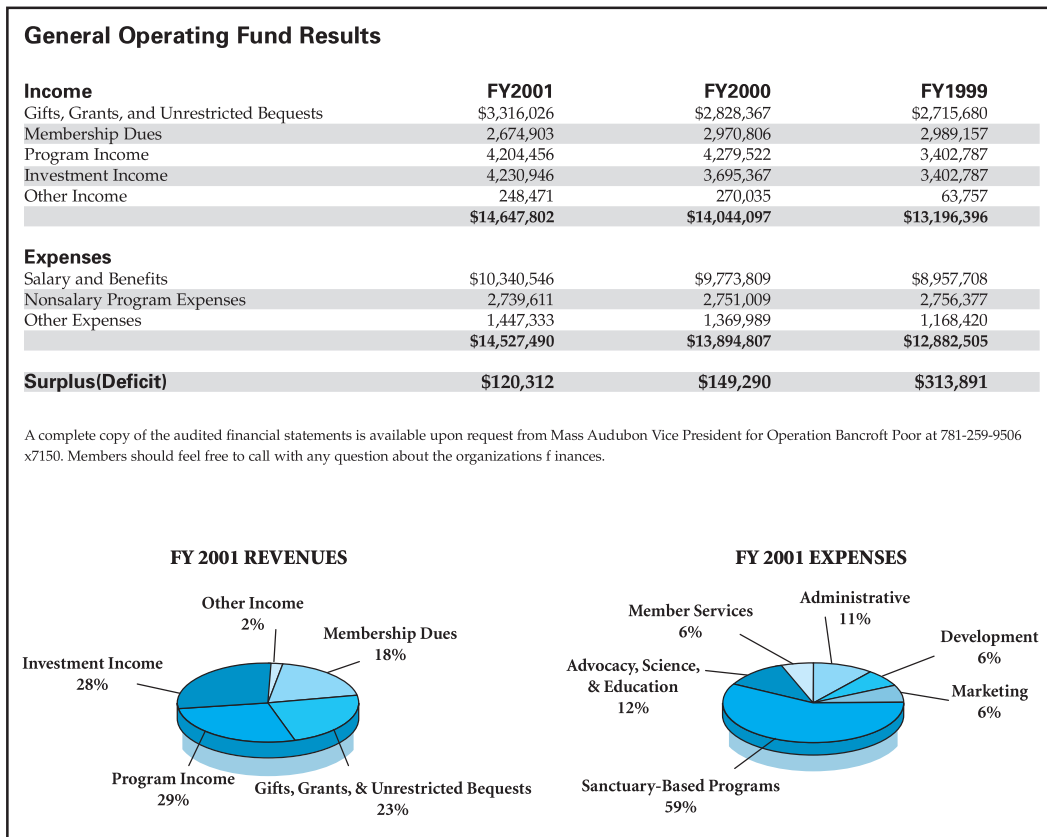
**EXHIBIT 2:** Map of Massachusetts Showing Location of Sanctuaries Source: MAS records

from the 4-acre (1.5-ha) Nahant Thicket, a magnet for migrating songbirds on an otherwise rocky peninsula, to Ipswich River which comprised 2,265 acres (917 ha) of forests, meadows, and wetlands. There were 511,000 visits to the sanctuaries in the most recent year, including some 145,000 schoolchildren. The five most popular sanctuaries—Blue Hills Trailside Museum on the western edge of Greater Boston, Daniel Webster and North River on the South Shore, Wellfleet Bay on Cape Cod, and Drumlin Farm in Lincoln—jointly accounted for 70 percent of all visitation.

Historically, some sanctuaries had operated with a high degree of independence from MAS headquarters, targeting local residents, schools, and vacationers. Their directors were often well known in the communities they served. Sanctuaries were under considerable pressure to increase program revenues each year to help balance the budget. However, the result was often what one director described as “a hodgepodge of programs, many of which have little to do with the society’s mission.”

MAS was one of only two environmental organizations that monitored the Massachusetts state government and promoted a specific environmental agenda. Although some members were invested in these statewide advocacy efforts, others saw Mass Audubon simply in terms of their local sanctuary. Declared one staff member, “In our members’ eyes, we can be as big as a major advocacy issue or as small as a favorite trail.”

For the most recent fiscal year, MAS had an operating income of \$14.6 million and generated a small surplus—as it had done for the past three years. Gifts, grants and unrestricted bequests totaled \$3.3 million and membership dues, \$2.7 million; income from programs and investments each amounted to \$4.2 million; and revenues from all other sources, including profits from the Audubon shop, a Mass Audubon credit card, and the Society’s Natural History Travel program came to \$0.2 million (Exhibit 3). Salaries and benefits accounted for more than 70 percent of all expenses.



