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**Leadership Academy 2018**

**Action Learning Project Summary**

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**Mentor(s):** Lisa Severy

**Leadership Academy Class:** 2018

**Project Title:** Engaging and Retaining Millennials in NCDA: Best Practices in Content Delivery, Marketing and Communication

**1-sentence Project Summary:** Best practice research and 18 phone interviews with millennial career development professionals and graduate students results in recommendations for increased attention to targeted reduced-text content, enhanced strategy and consistent use of social media channels, and exploration of community welcome and relationship building initiatives to better engage and retain millennial members.

**Objectives of Project:**

* Support NCDA in researching and compiling best practices for engaging and retaining millennials by hearing directly from millennial members, professionals and graduate students.
* Identify content delivery, marketing, and/or communication strategies preferred by millennials.
* Identify and recommend practices for NCDA to consider implementing as strategies to better engage colleagues across generations, with specific attention to practices preferred by millennials.

**Connection to** [**NCDA Long-Term Plan**](https://www.ncda.org/aws/NCDA/asset_manager/get_file/130687?ver=6441)**:**

This project is connected to the NCDA short and long-term goal of increasing the value of the membership, specifically recruiting, engaging and retaining members. Understanding the engagement, delivery and marketing preferences of the millennial generation allows NCDA to better tailor and target outreach, programming, and community building initiatives toward this increasing global population.

*Specific stakeholders include:* NCDA Board of Directors/Trustees; NCDA Marketing & Publications contacts; NCDA Retention & Recruitment contacts; Conference Planning Team, New Members, Millennial Professionals and Career Development Graduate Students.

**Project Description:**

At 2.5 billion worldwide, millennials currently make up the largest generation globally. In the US, they hold the greatest percentage of the professional workforce, with statistics showing that they will reach 50% by 2020. Not only are millennials significantly influencing the work of our profession (who our clients are, their behaviors, and how they approach work), they also impact (and in some ways redefine) how we approach content delivery, marketing and communication to engage and retain new professionals in NCDA.

Thought leader on millennial behavior, Lindsey Pollak, says that we don’t have a choice when it comes to considering the behaviors and engagement strategies for this generation—their shear volume and buying power of over $170 billion make it critical for us to pay attention for the future of our organizations (2016). By 2020, when millennials will make up 50% of the professional workforce, NCDA seeks to be known as the “premier career development organization” and a source of innovation within the field, in addition to continuing to increase the value of membership. Therefore, we cannot afford to fall behind in understanding this generation and implementing best practices to engage and retain them within NCDA, certainly while continuing to consider the needs of all five generations currently in the professional workplace.

In this project, 20-minute phone interviews were conducted with 18 millennial career development professionals (89%) and graduate students (11%) within CACREP accredited graduate programs, capturing anecdotal/qualitative feedback in reaction to seven interview questions. Interviewees were recruited by: a call for participation through NCDA announcements, CACREP program faculty outreach, social media posts, and other LA participant outreach; notably 18 time slots were filled within a 12-hour period indicating high interest in this topic. Participant birth year ranged between 1981-1993, with 67% born in the 1980’s and 33% born in the 1990’s. Participants represent four NCDA Constituency Groups, with 72% from Higher Education, 11% from Graduate Students, 11% from Agency, and 6% from Business and Industry; 89% of participants identify as current NCDA members and 11% as either not yet members or with expired membership. Participants are located in 12 different states (representing all US geographic regions) with years in the career development field ranging from 0-20 (72% having five years and under in the field).

Additionally, best practice research focused on engaging millennials resulted in trends and key insights for NCDA to consider in evaluating and implementing new and additional practices in the engagement of millennial members, prospective members, and graduate students.

**Results:**

Summary of results from anecdotal/qualitative research interviews, highlighting most frequent responses and recommendations for consideration:

