

# It's Time For Your Chapter Health Check



How healthy is your association chapter?

Wait...what kind of question is that ?

Businesses do it, at least the successful ones, so why shouldn't association chapters?



Companies of all sizes review their operations and use the information they gather to develop a detailed picture of things that are going well while also highlighting potential business problems. This regular review provides critical insight that allows them to act based on real information, before small problems become insurmountable ones. It also helps keep their company on track to meet their objectives.

You can apply these same principles to understanding the overall health of your association chapter. Here are some ideas for your first association chapter health check.

## **What is an association chapter health check?**

An association chapter health check is an in-depth review of the different areas of your chapter. Answering questions tailored to your specific association chapter, you'll develop a detailed picture that lets you see how you're operating, compared with how you think things are going.

An association chapter health check can include a combination of:

- Yes/no questions
- Open ended questions
- Scaled responses (i.e., 1 to 5).

### **What does an association chapter health check cover?**

Most association chapter health checks look at:

- Strategy and Planning
- Sales & marketing
- Membership
- Financial management
- Overall chapter satisfaction

### **Strategy & Planning**

Do your association chapter plans cover day-to-day operations, or do you have more of a long-term vision for your chapter's success? (Hint, a chapter is typically more successful when they have both – short-term plans for each chapter year and longer-term plans for the chapter for the next 3-5 years, or even longer.) Here are a few questions to help you better understand your association chapter plans: what they are, their time frame and how well your chapter is meeting them.

- Do you have a clear vision of where your chapter will be in 3-5 years?
- Do you have plans in place to realize that vision?
- How well do your chapter plans align with that vision?
- How do your plans for your next chapter year fit in with your long-term vision for your chapter?

### **Sales & Marketing**

Bringing in new members, new sponsors, offering swag to members, etc., is sales and marketing, and something that chapters don't focus enough attention on. Checking your association chapter's health here is critical, as sales and marketing can be foreign, uncomfortable concepts for many chapters and boards. To see how well you're doing in this area, ask:

- What's your chapter's unique selling proposition (USP), e.g., what makes you stand out from other chapters?
- Do your board, your committees, members understand your USP and can they explain it? Do your chapter materials document and explain it?
- How effective is your marketing? Does it make your association chapter stand out?



## Membership

You're "in business" to serve your members, bring on new ones and get the ones you have to stay. To keep your chapter around for the long-term, you need to know how good a job you're doing with your different membership groups, from your members in different generations to those new in their careers and those who are closer to retirement. It's crucial to understand how well your chapter services align well with what your members and member guests want. Here are some questions to ask, to understand your membership base – who they are, who you want and how you keep them:

- Who are your ideal association chapter members?
- Who are your current members? How closely do they match your ideal members?
- Who would you like to add to your membership base?
- Which type of members stick around the longest? Do you know why they stay?
- Which members leave more quickly? Do you know the reasons why?

## Financial Management

Many chapters don't keep a good eye on their financial situation , and some have found themselves with just \$2000 in their association chapter bank account; that's a big problem. Understanding your chapter finances is critical to your ability to keep your chapter moving forward as you want it to and continue to provide the services members come (and stay) for. Ask your treasurer and anyone else involved in your chapter finances:

- How has your revenue functioned over the past three years?
- Does your association chapter have a clearly defined budget?
- How well do you stick to that budget?
- Do you have any regular chapter cash flow problems?
- Is your bookkeeping up to date?
- Do you pay your bills on time?

## Chapter Satisfaction

This is different from association chapter membership . In this area, you explore how happy your members are with your organization, reviewing things like leadership , member engagement and culture. This section can illuminate any association chapter board dysfunction, satisfaction of your members with your services and if your culture is helping or hindering your chapter. Here are some questions to get you thinking about your chapter "climate":

- Does your board have the structure, resources and training to deliver on your chapter mission?
- How comfortable do members – on your board, committees, or in your general membership – feel sharing ideas and recommendations?



- How happy are your members?
- What makes your members happy?

**What makes a healthy association chapter?**

It's not enough to gather this information and think you're done. That's the start. Next, you'll analyze that information and use what you learn to either pat yourself on the back for continuing to do a great job or sigh and make changes based on specific feedback. Or some sort of combination. This exercise in "self-reflection" will help you improve every year.

