




# A Tale of Measuring Offline Community Engagement: Building Community at Team RWB

 <b>SNAPSHOT</b>
<b>SPEAKERS</b> Dan Brostek (Team RWB), Hillary Boucher (TheCR)
<b>COMPETENCIES</b> Metrics and Measurement
<b>MATURITY PHASES</b> CMM3, CMM4

## HIGHLIGHTS

1. **Interested in learning how to measure enrichment?** Dan shared their methodology at Team RWB, which has engagement at its core. Additionally, Dan shared how they developed an IRB-approved Enriched Life Scale survey instrument used in the measurement process.
2. **Looking for a definition of enrichment?** Dan shared Team RWB’s definition as it is an integral part of the measurement process.
3. **Want to know what Dan feels are his biggest lessons learned?** Dan shared 2 very important lessons, one from his Team RWB experiences and one from his career vantage point now vs. his corporate days.

## OVERVIEW

- **Background – Dan Brostek.** Dan has been the Marketing and Communications Director at Team Red, White and Blue (RWB) since July 2015.
  - Dan served as a Field Artillery Officer in the Army from 1996 through 2001.
  - Dan was with Aetna for 13 years, which is where he originally started working on communities. There he met Rachel and Jim and became involved with TheCR.
  - After Aetna he spent a couple of years as a client partner at a marketing agency called Markel. From there, he transitioned into his role at Team RWB.

## CASE STUDY – TEAM RWB

- **Team RWB.** Dan gave an overview of the background and mission of Team RWB to explain why engagement is so important to this non-profit organization.
  - **Background:** Team RWB is a 501(c)(3) organization founded in 2010. Currently, there are just over 140,000 registered members across the US. They are a chapter-based organization with 209 chapters spread out across 8 regions, one as an international region. They are stepping away from setting up international chapters because of the complexities associated with it in the veteran military space. As a result, a vast majority of members live domestically. There are thousands of people deployed overseas who are still members of Team RWB who will be state-side at some point.
  - **Mission Statement:** *“To enrich the lives of America’s veterans by connecting them to their communities through physical and social activities”.*
    - Community is at the heart of the mission statement, making it critical to generate offline engagement. Measurement of offline engagement is even more important because it’s at the heart of what they do as an organization. Physical and social activities are the connections that help Team RWB to enrich the lives of veterans.
- **Purpose.** There are almost 5 million veterans that will have served the post 911 Armed Forces by 2020. That doesn’t include the millions of additional veterans from the first Gulf War, previous conflicts and operations. These veterans face physical, psychological and social challenges when they transition back to civilian life. Interestingly, these are also challenges faced by civilians. The ability to create engagement offline at the local level between veterans and civilians is critical to the success of Team RWB.
- **Three pillars of reintegration.** Research has proven that veterans can reintegrate back into their civilian communities through the 3 pillars of healthy lifestyle, relationships and having a sense of purpose. The focus on these pillars helps to increase the enrichment of anyone’s life.

## CASE STUDY – TEAM RWB, CONT.

- **Two core programs.** Team RWB enforces these 3 pillars through 2 core programs, the Chapter and Community Program (CCP) and the Eagle Leadership Development Program (ELDP). Eagle Leaders are the volunteers who help run the chapters. Team RWB is mainly a volunteer-led organization. They have less than 30 full-time staff, but about 2000 volunteer leaders. The Eagle Leaders operate the 209 chapters across the country and drive the offline engagement through outreach, scheduling of events and monitoring group-based individual engagement.
  - **CCP:** This program is how engagement is created at the local level. The chapters deliver local, consistent and inclusive opportunities for veterans and the community to connect through physical and social activity. They host regular fitness activities, social gatherings and community service events. They also facilitate the building of strong local connections with members and organizations within the community.
  - **ELDP:** Achievement of the above is accomplished through the ELDP. The ELDP is a sequential, 36-month curriculum designed to invest in the Eagle Leaders through education, mentorship, movement and elevation in order to build empathetic, authentic, genuine, loyal and effective chapters that will enrich veteran's lives.
  
- **Unique Veteran Interactions (UVI).** This has been the basis for measuring engagement since the beginning. It's very finite. Unique veteran or civilian interactions are literally veterans and/or civilians attending a face-to-face event within their community or possibly at a regional or national level. This is the main way that engagement is measured. The online communities are what wrap around these interactions through various platforms with the purpose of driving face-to-face interactions. Face-to-face interactions are how enrichment is generated at the local level.
  
- **Event breakdown.** In 2017, there were 47,006 total events hosted. These events are broken down into 5 major categories: Races and Athletic Events (6577), Social Events (5633), Community Service Events (2688), Eagle Engagements (7169) and Exercise Events (24,939).
  - The bulk of the events are exercise events, i.e. weekly, local, consistent events like yoga classes, fitness classes, runs, etc. Eagle engagements focus more on the one-on-one type of interactions as many veterans are not ready to be in a group setting. Community service events and social events are self-explanatory. The races and athletic events are the non-hosted Team RWB races, marathons, etc. Members are recognized by their token red shirt showcasing an Eagle.