* ***General communication channels & platforms used:*** 89% reported “work email” as the number one communication channel that they pay most attention to and find most effective, with LinkedIn, Instagram and Facebook frequently mentioned as effective channels. Multiple interviewees highlighted that they did not see frequent NCDA posts on LinkedIn and that the LinkedIn page was more difficult to find as you must type out the entire organization name. Additionally, five interviewees noted that sharing the same content across multiple platforms is highly effective. Text messages were mentioned by five interviewees due to frequency of phone use, with a caveat of use for critical/important messages only and only as opt-in channel. NCDA website was mentioned, with a recommendation to connect the website more readily to social media channels.
* ***NCDA to consider about millennials & electronic communication:*** Overwhelmingly, interviewees cited attention grabbing, tailored, applicable/action-oriented, shorter “bites” of content as an important practice for capturing millennial attention. Specifically cited multiple times was a focus on emails/content that allow for quick scanning for ease of identifying relevant information. Increasing graphics, images and use of video and podcast (both informal and formal, with a recommendation for Facebook Live chats) were important practices recognized. Recommendations were made to pay attention to diversity in leadership, membership, and speakers/presenters.
* ***Most frequently used NCDA offerings:*** Monthly email newsletters, all three NCDA publications (*Career Convergence, Career Development Quarterly, Career Developments),* and the annual NCDA conference were cited as the most frequently used resources by NCDA members interviewed. LinkedIn discussions and webinars were also mentioned by a few interviewees. Four new member interviewees cited not knowing what is offered and what resources are available, and multiple interviewees mentioned believing that there were likely more resources that NCDA offers which they are unaware of. One interviewee cited not having been exposed to or asked to join NCDA since a graduate student, highlighting a possible opportunity for follow-up and new members.
* ***Effectiveness and engagement of current NCDA delivery of content and marketing:*** Overall, interviewees found delivery of content through publications, newsletters & emails, and social media to be adequate. Multiple interviewees cited that the content is highly valuable, but text-heavy—the length and graphics/images could be improved to better grab attention. Recommendations were made to consider opportunities for further tailoring content and delivery, i.e. constituency-based newsletters to increase relevance of content. The majority of interviewees found the current marketing of events, specifically the annual conference, to be effective (with multiple mentions of cost being prohibitive to travel and attendance). Regarding NCDA publications and bookstore, when specifically asked if interviewees had ever purchased something from the online or conference bookstore, 89% had not and 11% had (purchasing hardcopy books). Most commonly cited reasons for not purchasing from the bookstore were: not knowing that NCDA has a bookstore, cheaper options on Amazon and “other sites”, limited budget, and preference for seeing/hearing content or shorter content “bites”.
* ***Desired frequency and channels of communication from NCDA:*** Email and social media were most frequently mentioned as desired communication channels, with a recommendation of “strategy across multiple channels”. Preferences for frequency of communication were highly variable with no clear result. Most commonly “weekly, every other week, and monthly” were mentioned. Additionally, “semi-regular communication with tailored topics” was also highlighted. Multiple interviewees cited that millennials (and all generations) are “flooded” with email and starting to not pay as much attention to email channels, supporting the importance of communication across multiple channels to break through the “noise”.
* ***Summary of recommendations for NCDA to best engage & communicate with millennials:***
* Increase social media presence and develop strategy for consistent and frequent posts across all channels (recommended LinkedIn, Instagram, Facebook as top channels); focus on increasing “real-time” communication and community through LinkedIn discussions, *Career Convergence* discussions, and video use.
* Identify opportunities for increasing community building and connections, both in person and remotely (recognizing limited budgets for travel and professional development); higher education professionals specifically highlighted “slashed” professional development budgets as limiting to travel and association memberships (with many required by organization to rotate membership and conference attendance, possibly decreasing involvement and consistency).
* Consider ways to increase “welcome” into the association; Mentoring program (outside of Leadership Academy) connecting newer professionals with seasoned professional members; cited continued effort toward credentialing and additional certifications/professional development as attractive to millennial members.
* Increase collaboration with CACREP programs and counselor educators, including possible site visits or video conferencing, to engage new/prospective members.
* Use informal/real-time videos to increase connectivity and “approachability” of membership (i.e. video of conference venue during site visit; video by President sharing tips/new resources).
* Further incorporate millennial keynote speakers, facilitators and leaders within the organization

Secondly, best practice research and a review of literature/content experts was conducted to inform NCDA initiatives for engaging and retaining millennials. Additional research quotations and references are outlined in the attached addendum. ***Key research findings with implications for NCDA include:*** Millennials seek community, personal and professional development, and purpose/impact; they seek to be included in discussions and decision-making, as input and collaboration are important to this generation. Millennials appreciate “short bursts of content” both electronically and in person, which has implications for content and event planning. Millennials spend significant time online, and social media/digital media are effective communication channels. They are talking about products and services online with great influence, therefore brand and organizational meaning is of value and importance for this group. As they are inundated with information and “clutter” online, they seek a customized and personalized approach.

**Recommendations:**

***For implementation:***

* Take steps to streamline management of social media platforms and implement consistent usage strategy, evaluating a possible social media position to increase engagement in this area for all NCDA members and prospective members (specifically considering LinkedIn, Instagram, Facebook).
* Implement use of informal/real-time videos (i.e. video conference venue during site visit; video by NCDA President sharing tips/new resources).
* Consider channels and opportunities for “short bursts of content” reducing text, increasing images, and further tailoring content by topic or constituency group; constituency trustees consider increasing tailored communication/constituency-based tips and resources.
* Conference planning team to consider selection of keynotes and facilitators from millennial generation and diverse populations.

***For follow-up projects or activities:***

* Using this initial research (including 360 minutes of audio interviews) regarding millennial engagement, consider next steps in NCDA’s online and in-person community building initiatives (directly tied to recruitment and retention).
* Further evaluate recommendation to implement NCDA “Mentor Program”.
* Follow-up on recommendations for further use of social media platforms, video content, and social media storytelling functionalities for increased engagement and communication strategy.

***For related committee, constituency, or task force work:***

* **Board of Directors and Trustees:** Evaluate option of Organizational membership category/tiers in consideration of feedback regarding reduced professional development budgets and requirements within many organizations to vary representation across multiple associations and rotate involvement yearly, which could be directly tied to retention and member involvement.
* **New Taskforce Recommended:** Consider developing taskforce focused on “NCDA Welcome & New Member Engagement” to further evaluate a standing committee focused on more personalized welcome, resource introduction, and community connections for new NCDA members.
* **Counselor Educators and Researchers Trustee/Trustee At- Large:** Assess options to partner with counselor educators and CACREP graduate school/career specialist certification programs directors for possible in-person, video conference, and recorded opportunities to increase awareness of membership offerings, resources, and NCDA’s leadership in the career development field.
* **Publications Development Council:** Consider additional surveys and needs assessment to further explore feedback across the membership regarding awareness and utilization of Career Resource Store, in addition to increased marketing considerations per feedback from interviewees.

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