

A NATIONAL PERSPECTIVE ON MEMBER VALUE

How to Maximize Membership Value
Perception by Balancing Local Autonomy
and National Support

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INTRODUCTION



We use StarChapter to manage our website where we communicate with our members with our Calendar of Events, Upcoming Education and Announcements. StarChapter has been especially critical this year as we transitioned some board responsibilities and it is so user friendly we could pretty much teach ourselves!

*Jennifer Middleton,
2nd Vice-President
SGMP Rocket City*

National associations put a lot of time into developing their organization for the successful benefit of all members. Nationals typically set the tone and overall direction for local chapters to follow, even if local leaders are given the autonomy to manage their chapters the way they deem fit. Thus the delivery of membership value is split between national and the local chapter. The actualization of certain member benefits must rely on local volunteer leadership and board members to carry this out successfully.

National and local chapters are obviously interconnected and the choices each make will impact the other. The goal is a symbiotic relationship providing a balance that can only be achieved by working together. Ideally, chapters would consistently carry out the mission of the national association and deliver the local benefits and grow the membership, while national ensures their success by providing a structure, consistency, and support across chapters. All of this is important to track the successful outcomes of a chapter as it relates to their local goals and the goals set forth by national.



Through development of strong partnerships between chapter and national, coupled with the utilization of technology to enhance efficiency, national can empower local chapters to realize their potential, and provide value to their members without overtaxing volunteers.

When chapters go rogue or national imposes rules that are viewed as too rigid or taxing on local leader time, a great divide is created. It doesn't usually happen overnight, and in most cases, it takes years of slow deterioration and neglect before this comes to the forefront.

Finding the balance isn't always easy. The purpose of this eBook is to provide a guide to national associations on their mission to support local chapters. Through the development of strong partnerships between chapter and national, coupled with the utilization of technology to enhance efficiency, national can empower local chapters to realize their potential, and provide value to their members without overtaxing volunteers.

SECTION ONE

FINDING THE

AUTONOMY

BALANCE



StarChapter has made a huge difference in how we manage our organization. The simplicity of website updating and messaging consistency has helped us to focus on establishing our brand...”

*Judy Thompson, Executive Director
AAF Cincinnati*

In This Section

Section 1 offers an analysis of the concept of chapter autonomy. We look at the 3 most common types of chapter autonomy models.

Management of national and chapters can take on a number of characteristics depending on association size, number of chapters, industry, and purpose. Great debate exists as to whether or not local chapters should have full autonomy in regards to how their chapter is administered. Many questions need to be answered such as:

- What policies from national must be followed, what policies should just be encouraged, and what policies can be ignored?
- How similar should chapters be to one another?
- Do chapters have the same voice and branding?

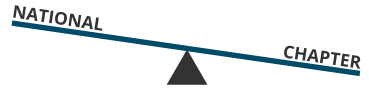
Finding this balance takes time and will vary from association to association and chapter to chapter.

The 3 Most Common Types of Chapter Autonomy Models

There is much to consider when developing your association's chapter autonomy model, from who makes decisions to how they communicate the mission of the association. Even the needs of the industry might come into play.

There is much to consider when developing your association's chapter autonomy model, from who makes decisions to how they communicate the mission of the association.

EXTREME AUTONOMOUS



The Extreme Autonomous Chapters are strong chapters that are loosely connected with a passive national headquarters. This model for a chapter may lead to stark differences in message, branding, purpose, and values. Information and local activity are generally hidden from national. Ultimately, this leaves an association with no consistency, comparability, or way to help achieve similar success across chapters.

OPTIMUM AUTONOMOUS



The Optimum Autonomous Chapters have a balance of healthy autonomous chapters that follow a strong benevolent national headquarters. In this model, clear guidelines are set forth by national for local chapters to operate within and thrive. Local chapters have their own identity, yet they're still on target for the association mission, purpose, and vision. Information and activity data are shared with national on a consistent basis without taxing leaders' time. Together national and the chapters emulate the brand of the association with maximum membership value perception.