## CASE STUDY – TEAM RWB, CONT.

- **Member demographics.** A total of 76% of members fall into what they call their “veteran bucket”. This consists of veterans, those serving in active duty, Reserve and Guard. The remaining 24% represent civilians, which is unique because most veteran organizations do not allow for civilian membership. However, Team RWB believes that that is a big part of facilitating veterans back into their communities. Civilians should be a part of that because in overall society, veterans only represent less than 1% of the population. The vast majority of the people that they will interact with at the local level will be civilians. They need to be a part of the process, part of the community and part of the leadership.
  - The civilians within this group are family members, friends and outreach.
- **Measuring enrichment.** As they work towards engagement, they need to start with the measurement of enrichment because it is essentially within their mission statement; their purpose is to enrich the lives of American veterans. Measuring enrichment is easier said than done. Measuring engagement is difficult. Measuring enrichment is even more difficult.
  - The first step is to have a definition and framework that will work to help them share and measure impact with members, donors and all stakeholders. For Team RWB, enrichment is defined as “*creating quality relationships and experiences that contribute to life satisfaction and overall well-being. The concept of enrichment consists of three core components – health, people and purpose that comprise a rich life.*”
  - Through almost 5 years of research, they have shown that more engagement leads to higher enrichment. In 2017, they developed and implemented an IRB-approved Enriched Life Scale survey instrument that allows Team RWB to further quantify levels of enrichment at an individual level. Other veteran and service organizations (like first responders) also use this scale. By quantifying enrichment at an individual level, they can know which members are the most engaged. The more active and engaged a member is, the more their lives will be enriched. That leads to the engagement piece. As these instruments are created, they can begin to measure enrichment at an aggregate level to discern trends. It’s important to be able to put an enrichment score on an individual – almost like a credit score – that highlights the veterans who are low on the scale of enrichment. This way, these veterans can be offered services and programs to help improve their level of enrichment.

## CASE STUDY – TEAM RWB, CONT.

- **Measuring engagement the old way.** The old way involved a lot of piecemeal approaches. It was very difficult to manage the data. It was aggregated and anonymized, which meant that they weren't able to draw insights at the individual level. They had to aggregate everything to the national level. Using Tableau dashboards created by Dan, he rolled up all the various datasets through Google Sheets and other third party platforms to be able to create high-level views. However, high-level means that they didn't know what was happening at the individual level, which is their Holy Grail for data insights.
- **Measuring engagement the new way.** Team RWB spent 18 months building requirements and implementing sweeping changes to their infrastructure, all at the same time. It all went live at the end of 2017:
  - **CRM.** Salesforce NPSP (for staff).
  - **Community.** Salesforce Partner Community (for Eagle Leaders). This manages all the engagement data.
  - **Email Marketing Platform.** Predictive Response (for Staff and Eagle Leaders). This wraps around Salesforce. It started with all of their requirements on the backend (knowing full well that it would blow up the data on the frontend, but it needed to be done). The new frontend website is more transactional vs. marketing oriented, which is imperative to collect the type of data they needed to collect.
  - **Content Management System.** WordPress (launch of a new website with enhanced/new user functionality).
  - **Donation, Event Registration and Fundraising.** A program called "Classy."
- **New member journey flow.** Bottom line, they needed to redefine the member and Eagle Leader experience in order to truly measure offline engagement. Their mantra is "Sign up to show up." The goal is to get potential members in the door, registered and placed in an event. Usually, when someone attends a live event, they are hooked. They want to be a part of the organization, whether they are a member participant or a volunteer. That local, inclusive, consistent engagement is what Team RWB seeks because they know that that's what generates the enrichment scores. At the end of the day, they're in the people business. It's enabled by technology and data. They can't focus on the people without better technology, a better infrastructure, a better architecture, a better data model and better processes to manage the data. This consists of 4 steps:

## CASE STUDY – TEAM RWB, CONT.

- **Awareness.** Drive users to Team RWB via a variety of different sources (offline and online) and different strategies (paid, owned, earned).
  - **Account creation.** The user evaluates the organization and registers to become a member. This has become the mechanism for tracking individual level interaction data.
  - **Onboarding.** Member information syncs to Salesforce and automates a Welcome campaign series. Previously, they were never working off of the same database at the regional and national level. However, when you're managing tens of thousands of events and hundreds of thousands of interactions, it is imperative to work from the same data set. They are able to do this now. Onboarding and engaging leaders is starting to generate some of the insights needed for the different levels of the organization, which is allowing for a better outreach to those chapters and how they are managed.
  - **Engagement.** The member discovers and attends local events and activities. Since the chapters are now better managed, they can identify the struggling chapters. Previously when the data was aggregated and anonymized, they couldn't see a true picture. Now they can dive deeper into the data, identify what's happening and share best practices to help these struggling chapters improve.
- **Outcome.** Team RWB is now able to capture the coveted individual interaction and event participation data. They can draw insights from the types of events and activities that drive the best offline engagement and interactions with different segments of veterans across different geographies, which are critical to how they impact veteran's lives, manage their programs and scale the organization.
- Without the new frontend experiences, they wouldn't be able to publish events and activities, track individuals or track engagement data.
  - A huge win is the ability to create a registration process that provides an authenticated account. The member can now update account settings and Team RWB can now track addresses and veteran status' combat deployments, etc. Without an authenticated user, it was impossible to know who was interacting with the events.
  - Chapter-level representation on the site allows members to search by geography in order to find a local chapter. Now they have their own chapter webpage that doesn't need to be managed because that integration happens through Salesforce. All the data is pulled from the backend and all the events are pulled from the partner community. They are managed by the partner community users.

## CASE STUDY – TEAM RWB, CONT.

- There are 2 licensed Eagle Leader users for each chapter who manage all of the activity on the backend in that partner community, which is then integrated and published on the frontend. By virtue of doing that, people can come in as members when they're authenticated and go to events in their area. Therein lies the magic of individual level interaction data.
  - Team RWB website traffic has jumped significantly because all of the views are happening on their site now vs. being advertised in Facebook groups.
  - They've tried to make it as user-friendly as possible (including use with mobile devices) because that's what increases interactions, which increases engagement, which increases enrichment.
  - Facebook groups have changed dramatically. Facebook groups were an operational platform up until December 2017. It's still a great way to engage with members and inspire people with content about the chapter and its members, but the key difference is that event data is no longer managed via Facebook. Some Eagle Leaders were happy to leave Facebook and others are diehard fans. Team RWB has been educating them to use the Team RWB URL so that it can at least drive people to the Team RWB website. Through education, they are letting them know that creating a Facebook event will be double the work.
  - On the backend, they now have the access to insights at the national level. They have interactive reports by event type and sub-types. This highlights trends that provide learning opportunities and best practices across the chapters.
  - They also have pertinent insights at the regional level with a dashboard that drops down to chapter level views. It allows for a breakdown of all the check-ins by chapter, which provides more data points to be analyzed. Again, they can learn from each other to improve chapter performance across the board.
  - They are in a position to soon open the floodgates for defining engagement because they've limited it to this notion of a UVI. It's a face-to-face interaction only. However, engagement has many more touchpoints for these members on digital platforms, as well as the website, email, newsletters, etc.
- **Values and Eagle Ethos.** In 2012 they built an Ethos, which essentially consists of their core values as an organization. They live and breathe these values every day. These values are passion, people, positivity, commitment, camaraderie and community.



## LESSONS LEARNED

- They are just starting to scratch the service on what they're able to collect and analyze around engagement. They are literally building a new measurement framework right now to show that the UVI or check-in is just one piece of the puzzle, a much larger engagement puzzle that they're starting to build out that has more offline and online metrics. They will essentially be able to create not quite an engagement index, but a more robust way to measure the engagement of an individual member or an individual Eagle Leader. From there they will then aggregate that from a chapter level to a regional level to a national level. That will then be analyzed to see how it impacts enrichment – the ultimate end goal. Increased engagement leads to higher enrichment.
- Facebook was such a big part of how Team RWB used to interact with members in their first 7 years because it was the only platform that everyone could access. They essentially grew up on Facebook. All facets of chapter operation were conducted significantly through Facebook's capabilities. However, although Facebook can continue to be an integral part of the member experience from a community experience, it can't be the method for operational management any longer. Team RWB was always losing access to data on Facebook. Facebook will never let them have their data in the way that they needed to be able to analyze it, so Team RWB essentially pulled out that process and put it into their own environment. That was basically the integration of WordPress on the frontend to Salesforce on the backend.
- Dan's biggest lesson learned – and his steadfast recommendation – is not to ever try to change your entire infrastructure all at once, like they did at Team RWB. It was incredibly challenging, especially since they are a small organization with limited staff and a huge volunteer base.
- Hillary asked Dan to share what he has learned from the non-profit side of his career and what he would say to his corporate self if he was still in that world. Dan believes that it's very important to spend a lot of time on the digital data and member experience. Don't look at it in only its present state, but also where you want it to be in the future. Talking to his old corporate self, he would advise the creation of the most user-friendly, contextual, personalized experience possible using data to drive that experience. Don't base it on anecdotes or people's beliefs and thoughts. Data is now how Dan makes all of his decisions. However, to get to the data, you have to know your goals and objectives and have a measurement framework in place to know whether or not you've met those goals.