**EXHIBIT 3:** Massachusetts Audubon Society: Income and Expenditures for Year Ending June 30, 2001  
 Source: MAS records

**Restructuring**

MAS was governed by a 27-member board of directors, who elected from among their number a chair, three vice-chairs, and a treasurer. Providing additional expertise and support was a board-appointed council, whose 75 members were drawn from across the state, often being recommended by staff members at HQ or the sanctuaries. This governance structure, adopted in 1999, replaced an unwieldy 80-member board with different categories of directors, which lacked clear roles and expectations for its members and had no term limits.

One outcome of the strategic planning process was changes to the design of the MAS organization. The revised structure in place in 2001 consisted of four divisions, each of which was each headed by a vice president reporting to Laura Johnson (Exhibit 4).

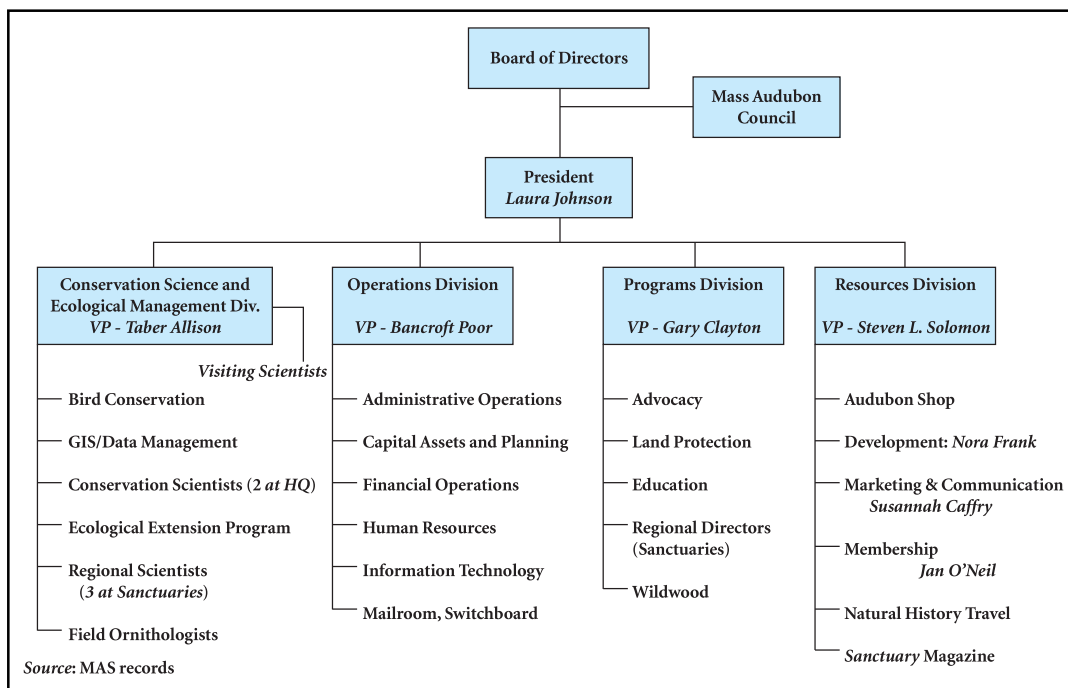
*Conservation Science and Ecological Management* was formerly within Programs, but in response to the findings of the Science Review Committee was established as a separate division in order to sharpen its focus and raise its stature. It included a bird conservation department, GIS/data management, and employed five scientists with responsibilities for each of the three regions, the education department, and advocacy.

*Operations* was headed by Bancroft Poor, chief financial officer (CFO), whose responsibilities included administrative and financial operations, capital assets and planning, human resources, and information technology. The *Programs* division incorporated advocacy, education, land protection, the sanctuaries, and the Society’s overnight summer camp. Finally, the *Resources* division was created to integrate fundraising, membership, and marketing activities and to raise their visibility.

**The Resources Division**

To head the new Resources Division, Johnson hired Steven L. Solomon, previously vice president of resources at the Museum of Science in Boston. Earlier, he had also worked for the Boston Symphony Orchestra and the Museum of Fine Arts, as well as Harvard’s Graduate School of Design. Solomon was attracted by the changes that were taking place at MAS and shared Johnson’s belief that development and marketing should be linked. He declared:

There are a lot of organizations that have separate marketing and development divisions, but in fact they have so many interlocking elements that they need to



**EXHIBIT 4:** Organization Chart Source: MAS records

work closely together. When you're working in development at the level we are, it's based almost entirely on relationships. We want to be like Britain's RSBP [Royal Society for the Protection of Birds], which has a very clearly defined philosophy: "Membership is everybody's job."

