Do You Track Chapter Metrics? Or Are You Going By Gut Feel?

As we sprint toward the end of the year, it's a great time for your board to reflect on all your chapter has accomplished this year, as well as what you didn't accomplish. Having all this information lets you see how well you did and adjust as you need for next year.



How much did you grow your chapter membership? Did you bring more people to Lunch and Learns, get more sponsors to renew or bring in more members as volunteers? If you're judging your success by "feel" and not real data, do you really have a good sense of how well you did in each of those areas?

We've been thinking about the importance of chapter goals and how having them can help you better plan your chapter's future.

Why should chapters define goals?

Goals let you develop clear definitions of success. Without them, your achievements can be difficult to measure, especially when there's a good chance each board member has a different definition of what a "having good year" means.

One board member might define "good" as one new person attending each chapter Lunch and Learn, while another expects at least five. A third person may think the chapter met their definition of a good

year, because your spring conference was a success, but they don't have a black and white definition of what they mean by a "good year."

Goals provide your board members with unified targets against which you can measure success. When you define and highlight them, they can provide clearer connections to chapter value with members and sponsors. And, even when you fall short of a goal, the metrics you gather give you concrete information to make changes based on.

How to define chapter goals

Board conversations around chapter goals don't need to be long or involved, and sharing questions like the following before you meet can make the process go more smoothly. The opportunity to plan gives all board members, including those who may not think quickly in the moment, and your more introverted board members, the chance to prepare what they want to share and develop additional questions they want the board to consider.

1. **What worked best this year?** Identify the programs, practices, etc. you want to understand in more detail.
2. **What are you considering changing next year?** Are there things that didn't work well and you want to see the numbers to understand gaps more clearly?
3. **Which metrics matter most?** What are the numbers that will best reflect your chapter and your needs?
4. **How will we measure success?** Who will track each number, how often you'll review them and where you'll share the results.

Sample chapter goals

Many chapters set goals in the following areas:

- **Membership growth.** How many new members do you want to engage this year? Of the members due to renew, how many members do you expect to lose? (If your renewal numbers are below where you'd hoped, you may want to explore an automatic member renewal program.)
- **Event attendance.** How many new members do you want at each of your monthly meetings? Guests? How many repeat attendees?
- **Sponsorship revenue.** How many new sponsors do you want to bring in this year, and at which sponsorship levels?

- **Volunteer engagement.** How many new volunteers do you want to bring on to the board, committees, etc.?

Setting SMART goals

Once you define your goals, you'll want to be sure they're ones you can easily capture. Review your goals and make sure they're set up in a SMART way. SMART goals are:

- **(S)pecific.** Define exactly what you want success to look like. What do your board members agree you should track for each goal?
- **(M)easurable.** If you can't count it, you can't track it. Decide if you want to track by general numbers, dollars, percent or something different.
- **(A)lign.** Choose chapter goals that support your broader strategic priorities.
- **(R)ealistic.** Three or four well-chosen goals are good, versus a dozen that will take a significant amount of your volunteers' time to track and manage.
- **(T)ime.** Set a clear deadline for achieving each goal and reviewing your progress.

For example, "grow membership" is generic, but "Increase membership by 10 percent and raise our renewal rate from 78 to 85 percent" are SMART goals.

To measure your SMART goals effectively, you'll need accurate chapter data. If your membership list is old, event registrations are in three different spreadsheets and no one is sure who owns your sponsorship tracker, fixing these are the first steps to tracking your progress against your chapter goals.

Celebrate chapter wins and learn from chapter losses

Once you have your numbers, recognize what went well. You may find that things went well even if you missed the goal you set. Let's say you want to increase event attendance by 15 percent, but you only increased it by 10 percent. At the same time, 10 existing members attended each of your Lunch and Learns. Each Lunch and Learns also brought in at least one first-time attendee and two of those new attendees joined the chapter.

First, this information tells you what members want. They want to learn, so make a note to continue this next year. Take this opportunity to recognize the volunteers responsible for this series of events. Next, explore the 10 percent versus 15 percent numbers. Was 15 percent unrealistic and 10 percent

attendance an improvement? Or was something off with your process? Did a key volunteer step away? Was the timing off on your membership campaign, or did your member retention strategy not work as you expected? A drop in attendance could also point to something that's missing from your member communication plan.

Good and bad, everything you learn from tracking your goals is a chance to make the necessary changes to see improvement.

Don't wait until January

It's tempting to put off reviewing your chapter goals until January, when you believe things will slow down. But do things really slow down in January? By the time you hold January's chapter board meeting, your fiscal year has started, your first events are on the calendar and conversations your goals will impact are already happening.

If you didn't set concrete goals last year, it's never too late. Taking these steps and cementing what you want to track next year will give your chapter a head start on a successful next year.