NON-AUTONOMOUS



The Non-Autonomous Chapters are subservient chapters under one large umbrella. This type of chapter does not offer a lot of flexibility or incentive for growth and performance. Each chapter is a cookie-cutter copy from one to the next, creating possibility for monotony and no local chapter independence. All member data and information is held at national and often run off of the national website and/or portal. At the same time, no matter what chapter a member visits, it is expected to be exactly the same.

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SECTION TWO

DEFINING

CHAPTER

SUCCESS



Now when everyone is using a single platform, we can really work as a group, share content and best practices with each other and have as a group the same look and feel. This strengthens GBTA as a whole"

Patrick Algyer, Manager, Chapter & Committee Success
GBTA

In This Section

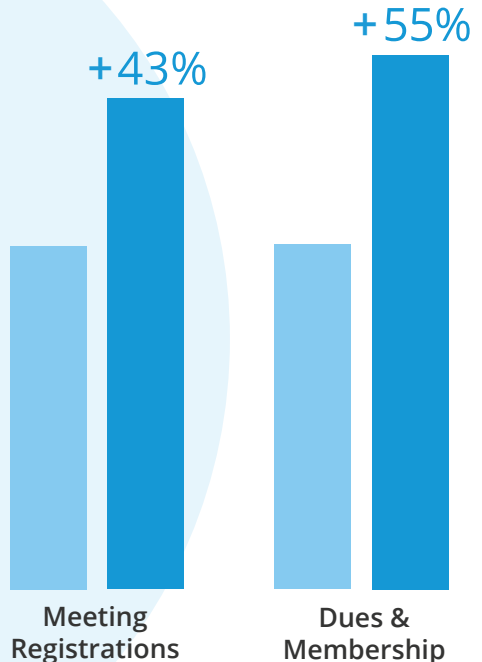
Section 2 offers a 3-stage formula for defining, achieving, and sustaining chapter success.

Once an autonomy balance is found, you can begin to pursue chapter success. The idea of success is broad and defining it for your chapters can be overwhelming. The two most effective methods we've seen successful associations use are setting up measurable Key Performance Indicators (KPIs) for each chapter to report on and monitoring engagement to determine your membership value perception.



The top performing StarChapter customers all across the United States and Canada have shown an increase in meeting registrations, dues and membership. As well as sustaining a 91% attendance rate for all of their events and meetings throughout the year.*

- Before StarChapter
- After StarChapter



*based on 2015-2016 data

Defining Chapter Success

Measuring the current status of the chapter can easily be in the form of a survey, asking pertinent questions and strategically fleshing out response options. This will allow you to obtain metrics that address your goals.

A [Chapter Evaluation Survey](#) can be used by national to monitor membership value perception. Based on the results of the survey you can build out your definition of success for your chapters. By getting a better understanding of your association's current status, you are ensuring that you are all working towards the same chapter goals.

Nationals can also utilize a [Chapter Performance Measurement Tool](#) to garner their comprehension of a chapter's achievements, activities, and needs going forward. Defining and knowing how to measure the performance associated with your goals is only the first stage to reaching chapter success; developing a plan to achieve success is the second stage.



“ StarChapter has all the tools we need in order to effectively run the administrative side of the chapter. By seeing helpful reports and statistics, we can see where our chapter is thriving and where it needs improvement. ”

*Rachel Hoffberger, President
NACE Baltimore*



Achieving Chapter Success

Upon your initial evaluation if your association is not where it needs to be in regards to your defined chapter success goals, then start planning how to get there. Knowing your starting point allows you to develop a succinct plan to get the association's membership value promise in the hands of members at the local level. The plan could include policy updates, updating services, enhancements in training/education, developing consistent promotional campaigns, or new technology. Successful chapters in hundreds of associations today are utilizing technology to enhance efficiency with online member-friendly software solutions that are specifically designed for this purpose.