The new division included the directors of development, marketing and communication, and membership; the editor of *Sanctuary*, the Society's bimonthly magazine; the manager of Natural History Travel, which organized naturalist-led tours (particularly for birders) to destinations around the world; and the manager of the Audubon Shop.

### Development

Development activities embraced an annual fund to raise unrestricted gifts and capital campaigns to finance specific projects. All members were urged to contribute to the annual appeal; most were contacted by mail although major donors might be solicited personally. Capital campaigns ran over a period of several years. They usually involved intensive advance planning and early solicitation of major gifts. Several campaigns were currently in progress: \$4 million for new facilities at the Wellfleet sanctuary; \$2 million for new information technology; \$6 million for Drumlin Farm; and \$1.2 million for Wildwood, the new residential summer camp.

Nora Frank, director of development, had joined Mass Audubon as manager of major gifts after working in admissions, development, and marketing for a residential school. She believed strongly in the need to keep donors and members involved and informed:

One way to engage people is to let them know what we are doing and what their money is supporting. Right now, we don't have any common vehicle outside of solicitation that tells people what we are doing with their money, applauds them for helping to make a difference, and tells them how they can get further involved. Money comes in every time we use *Sanctuary* to highlight a specific need, even when we don't specifically ask for it. People do want to get involved but we haven't been letting them know what's happening.

### Membership

Jan O'Neil had joined Mass Audubon 18 months earlier as director of membership. "Coming to Mass Audubon was a great opportunity to transition from dealing with many different organizations to focusing on one that I'd been a member of almost my whole life," remarked O'Neil. Her prior experience included 12 years with the New Boston Group, a telemarketing firm that made fundraising calls for nonprofits, many of them in the environmental area. She then spent two years working for Target Analysis Group, which performed detailed analytical studies for nonprofit clients.

O'Neil was a strong proponent of employing reliable data as the basis for planning and evaluating membership and fundraising strategies. As she examined Mass Audubon's membership program, she found there was insufficient information in the database to enable her to create detailed profiles of the membership. The lack of reliable benchmark data meant that it was hard to document what was going on. One of her initial tasks was to find ways to validate which membership strategies worked and which didn't, rather than simply continuing past practices or relying on conjecture. At her previous job, she remarked with a smile, they had a saying, "The plural of anecdote is not data."

As part of the \$2 million technology initiative, some \$400,000 was being invested in new membership and development software, together with associated installation and training. The new software would have extremely robust data storage and reporting capabilities, greatly enhancing the membership department's ability to profile and track members.

Between 1997 and 1999, MAS membership had surged from 54,400 to 67,400 households, spurred by the \$34 million Centennial fundraising campaign, which included a \$400,000 advertising campaign involving radio, billboards, and press. But it had since fallen back to around 65,000 household members. Like many nonprofits, MAS experienced churn in its membership, with about 20% turning over each year. Although that was less than in most organizations, there was still a continuing need to recruit new members. Although regular household membership cost \$47 (\$37 for individuals), new members could join initially for only \$25. Forty-five percent of new members were recruited at the sanctuaries and 42 percent through direct mail solicitation. The balance joined as a result of visiting Mass Audubon's website, word-of-mouth recommendations, or other encounters.

Admission charges to the sanctuaries for non-members ranged from \$3 for adults and \$2 for children up to \$6/\$4 at Drumlin Farm. As one aspect of their pitch, admissions staff were trained to point out the savings associated with joining immediately and then being able to make this and future visits for the next year free of charge. It had proved a particularly compelling sell for families.

Direct mail solicitation involved purchase of mailing lists from brokers or swapping of membership lists with other nonprofits. Some 500,000–700,000 letters were mailed each year, at an average cost of \$0.39 each, and typically yielded a response rate of around 1 percent. A recent mailing came in a colorful envelope bearing the slogan "Coming soon to a neighborhood near you" and a picture of a bird standing on a for-sale sign in open countryside. The letter inside was headed "Massachusetts Is Disappearing!" and warned that every day the state lost 44 acres of land to development. It then described Mass Audubon's conservation, education, and advocacy efforts and promoted the benefits of membership. New members received a welcome package of materials. The unit cost to MAS was about \$3.25, exclusive of any premiums offered as inducements.

