Overview

Adapting a common automotive tool to a common association challenge:

Chapter Dashboard Indicators offer visual signals of a chapter's health and warnings of problems. Once identified, these measures become the areas we want to assess first and monitor regularly – they become our core "watch" list.

Using the Tool:

❏　　Review the four critical variables to a chapter's success that comprise the Chapter Dashboard.

❏　　Complete the steps to determine your chapter's current Dashboard Reading.

❏　　Use the Dashboard to guide development of an action plan to improve/maintain readings

❏　　Apply the critical CAN – NEED = WANT equation.

Dashboard Indicators for Chapter Success

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What are the Chapter Dashboard Indicators? Based on industry research conducted with associations, we identified the four make-or-break elements for chapters: leadership, administrative structure, member involvement and member programs. Chapters that score high in these four areas are healthy, successful and growing. Specifically they have:

• 　Vibrant leadership with a clearly defined and operational succession plan
• 　Supportive administrative infrastructure
• 　High member involvement
• 　Menu of services that meet member needs

A strong Dashboard reading for CMAA Chapters looks like this:

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GAUGE	INDICATOR OF A GOOD POTENTIAL FOR SUCCESS
• **Leadership**	* Key board and committee positions filled with qualified volunteers in the wings. * Succession plan defined and operational. *Good leaders made good decisions and "fresh" leaders (no re-treads) keep the chapter aligned with current needs.*
• **Administrative Structure**	• Managing director fulfilling key administrative tasks; • Operational policies and procedures clearly defined; • Accurate and up-to-date member and financial records; • Ongoing tracking of key metrics (e.g., membership, registration, financial); • Complete meeting minutes and annual report to national. *An effective administrative structure establishes and implements appropriate policies and procedures; collects and tracks key organization metrics; provides the chapter identity; and assures continuity through leadership changes and time.*
• **Member Involvement**	Majority of members are active in that 1. They connect with the chapter in more than one way: attend one or more educational or networking events; tap chapter as part of preparing/seeking certification; use bulletin boards or e-mail lists; support a fundraising program; serve on a committee; and 2. The committee and board positions are filled, elections are contested and new faces are among the volunteer base. *It's not just the number of members, but that a larger percentage of those members are actively engaged in the chapter by coming to meetings and events, talking to other members formally and informally, stepping up as presenters or facilitators, participating on committees.*
• **Member Services**	• Education and networking events (at least one per quarter) • Offer regular networking opportunities for career connections *Success isn't in the length of the list, but that the chapter serves the most important needs well.*

This is based on a broad assessment of CMAA chapters conducted in 2004. You can set your Chapter's reading and then monitor it to achieve success!

Finding Your Chapter's Setting

The key to effectively using this tool lies in identifying the key metrics to measure and track your performance. Initially, these metrics help set your initial Dashboard. Then as you track the data, you use it to update the Dashboard readings. If a green light falters to yellow or red, then you know where to apply effort, energy and dollars.

Step 1: Set up tracking for metrics. You can track all using a simple spreadsheet. The basic measures are:

- **Member Counts –** Previous, current and goal for both new and renewal; you are assessing trends as well as targets. This data helps you focus on retention, a key metric in the health of the organization. Eventually, you will also want to track relevant key demographics to assess whether your chapter is attracting and keeping new segments of the profession and business as it evolves over time. Essentially, you need to determine if your chapter is consistently tracking well with both the size and composition of the profession and business in your area.

- **Program Participation –** Track participation by members and guests in all events/activities; compare averages from year to year and calculate the percentage of members who participate in at least one program per year and the average number of programs in which a member participates each year. Here you need to determine if the chapter's programs are consistently attracting sufficient numbers to justify the production effort and getting compelling participation from a high percentage of the membership (e.g. at least 80 percent of the members participate in at least one program per year).

- **Leadership –** Track the following:
  - Percentage of positions consistently filled;
  - Percentage of positions filled by "retreads" (recalled board members); and
  - How many/which positions fulfill meaningful roles.

  At the end of their term, volunteers want to look back and say, "I did something worth doing."

- **Income –** Review the balance sheet and net income at least quarterly. Ideally, set up the income statement to present each program as an independent business unit and allocate overhead accordingly (see sample). In addition to assessing the overall fiscal health of the chapter, this will help ensure that the leadership clearly recognizes the financial resources required to sustain each individual program and differentiates what Can/Need/Want looks like for the chapter (see Appendix: Setting Your Chapter's Priorities).

Step 2: Conduct Chapter Environmental Scan. This is most effectively done by a third party, however you could ask a core group of members who are not currently on the board to assist in the assessment. The key is being open to all ideas and comments.

- Interview two to three key leaders regarding their overall perception of the chapter, particularly in the four key areas from the Dashboard Tool (and to gather a sense of where the chapter can and perhaps should be headed in the new year).
- Interview five (or more) current members to identify relevant critical issues and perceptions on the chapter's ability to help them respond to those issues. These conversations will further identify how well the chapter is performing in the four key areas – from the members' perspective.

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- Review metrics listed above looking particularly at key indicators such as annual member growth and retention, registration history, history of member and volunteer leader participation and past performance in delivering programs.
- Prepare a simple market map which describes the chapter's programs relative to similar offerings from other sources in the chapter's operating area. Here you are asking the question, "who are my chapter's competitors and/or potential partners?"
- Identify any broad trends or concerns to factor into the planning process. This is a good place to ask national and other chapters for input.

Step 3: Complete the Chapter Dashboard Worksheet. Using this information in steps 1 and 2, establish your readings and determine the specific steps you'll take to maintain the green lights and/or fix the yellow and red lights.