Now that you have defined your idea of chapter success, developed how to measure it, and laid out a succinct plan to achieve it, sustaining chapter success is the third stage.

Successful chapters in hundreds of associations today are utilizing technology to enhance efficiency with online member-friendly software solutions that are specifically designed for this purpose.

Sustaining Chapter Success

Chapter success can be easily sustained by the introduction of technology.

The technology should be able to be adopted at the local level and provide supportive services that complement it and the roles of the daily users.

The technology will allow for data reporting on KPIs both in real time and over a span of time to help leaders evaluate performance while not overtaxing volunteer leaders. Some KPIs to consider reporting on could be membership levels, retention, event attendance, email volume, website visits, and revenues generated through dues, events, sale of products, and sponsorships. Measuring the KPIs chapter-to-chapter will guide efforts

throughout the year to support and sustain desired success.

Having a service that supports the local leaders and the continued use of the technology is critical. The service should understand the roles of each user and what the desired outcome should be for the local chapter and can offer instruction, guidance and best practices during key role transitions.

As you achieve each new milestone it is imperative to periodically redefine success to maintain sustainability. Communication is central to this process. Providing accurate feedback to each chapter is necessary for continued success.



One of the primary ways the SMPS Indiana chapter uses StarChapter is for event management. The ability to easily communicate with members and track registrations and payments is critical. The event history is useful for planning future events."

*Cindy Culbertson, President
SMPS Indiana*

Nationals should provide praise, awards, or perhaps develop a rating system to recognize progress. Measuring along the way with accurate real time reporting will allow chapter activities to flourish and chapters will be able to achieve sustainable levels of success.

Local chapters that are able to manage events, communication, membership, and revenue have strong volunteers who make it happen. Typically that success will last for a while, but will not be truly sustainable as the cycle of leadership turns. They come on the board, move from position to position, and go off the board. There needs to be a plan in place to provide assistance with the transitions as they happen each year. Over time, the continuity of chapter achievement is being put to the test.

The widespread issue seems to stem from the lack of training. Alleviating the concern for lack of training, both in how to do the job on the board and how to use the technology that makes doing the job more efficient is of central importance. The provided training schedule for both the position and the technology must be consistent and practical as it needs to speak to various roles and leadership responsibilities within each chapter.

Board Training

Offered by StarChapter on a bi-weekly basis

Content & Communications

- Admin access to StarChapter
- Managing site content and navigation links
- Setting up the newsletter
- Completing mass mailings within the system

Meetings & Membership

- Setting up meetings
- Working with meeting templates
- Managing your members' information

Treasurer

- Working with meeting registrations
- Sending invoices
- Adjusting balances
- Financial record-keeping in the system

SECTION THREE

MEMBERSHIP

VALUE

PERCEPTION

FOR CHAPTER

SUCCESS



“We could not have achieved our goals without the assistance of StarChapter! They significantly improved our process to manage the twice-a-year events and assisted in streamlining communications, automating member list management, and reducing the time Board members spent on managing the chapter.”

*Board
Security Traders Association of St. Louis (STASL)*

In This Section

Section 3 develops comparatives regarding three significant association aspects: news and action, communication, and clarity of message. Specifically, how each impacts the membership's value perception at the national versus the chapter levels.

Membership value perception will be realized at both the national level and chapter level.



Understanding where the divide lays as well as what members classify as value is important. Value is essential in terms of what national and local chapters offer to their members. Value is what makes members join, stay, and become leaders.

News and Action





The value of news and action cannot be stressed enough. Sharing information with membership is essential to chapter success. The type of news and action in relation to the work the association does could be driving legislation change or tracking of certification processes for members. For instance, with regard to driving legislation at the federal or state level, as national you want to keep all parties informed about what is going on with laws that may impact the association, local chapters, and membership. Local chapters then have

a responsibility to share the news and inspire members to take action.