O'Neil noted that only 55 percent of first-year members would renew their membership, but this figure compared favorably to comparable national organizations, where renewal rates were typically only 30–35 percent. The estimated annual printing and mailing costs for renewals was \$195,000. Although some members remained loyal for life, a board member with expertise in marketing estimated that the average duration of a member relationship that was renewed after the first year was eight years. In general, said O'Neil, "The longer someone has been a member, the more likely they are to stay a member." Added Solomon: "Members who are happily engaged are much more likely to renew."

At renewal time, members were encouraged to migrate to higher levels of membership: Supporting (\$60), Defender (\$75), Donor (\$100), Protector (\$150), Sponsor (\$250), Patron (\$500), and Leadership Friend (\$1,250). Dues for the last-named category had been raised from \$1,000 the previous year. Members of this group received a number of benefits, including invitations to exclusive events, meetings with Mass Audubon scientists and sanctuary directors, and special outings such as naturalist-led hikes or canoe trips. A small fee was sometimes charged for outings in order to preserve the full tax deductibility of the membership contribution. O'Neil and her colleagues in the Resources Division had been discussing the possibility of developing supplementary benefits for members enrolled in some of the other levels.

In addition to free admission to the sanctuaries, all members received six issues of *Sanctuary* magazine each year, discounts on MAS courses, lectures, programs, and day camps, and savings on purchases from the sanctuary shops. Depending on location, they might also receive newsletters from their nearest sanctuary. O'Neil estimated the annual printing and mailing costs associated with serving members at \$330,000. This did not include the cost of staff time.

Premiums, such as day packs or tote bags bearing the Mass Audubon logo, were often used as inducements to renew at a higher level. The unit cost of purchasing and mailing such a premium was about \$5. Former members were contacted for up to ten years in an effort to get them to rejoin. Exhibit 5 shows the division of membership between the different levels at the end of the 2000–2001 fiscal year. About 70 percent of members renewed at the same rate, 20 percent upgraded, and 10 percent downgraded.

**EXHIBIT 5: MAS Membership by Contribution Level, June 30, 2001**

LEVEL	DUES	NUMBER
Introductory	\$25	12,093
Student	\$20	460
Individual	\$37	9,224
Family	\$47	28,908
Supporting	\$60	6,366
Defender	\$75	2,152
Donor	\$100	3,335
Protector	\$150	1,092
Sponsor	\$250	433
Patron	\$500	205
Leadership Friend	\$1,000	584
Complimentary		520
<b>TOTAL</b>		<b>65,372</b>

Source: MAS Membership Department

### *Marketing and Communication*

Susannah Caffry had worked for Mass Audubon for two years. After leaving college, she entered the telecommunications industry, but found the work increasingly unrewarding. A keen outdoorswoman, she took a three-month sabbatical during which she went on an intensive canoeing trip with Outward Bound. Her experience convinced her that she wanted to work in the nonprofit sector and she accepted an offer from Outward Bound to join their Boston operation as director of admissions, later being promoted to vice president of marketing and public relations. In addition to communications, her work included recommendations on design, scheduling, and pricing of courses and programs.

MAS had earlier employed a director of marketing to manage communication activities associated with the Society's Centennial. As these activities wound down, the position was expanded to include development activities, but the attention given to marketing dwindled due to the more pressing needs of fundraising. The incumbent left at the same time the Resources Division was created and Caffry was recruited by Steve Solomon for the newly defined position of director of marketing and communication.

Caffry said she was attracted to Mass Audubon by the commitment to marketing among the leadership, but had found that not everyone in the organization understood or appreciated the value of a marketing perspective. More than once, she admitted, somebody had told her, "We don't like the M-word!" An important task involved marketing Wildwood, the Society's new summer camp for children. Because some staff members assumed that marketing activities only involved communication tasks such as signage and development of brochures, it took her some time, she admitted, to become involved in decisions on scheduling, pricing, and service features at the camp, all of which she saw as critical to success.

Caffry spent her first few months gathering information and learning how people on the staff, board, and council felt about marketing-related issues at Mass Audubon. She encountered passionately held views that were often widely divergent. There were, for instance, those who loved *Sanctuary* magazine because they saw it as "pure" and free from overt marketing and promotion of Mass Audubon's programs and agenda. Others, by contrast, regarded it as "elitist" and "arrogant," noting that the stories presupposed a level of technical understanding of the environment beyond that held by nonspecialists. Similar variations in viewpoint surrounded the newsletters published by the individual sanctuaries and also the website. Summarizing the situation, Caffry remarked:

There was no holistic approach as to how we were communicating. We had many different vehicles but they weren't held to any consistent message. I found a lot of conflicting opinions concerning the objectives of Mass Audubon's different

communications activities. For instance there was no consensus at all as to what the purpose of *Sanctuary* magazine was. I also discovered that our annual report was not meeting the needs of our development office. This is a fundamental, critical communication effort for nonprofits.