Maintaining and Improving Your Chapter's Setting

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Step 1: Review and Update Your Reading Regularly. Ideally you will be updating your tracking spread-sheet monthly. Then, using that data, update your reading quarterly or on a regular basis that meets your needs.

Step 2: Use as a planning tool. Because we know these are the make-or-break elements for your chapter's success, you can use your readings to help you set priorities. By understanding what makes a strong light, you can set objective, measurable goals along with time-constrained action plans which detail how this will be accomplished.

All elements of the dashboard are interdependent – good leaders make good decisions about programs, good programs attract members, member participation drives income and so on. Keeping the lights green will ensure an on-going cycle of chapter success!

Leadership   Services

Cycle of Chapter Success

Involvement   Execution/ Administration

Your Chapter's Dashboard Worksheet

Rate your chapter in the four key areas using the following key. Check the appropriate box and provide the reason for the rating. Note what's working and what's not.

It's important to make an honest assessment. For example, you may have a chapter administrator who's doing a good job based on today's expectations but the organization doesn't track key metrics. Your Administrative Light would be Yellow. Or consider your member services. Do events draw a dedicated few but are largely unattended by the majority of members? This would be a Yellow light.

Green = Meeting key areas identified above *(e.g.: the Leadership light is green when you have board and committee positions filled with leaders in training; have defined and operating succession plan; and no board positions with indefinite or repeating terms.)*

Yellow = Missing some elements, but largely on track *(e.g.: the Leadership light is yellow when you have key board and committee positions filled and some volunteers at the committee level with a willingness to step up; have informal succession plan; and may have limited recycling within the board.)*

Red = Missing more than half of key elements *(e.g.: the Leadership light is red when you have openings on the board and on committees and fewer volunteers than positions in the wings or do not have a succession plan or see the same faces around the leadership table with officers that accept second, third or even fourth terms.)*

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Leadership:　　　　　❍ Green　　　❍ Yellow　　　❍ Red

Indicate reasons and relevant details: _____

_____

_____

_____

Ways to improve/maintain: _____ .

_____

_____

_____

Administrative Structure:　　　　　❍ Green　　　❍ Yellow　　　❍ Red

Indicate reasons and relevant details: _____ .

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Ways to improve/maintain: _____ .

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Member Involvement: ◯ Green   ◯ Yellow   ◯ Red

Indicate reasons and relevant details: _____

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_____

Ways to improve/maintain: _____

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_____

_____

Member Services: ◯ Green   ◯ Yellow   ◯ Red

4.34 Indicate reasons and relevant details: _____

_____

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Ways to improve/maintain: _____

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_____

Once the "reading" has been completed, list the specific steps you'll take to maintain the Green lights or fix the Yellow and Red lights. To the extent possible, set objective, measurable goals for each step along with time-constrained action plans which detail how each will be accomplished.

APPENDIX: Setting Your Chapter's Priorities

Can – Need = Want

What We Can Do:　　Looking at available resources (human and financial), determine what programs the chapter can effectively offer. If it can't be done well, don't do it!

What We Need to Do:　Identify the programs which members consider essential (i.e. "Without this program, I won't renew my membership!")

What We Want to Do:　If there are resources (human and/or financial) remaining after "What We Need to Do" has been fully covered, then, and only then, consider additional programs.

The Chapter Pyramid – Another View of Priorities

Build the chapter from the ground up and you'll naturally find the right mix of services!

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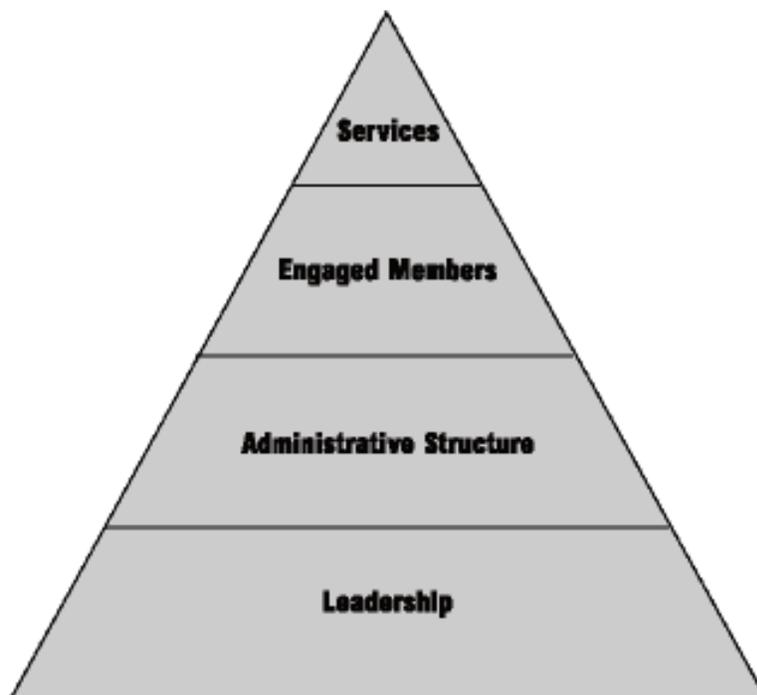
...y counts.

...at your members need and on what you

...ority to members.

...make a meaningful difference to them? ...ways members can get and be involved? En- ...always renew!

...ess your data and communication.

...lish and maintain meaningful data collection ...rting systems. Leaders can't make good de- ...without good information.

Establish the base first.

Good leaders made good decisions.