Training and CE (continuing education) represent another area related to news and action. Depending on the trade or profession of your association, there may be certification benefits that assist members in enhancing their credentials and thus achieve career advancement possibilities. This certification process often plays out locally but may be recorded nationally.

Communication

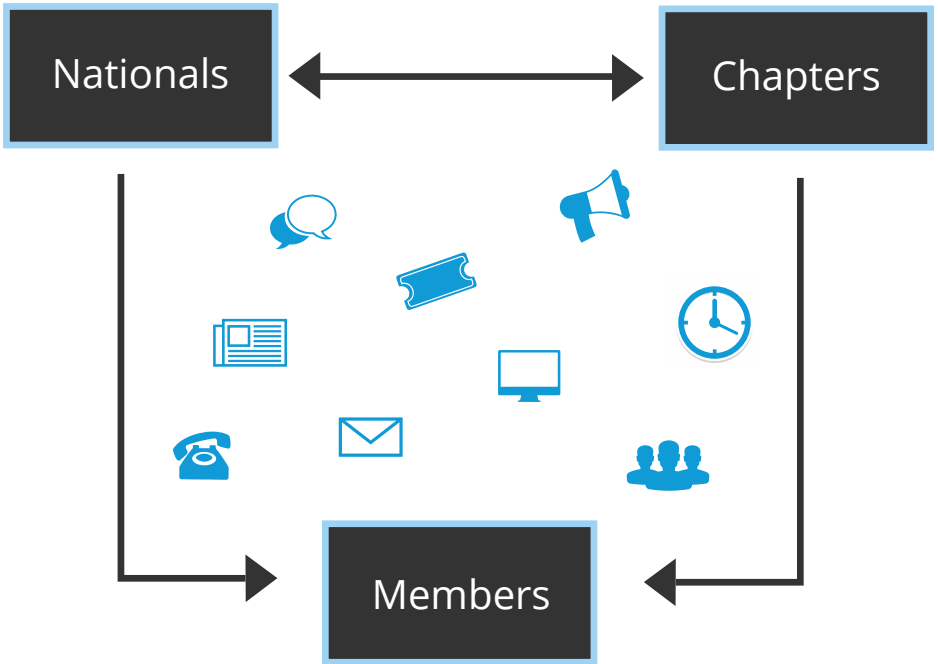
Communication is likely the most important aspect regarding the value of membership in any association. Regardless of chapter or national involvement, information needs to flow between the two and out to members. Logistically, exploring the effectiveness of different communication channels is essential to know how each should be used.



Communication is likely the most important aspect regarding the value of membership in any association.

There are many choices to consider regarding logistics:

Nationals can consider communication channels through their own means as well as through their local chapters. It is important to evaluate whether your members would engage in a specific piece of content more if it was available via your local chapters.



Who sends these is another consideration: local leaders or various staff members at national? The actual content and purpose of the message is of utmost importance as you consider what channel to share your communication through.

Clarity of Message

Providing a consistent message both from national to chapters and vice versa enhances value for the association over all. Whether you are focused on the context of news and action or seek clarity for the brand, mapping the value perception for membership encourages growth and sustainable success. **Chapter success involves a strong partnership between national and chapter.**

SECTION FOUR

NATIONAL

SUPPORT FOR

CHAPTERS



Without StarChapter's support in providing the framework and technical capabilities for our chapter to set up events on our website for members to peruse and register for, to prepare and send out regular newsletters to our members to keep everyone informed, or even to facilitate sending out mass emails so that we can keep members in the loop, our chapter could not function.

*Joung Eun Lee, Board Chair
AILA DC*

Local chapters need support from the national association whose brand they are meant to represent. They are part of the brand and represent it locally, after all. Even with autonomy, they need to be provided with guidance. This way all members can realize the greatest value for their local participation in a national association.

In This Section

Section 4 first addresses the technology needs at local level for volunteer leadership, then offers three technology models with relation to how the national can support local chapters.