I see our overall objective as bringing together the communications activities without undermining the strengths of the organization—an important one being the commitment and feeling of ownership demonstrated by the sanctuary directors and other program staff.

### Communication Strategy Task Force

Prior to Solomon's arrival, there had been no explicit strategy for coordinating all the Society's communications efforts. As a board member, Alfred (Appy) Chandler had long been concerned about the fragmentation of communication efforts, with each group, such as advocacy, attending to its own portfolio and operating relatively independently of the others. *Sanctuary* magazine, the Society's primary periodical for members, was started, he declared, "not as a mouthpiece of Mass Audubon but almost as an independent journal that would carry articles about the Society's mission as opposed to stories about Mass Audubon itself."

In addition to an in-house publishing effort that produced books and field guides, a variety of staff members across the organization wrote press releases, and there were various public relations efforts by the development office, such as staffing a booth at a flower show or other event. Many of the individual sanctuaries published their own newsletters, but they lacked a coordinated formatting and often failed to convey any real sense of being part of a larger, statewide organization. Chandler promoted the need for an integrated communication strategy to pull all the pieces together, so that the Society could speak with a single voice.

As president, Laura Johnson facilitated a meeting of MAS Council members to define the challenges that the Society faced with regard to its communications strategy. Among the key themes that emerged were a need for greater clarity in terms of "what, why, when, and to whom?" and a sense that the Society was not doing a good enough job of telling the MAS story to either its members or the general public. Break-out reports emphasized the need to find ways to strengthen the "brand" and to understand members and their preferences better. A range of opinions was expressed about *Sanctuary*; while most agreed that it was a high-quality magazine, many argued that it needed to clarify its purpose.

The following month, the board approved creation of a communication strategy task force to work with a consulting firm and MAS staff. Its purpose was to "oversee a review and analysis of current external communication activities and preparation of a communication plan for the Society, including recommendations for long-term strategy." Its scope extended to membership, education, public relations, advocacy, marketing, sanctuary activities, and publications. The task force was composed of board and council members who either had marketing and communications expertise or who represented a consumer point of view. Chandler was named as chair. Commenting on the role of the consultant, EMI Strategic Marketing, Caffry observed:

The consultant was very useful. There were so many sacred cows at Mass Audubon, so many personal feelings, and so many emotions that the consultant could ask questions that I, frankly, could not. There's a certain amount of skepticism in some quarters about the work related to communications and marketing. Not everybody is eager to see change and we have joked that there's a great deal of "anticipointment" related to the communication plan.

### Focus and Objectives

After some debate, the task force decided to focus on developing a communications strategy for the existing membership, with the primary objective to increase member value. This would be achieved through better education of members about Mass Audubon's mission, by engaging them actively in "protecting the nature of

Massachusetts, increasing their support for MAS programs, and growing their financial contributions.”

Additional objectives were (1) to reinforce MAS’s role and positioning as the leader in conservation, environmental education, and advocacy within Massachusetts, thus differentiating it from other environmental organizations; (2) to establish a clear, distinctive, contemporary image for the Society, portraying it as dynamic, current, and important; and (3) to communicate more cost effectively through better use of all available media and channels. The work of the task force included reviewing Mass Audubon’s existing communications, undertaking a competitive audit of those organizations whose activities and appeal overlapped MAS in some measure (see the Appendix at the end of this case), and conducting a detailed survey.

### *Member Survey*

Recognizing that existing knowledge of members’ interests and perceptions was largely anecdotal, the task force decided to conduct a large-scale survey of members. It sought to identify channels for future communications, understand how members perceived MAS, and determine the relative importance they placed on its mission and programs. Additional goals included gauging the degree of membership overlap between MAS and other organizations and determining whether there were meaningful differences between demographic groups in their reactions to MAS communications and content.

Working with the consultant, the task force developed a mail questionnaire that was bound around the cover of an issue of *Sanctuary* magazine and mailed to 62,000 members. More than 8,000 completed questionnaires were returned and promptly reviewed to gather any handwritten comments. Work on manually keying, coding, and cleaning the quantitative data concluded after 4,448 questionnaires, which was viewed as more than enough responses for the proposed statistical analysis.

Following a review of the preliminary tabulations (Exhibit 6), cross-tabs were run to determine how member views and priorities related to member characteristics on a wide array of segmentation variables. One aspect of this analysis involved segmenting members according to their most important reason for joining Mass Audubon. The top three reasons, accounting for 90 percent of respondents, were “believe in the organization and mission” (34 percent), “to protect the environment” (30 percent), and “to visit the sanctuaries” (26 percent).