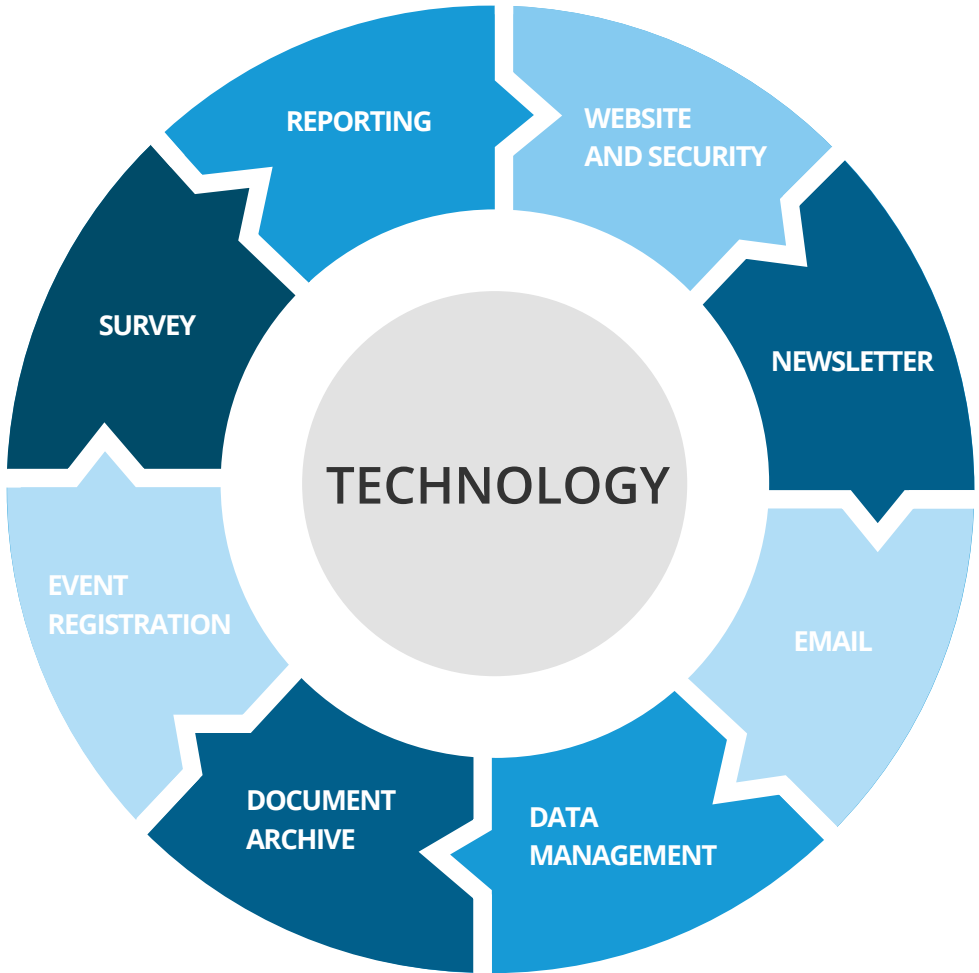
Technology Service at the Local Level

Chapters do a lot of good work creating value for their members. To do so, volunteers must manage key aspects and report information back to the national association for monitoring. This process ultimately makes it easier for national to know what kind of assistance to offer chapters along the path to success.



Engagement can be challenging in today's busy world. Making it easier for members and guests to access information is critical to engaging and growing our membership. StarChapter has helped us accomplish this task with an upgrade to device friendly webpages, easy registration and registration accounting, and even a newsletter template. In addition to the front-end improvements and tools, the StarChapter back-end database is an impressive and powerful tool."

*Board
IFMA Chicago*



The 3 Support Models From National to Local Chapters for Technology Service

Three models exist offering the national association options about providing support to each local chapter. Each model has pros and cons that need to be evaluated by considering your association's goals.

1. Self-Sourcing Model
2. Total Control Model
3. Strategic Partner Model

1

Self-Sourcing Model

In this model, national tells chapters to source everything themselves and support themselves.

There are a lot of technology options in the market and one position for national to take is to allow local chapters to source everything they need themselves. They can go spend what they want and figure out on their own if one or many solutions will work. It is likely that data will be lost, time will be spent in futile directions, national will be uninformed about chapters' status, and the chapters will ultimately lose valuable time and money. Under the Self-Sourcing Model, current and potential members could be discouraged from joining the board, which can have an irreversible effect on the longevity of the chapter.

2

Total Control Model

In this model, national will provide the only solution authorized to be used and manage the process.

This will certainly keep things consistent for branding and information control, but might be limited in functionality. It will point all support, back to national, which could lead to increased employment costs. Email delivery could also be hindered if chapters have to wait for national to handle sending. In other words, the benefits of the Total Control Model might be overshadowed by the drawbacks of inefficient technology and possible bottleneaking.



3

Strategic Partner Model

This model is about striking the balance between local chapter autonomy and national control utilizing an association technology partner.

It is likely the strongest form of support to inspire the best chance at success for local chapters and at the national level. The Strategic Partner model is beneficial to success in four key ways:

1. Tech Support

A balance can be struck using the right technology partner. Local leaders can have control over their activities and updates without having to be a technical guru. The technology partner becomes the support mechanism for the chapters using the software, which relieves national of this burden and saves them time, money, and energy. It also provides national with a solid reporting mechanism to share local chapter data and activity without taxing the local volunteer leaders. It provides real-time and accurate data.

2. Chapter Support

Chapter support is going beyond general technical support for the software offering an understanding of how it is being used in the world of local association chapters. Local leaders change and often take the knowledge and experience with them, whereas new board members need to be shown the ropes. A good support staff within the technology partner will know how to guide new leaders and keep their chapters on the path for success.

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3. Efficiency Support

When national and chapters share the same vision and utilize the same software vendor that understands the needs of the association and can assist with implementation, then local volunteers do not carry an unnecessary burden. They can enjoy the work and find value in their leadership while providing value to members as a whole. This is what makes associations successful.

4 Long Term Support

When a partnership is created between national and chapter it is sustainable for the long term. When an association engages in a relationship with a vendor for the benefit of supporting chapters, it allows for sustainability of success and continued growth.

Without support, chapters are left struggling to achieve and sustain success. Providing a trustworthy Association Technology Partner (ATP) gives chapters a viable and cost-effective solution to achieve that success. Through goal alignment, continuous support, and a long term relationship, developing strategic partnerships are good for the association.



The StarChapter system meets our varied needs ranging from communicating with members, analyzing the membership data, planning and managing events, and robust financial reporting. StarChapter provides many sophisticated tools in an all-inclusive package that helps us promote the growth, and ultimate success of our chapter."

*Board
PMI Oklahoma City*

SECTION FIVE

SOLVING THE

DATA DILEMMA



Our members are volunteers and their time is precious to them even if it's not compensated monetarily. As a result of the time savings of the new auto-import features of StarChapter [StarChapter Data Membership Sync], our members likely have more time..."

*Brian Unrein, IT Manager
ASHRAE*



The desire for extreme autonomy among some chapters remains a struggle for national. The chapter may contest aspects of a potential partnership with national, from honoring brand messaging to following recommendations that could save the chapter in costs. Having the privilege of being part of the association and representing that national identity is meant to assist a chapter in its growth. In that light, even the most autonomous chapters should be required to meet certain criteria.