Analysis showed that, compared to the first two groups, those who joined primarily to visit the sanctuaries tended to be younger and were more likely to have children under 18 in their households. Over 90 percent had visited a sanctuary within the past year, compared to about three-fourths of those in the other segments. They were somewhat less likely to have made a gift to the Society, and a higher proportion of them belonged at the \$47 (or lower) membership levels. Although they were less likely to read *Sanctuary* magazine in depth, they expressed more interest than the other groups in receiving a newsletter that listed MAS programs, classes, and events.

### *Creating a New Communications Program*

After returning to the headquarters building from their visit to the Audubon Shop, Solomon and Caffry joined other members of the task force in the board room. The topic for discussion involved drawing some preliminary conclusions from the survey results and the competitive audit and relating these insights to current communication efforts. Within the next few weeks, the task force was expected to present the board with recommendations for a new communications program.

**EXHIBIT 6: Responses to Selected Questions on Member Survey, September 2001 (N = 4,448)****Why did you become a member of Mass Audubon? Please rank importance:**

	# 1	# 2	# 3
Believe in organization and mission	34%	35%	12%
Protect the environment	30	29	15
Visit the sanctuaries	26	21	25
Participate in programs, classes, events	6	8	10
Participate in birding related events, seminars	3	3	5
Get <i>Sanctuary</i> magazine	1	4	9

**How important are the following aspects of Mass Audubon's mission to you?***(5-point scale: 5 = extremely important, 4 = very important)*

	5	4
Protecting the environment for wildlife	81%	14%
Saving land from development	75	15
Providing nature preserves to walk/hike, enjoy birds/wildlife	60	29
Educating kids about the natural world/environment	60	27
Being an advocate for legal actions to protect environment	55	24

**How often have you visited a Mass Audubon sanctuary or site in the past year?**

Not visited	21%
1 visit	17
2–3 visits	24
>3 visits	38

**What do you know about the relationship between National Audubon and Mass Audubon?**

Same group	1%
MAS local branch	21
Separate organizations	48
Don't know	30

**Do you read *Sanctuary* magazine?**

Yes: 96% No: 4%

**If yes, how frequently?**

Always: 43% Frequently: 27% Sometimes: 18% Skim: 12%

**Do you read the newsletter from your local sanctuary?**

Yes: 78% No: 16% No response: 6%

**If yes, how frequently?**

Always: 50% Frequently: 26% Sometimes: 14% Skim: 10%

**How interested would you be in a newsletter that listed MA programs, classes, and events across the state?**

Extremely: 9% Very: 20% Somewhat: 51% Not at all: 20%

**If interested, how often would you want to receive this listing?**

Bimonthly: 15% Quarterly: 56% Two times per year: 29%

**Do you have an e-mail address for personal mail?**

Yes: 74% No: 26%

**If yes, would you be interested in learning about MA events by e-mail?**

Yes: 46% No: 54%

**If yes, how often would you like to receive e-mails?**

Weekly: 12% Monthly: 61% Quarterly: 27%

**What types of things would you like to be informed about via e-mail?**

Calendars of events at sanctuaries	72%
News about important public legislation/policy in Mass.	58

*(continued)*

**EXHIBIT 6: (Continued)**

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Mass Audubon activities to protect the nature of Mass.	57
Environment-related events in Mass.	55
News about the sanctuaries	48
News about your local sanctuary only	24

**Have you ever visited our Web site?**

Yes: 18% No: 82%

**Have you ever visited other environmental Web sites?**

Yes: 38% No: 62%

**If yes, how often do you visit environmental Web sites in a month?**

Once: 53% 2–3 times: 29% 4–10 times: 13% 11 or more: 5% (Mean = 2.8)

**Would you come to the Mass Audubon Web site to sign up for events?**

Yes: 63% No: 37%

**Would you go to interesting Mass Audubon events more than 20 miles from home?**

Yes: 63% No: 37%

**If yes, how many miles would you travel?**

20 miles: 5% 30 miles: 28% 50 miles: 49% 100 + miles: 18%

**To which environmental organizations do you belong? Are you a member of any of these?**

Mass Audubon	100%	PBS/WGBH	83%
The Nature Conservancy	38	Museum of Fine Arts	42
Trustees of Reservations	27	WBUR	36
Appalachian Mountain Club	18	Museum of Science	25
World Wildlife	15	New England Aquarium	15
National Audubon	15	Franklin Park Zoo	8
Other	27		

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Source: MAS records. Note that certain data have been disguised.