In This Section

Section 5 provides solutions to ensure local chapters meet a certain level of “minimum” criteria and fulfill obligations with regard to four areas

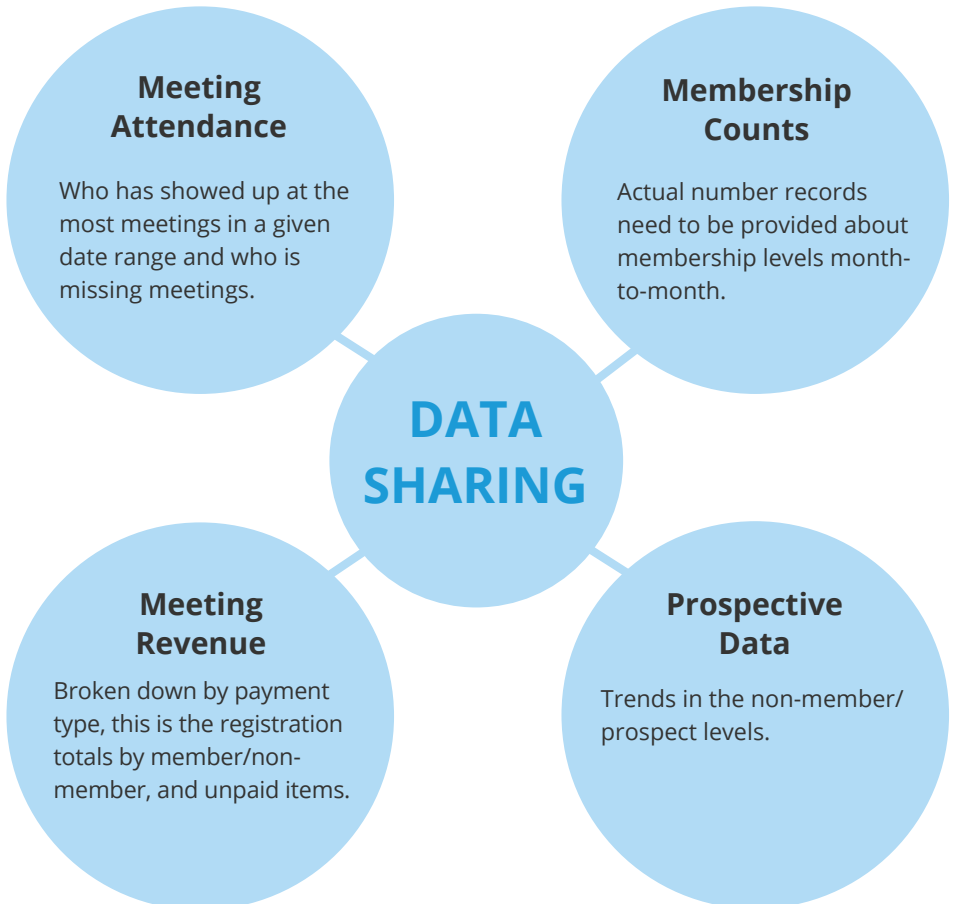
related to chapter reporting of data to national. This includes regular data sharing, time commitment, workforce, and accuracy.

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Regular Data Sharing

Various kinds of data have to be shared with national to help shed light on whether goals are being met and a chapter is achieving success. Sometimes, chapters just don't want to comply with regular data sharing. Before taking the worst case scenario of removing a chapter's charter, national can utilize both the [Chapter Evaluation Survey](#) and

[Chapter Performance Measurement Tool](#) mentioned previously to assist in meeting reporting requirements while maintaining autonomy. In this way, it can also be made clear exactly what has to be reported. At minimum, chapters should be sharing membership counts, prospective member data, meeting revenue, and meeting attendance.



Time Commitment

When trying to identify how much time chapters are spending gathering the regularly needed bare minimum of information, things can get complicated. Now say they use one system for events and another for sending out emails, time commitment can vary greatly. Obviously the more manual the process is, the more time it takes to complete it, and the more frustrated the leaders become. If the systems do not communicate with one another, the frustration grows exponentially. Consistency also becomes

a problem, month-to-month, volunteer-to-volunteer, and chapter-to-chapter over time. The more manual labor involved, the less likely it is to keep the same people active in leadership roles, which means new people learning to do a job and applying their changing perceptions. Ultimately, information is gathered but not always in the same way or format, making it difficult to have comparatives over time to draw conclusions for the future.