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## Appendix

### Profiles of Selected Environmental Organizations

#### *Appalachian Mountain Club (www.outdoors.org)*

Founded in 1876 and headquartered in Boston, the AMC had some 94,000 members and described itself as “America’s oldest conservation and recreation organization.” Membership cost \$40 for an individual and \$65 for a family. AMC’s mission statement emphasized “protection, enjoyment, and wise use of the mountains, rivers, and trails of the Northeast.” Its 125th Anniversary Capital Campaign had a target of \$30 million. AMC had 12 chapters extending from Maine to Washington, DC, including four in Massachusetts that collectively accounted for some 32,000 members. The Club’s active publication program included *AMC Outdoors*, an award-winning monthly member magazine dedicated to recreation and conservation in the Northeast; *Appalachia*, described as “America’s longest-running journal of mountaineering and conservation;” many trail and field guides; and a variety of recreation-oriented “how-to” books. AMC offered environmental education programs and sought to develop the skills and understanding needed to enjoy, protect, and advocate for the backcountry. Outdoor recreation services included group trips, trail maintenance, and provision of a network of camps, campgrounds, lodges, and cabins, plus a chain of high-mountain huts for hikers and climbers along the New Hampshire segments of the Appalachian Mountain Trail.

#### *Friends of the Earth (www.foe.org)*

FoE was founded in 1972 by a former president of the Sierra Club, who felt that the latter organization was insufficiently vigorous in its defense of the environment. Based in Washington, DC, it was a national nonprofit advocacy organization with affiliates in 66 countries, “dedicated to protecting the planet from environmental degradation; preserving biological, cultural, and ethnic diversity; and empowering citizens to have an influential voice in decisions affecting the quality of the environment—and their lives.” In the U.S., FoE worked to preserve clean air and water, advocate public health protection, and examine the root causes of environmental degradation. It researched government policies and tax programs, and engaged in lobbying and legal action. FoE’s “Economics for the Earth” program focused on the economics of protecting the environment and included the “Green Scissors” campaign—an alliance of environmentalists and conservative taxpayer organizations dedicated to cutting government subsidies that resulted in environmental damage. Its legal program to ensure enforcement of, and compliance with, U.S. environmental laws was located in FoE’s Northeast office in Burlington, Vermont. Membership could be obtained for a donation of \$25 or more. Members received a quarterly newsletter, *EarthFocus*, and the biweekly *EarthFocus Online*. They were also entitled to discounts on FoE publications and merchandise.

#### *National Audubon Society (www.audubon.org)*

Based in New York, NAS boasted 550,000 members, 508 chapters, and 100 sanctuaries and nature centers from coast to coast, including eight in Connecticut and two in Maine, but none in Massachusetts. Dedicated to the preservation of birds, other wildlife, and habitat, it employed more than 300 staff members and had assets of some \$170 million. Expenses in 2000 totaled \$58 million, of which \$8.7 million was devoted to marketing and communications and \$23 million to field operations. Membership cost \$35, but new members could enroll for only \$20. Benefits included membership in the local chapter (which usually organized a variety of activities) and receipt of the widely praised bimonthly magazine *Audubon*, which had won many awards in fields such as nature photography, essays, and design. NAS’s 1995 strategic plan committed it to decentralize activities, with a goal of moving from nine regional offices to, ultimately, 50 state programs. In pursuit of this goal, the president had actively encouraged independent state Audubon societies to join or affiliate themselves with NAS. By 2001, the

only states in which NAS lacked offices or chapters were Massachusetts, New Hampshire, and Rhode Island, each of which had its own state society. NAS lobbied actively in Washington on issues that were central to its mission, including improved funding of the National Wildlife Refuge system. Chapters worked at the state and local levels. Seeking to protect migratory birds, NAS was also active in Bermuda, the U.S. Virgin Islands, many Central American countries, and parts of South America. The Society was actively engaged in a major rebranding program, including a revised logo, and was now promoting itself simply as “Audubon.”

***Sierra Club (www.sierraclub.org)***

Based in San Francisco, the Sierra Club took its name from California’s Sierra Nevada range and was founded in 1892 by the famous naturalist, writer, and conservationist John Muir. From its early days, it combined organization of group excursions in the mountains with political activity to create national parks and forest reserves. Over subsequent decades it was often successful in fighting proposals for damming of wild and scenic rivers across large areas of the western United States. It gradually evolved into a national organization, with a strong presence in Washington, using education, lobbying, and litigation to achieve its environmental goals. From the 1970s onwards, it broadened its emphasis to fight for clean air and water and extended its anti-dam crusade to other countries, including Canada and Brazil. Its mission emphasized enjoyment, exploration, and preservation of the “wild places of the earth,” promoting responsible use of resources, and education to protect and restore the quality of both the natural and human environment. By 2001, it had some 700,000 members and chapters in many states, including Massachusetts. The club organized more than 300 national and international outings in addition to the numerous outings organized by local chapters. Members received a monthly environmental newsletter, *The Planet*, and an attractive glossy bimonthly magazine, *Sierra*.

***The Trustees of Reservations (www.thetrustees.org)***

Founded in 1891, this Massachusetts organization maintained 91 reservations representing many of the state’s most scenic, ecologically rich, and historically important landscapes. Its landholdings, which also included several historic buildings, protected some 45,000 acres (180 km<sup>2</sup>) through ownership or conservation restrictions. Collectively, the reservations provided a wide range of recreational opportunities. The organization also offered function rentals at the large Crane Estate in Ipswich and bed-and-breakfast accommodation at this and one other property. Basic membership cost \$40 for individuals or \$60 for couples and families. Benefits included a free guidebook, a 50 percent discount off admission charges at TTOR reservations, discounts in its shops, and receipt of a quarterly newsletter.

***MASSPIRG (www.masspirg.org)***

The Massachusetts Public Interest Research Group was one of 26 independent, state-based research groups advocating for the public interest in their home states. In 1983, an alliance of state-based PIRGs created US PIRG ([www.uspirg.org](http://www.uspirg.org)) to share ideas and resources and, where appropriate, coordinate regional or national efforts. MASSPIRG sought to uncover threats to public health or well-being and fight to end them, using investigative research, media exposés, grassroots organizing, advocacy, and litigation. Its stated goal was to deliver persistent, results-oriented, public interest activism that protected the environment, encouraged a fair and sustainable economy, and fostered responsive, democratic government. Among the six programs it was pursuing in Massachusetts were the environment (open space, recycling, clean water, and toxics), energy (efficiency and clean, renewable power), and transportation (efficient and environmentally sound). Each program director worked with many different constituencies in support of specific goals. Located in Boston close to the Massachusetts State House, the organization had a full-time attorney on its staff. Members received MASSPIRG MASSCITIZEN, a quarterly report of activities.

***The Nature Conservancy (www.nature.org)***

Founded in 1951, TNC defined its mission as preserving “the plants, animals, and natural communities that represent the diversity of life on Earth by protecting the lands and waters they need to survive.” Its approach was to protect carefully chosen portfolios of land and water within scientifically defined ecoregions, in order to ensure the survival of each region’s biological diversity. TNC had a reputation as a very focused organization that used a nonconfrontational approach to achieve its goals. By 2002, it had successfully protected 12.6 million acres (50,000 km<sup>2</sup>) in the United States and an additional 80.2 million acres (325,000 km<sup>2</sup>) across Canada, the Asia-Pacific Region, the Caribbean, and Latin America. It had 1,400 preserves, one million members, and had launched a \$1 billion campaign—the largest private conservation campaign ever undertaken—to save 200 of the world’s “Last Great Places.” TNC’s approaches employed outright purchase and management of land under partnerships or conservation easements. A few of its properties, principally in the western U.S., offered accommodation and excursions, but none of those in Massachusetts did. TNC was based in Arlington, Virginia, and published *Nature News*, an interactive newsletter for members sent once or twice monthly by email, as well as *Nature Conservancy* magazine, which had recently been revamped and was offered free of charge to members enrolled at the \$50 or higher level. Basic membership was \$25 a year.

***The Wilderness Society (www.wilderness.org)***

Founded in 1935, TWS worked to develop a nationwide network of wild lands through public education, scientific analysis, and advocacy. Its goal was “to ensure that future generations will enjoy the clean air and water, wildlife, beauty, and opportunities for recreation, and renewal that pristine forests, rivers, deserts, and mountains provide.” Headquartered in Washington, TWS had eight regional offices across the country, including one in Boston. The activities of the northeast region focused on the Great Northern Forest—“the largest and last continuous wild forest east of the Mississippi River”—which stretched from northern New York state, across the northern Green and White Mountains, to the remote wetlands of eastern Maine. In return for a contribution of \$30 or more, members received the Society’s annual full-color publication *Wilderness Year*, a quarterly color newsletter, and member alerts.

**Study Questions**

1. How is MAS currently positioned against other environmental organizations in Massachusetts?
  2. What is a new member potentially worth to MAS? (Hint: Use customer lifetime value analysis.) Beyond the financial issue, why is membership important to MAS?
  3. What approaches should MAS use to retain members and to persuade them to upgrade their membership levels?
  4. As a participant in the Task Force on Member Communications Strategy, what actions would you recommend to the board?
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