Downloading an accurate chapter roster has been a major pain point for our chapter leaders and StarChapter took heed and worked diligently with our IT Department to build a gateway for our system [StarChapter Membership Data Sync] to send a daily upload to each chapter. This has been a wonderful added benefit and selling point for our chapters to sign up with Star Chapter. This relationship is a win-win all around."

*Nikki Jackson MA, Director of Member and Chapter Services
Case Management Society of America (CMSA)*

Workforce

With manual compilation, it is likely more than one person is needed to put the information together and send to national. Sometimes the entire board needs to review reports before they are sent to national. This causes delays and can also lead to inconsistencies. Possible ways to overcome this involve employing technology that streamlines the data reporting and creating a single position whose sole duty is data compliance.

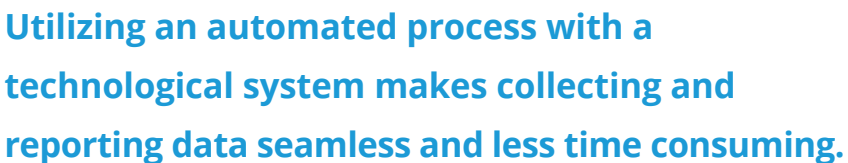
Accuracy

With so many hands in the mix, manually entering data risks inaccuracies. If a lot of time is needed to produce reports and multiple people are involved in the process, then mistakes are more likely to occur.

Fixing these problems can be easy and will allow chapters to maintain autonomy. By removing the burden of manual data creation, and utilizing an automated process with a technological system makes collecting and reporting data seamless and less time consuming. The data is still collected by volunteers at the local level where the chapter activity is taking place. The difference being the

data can be collected automatically, daily or nightly, in the process of doing the work and can then easily be reported in a format that is comparable to other chapters.

If the local chapters all have a system that is the same for event registration, newsletters, surveys, membership and non-member management, and the training and support to use it, all of the reporting can be standardized and automated. Autonomy is maintained while data is collected and stored consistently like other chapters for the ease of reporting to national.



Utilizing an automated process with a technological system makes collecting and reporting data seamless and less time consuming.

CONCLUSION

A National Perspective on Member Value: How to Maximize Membership Value Perception by Balancing Local Autonomy and National Support

Success for your association starts with establishing a goal for a healthy balance of local autonomy and national control. Chapters need tools to function and grow. They need support from national, but also need the freedom to grow membership and be a solid conduit for channeling association value with a local flair. When both are doing what they do best, an association can flourish.

If national provides the right tools, structure, and support chapters can grow in membership and increase the dues and non-dues revenue for the association as a whole.

These tools should include the technology used to run chapters daily activities such as website, newsletter, email, events, surveys, membership list management, and aggregated reporting across

chapters. Working with the right strategic Association Technology Partner (ATP) will provide the highest level of efficiency and consistency and long term support needed to attain real growth and stability. The right partner will offer not only the right tools but also the industry insight about how to best run the chapter, provide guidance and training, and how to get the most out of volunteer roles in minimal time.

Look at establishing a relationship with a strategic Association Technology Partner (ATP) that is well suited to provide chapters with needed services and support. The ATP will also need data and communication sharing with national which will enable national to identify best practices to share with the association as a whole and create a sustainable track record of success.



StarChapter helps make the challenging tasks of communicating, surveying, tracking and interacting with members and potential members easy. They are truly a one stop shop..."

*Jordan Temple, Current President
IABC Houston*

StarChapter is a member-friendly association management software company serving local chapters of professional and trade associations in the United States and Canada. StarChapter's mission is to help local leaders grow their chapter's attendance, membership, and revenue. The software combines event registration, membership management, email communication, responsive website layouts, web services, and eCommerce tools. New and transitioning board members have access to dedicated StarChapter specialists, 24/7 online or live support, phone support, and ongoing board training webinars. We continuously enhance and develop more features and services to fit your chapters needs.

www.starchapter.com

