

Keep Moving Forward – Ask The Right Questions In Your Annual Chapter Vendor Evaluation



Many association chapters take a “set it and forget it” mentality when it comes to the system or systems they use to manage their chapter – whether they use a single Association Management System (AMS) for everything or different systems for email, event registration, blogging, etc. Does that sound like your chapter – does your board operate on the feeling that as long as things seem to be working ok, there’s no reason to change any of them?



There’s no way to find out how things are really going unless you ask the association chapter volunteers who use these systems. Only then might you learn that one system is a little quirky and has an interface that requires regular users to answer the same questions each time they access the system. Or maybe you’d learn you have a much bigger problem, like a system that limits you to a number of contacts, which means you can’t connect with as many association chapter members, guests and sponsors as you’d like; as a result you’d have to narrow each of your email campaigns, which isn’t helpful for membership or retention.

To really understand what you’re working with, completing regular association chapter vendor evaluations should be high on your chapter’s To Do list. During a vendor evaluation, you review each of your systems – paid and free – and the vendors providing them to ensure they are really meeting your needs in the moment and will continue to meet the needs of your chapter as it grows and evolves.

We recommend doing association chapter vendor evaluations annually, at approximately the same time each year.

What should you look for?

To gather the most relevant, useful information we recommend customizing an evaluation to an individual association chapter. Here are our thoughts on helpful, relevant questions to explore and information you may want to collect for each of your systems. Consider creating a form to use for each evaluation, which will allow you to collect the same information each year and track your responses from year to year. Some of the questions on an association vendor evaluation may require short answer responses, while others would work well with scaled responses, e.g., “on a scale of 1 to 5...”

General questions

- Why are you using this system? What are the tasks you’re using it for?
- Are those tasks easy to complete? Are they quick, or do they take a significant amount of time?
- How long does it take a chapter volunteer to accomplish Task A (or B or C or D)?
- Is there something you want or need to do that the system can’t do?
- Are there other systems available that could do what you need more easily? If so, what is keeping you with this system?
- Does this system help you meet your chapter mission, or is there something about it that’s making that work more difficult?
- How difficult is it to train someone new to use the system?
- How well does the system allow you to meet your chapter and/or National organization’s branding guidelines?
- How much are you paying for the system? Do you believe its capabilities are worth what you’re paying? (Free doesn’t necessarily equate to high value.)

Specific questions

- How many members does the system let you capture and use? Will that be enough for your needs in the next year?
- Does the system place a cap on the number of association chapter events you can use it for each year, for things like registration or event management?
- How flexible are the email templates it provides? Does it provide enough template options?
- Can you easily segment your association chapter email campaigns so they go only to the people you need them to, like members who have never attended an association chapter event or guests who’ve attended but haven’t joined?



Before you start collecting this information, make a list of all of them and document your reasons for using each. You may find that you have some systems you weren't even aware of. This would also be a great time to ensure you have all the log on and password information for the different systems.

What might need to change soon?

As you're completing your evaluation, consider what a system can do for you in the moment, as well as what you'll need it to do over the next year and maybe even the next three to five years. Will it continue to meet your needs, or as your association chapter grows and changes will limitations start to appear, like a cap on the members you can contact or another small annoyance that could become a major problem?

When Kayla Duddy, chair of the Oregon Association of Municipal Recorders (OAMR) internet committee, helped her chapter complete an evaluation at the same time they were experiencing chapter growth and some pains as a result of that growth, the chapter learned users found the AMS they were using "clunky and hard to use" and limiting their ability to grow. They also learned it was time to modernize the look of the website, create a smoother process for members, and have a system that's easier for volunteers to use. And that's when they decided to move to the StarChapter AMS.

Unless you take the time to really understand what you're using, you'll never know if your system really is working as you need it to, if it's a little frustrating or giving users a major headache. Annual association chapter vendor evaluations can help point out those limitations. Evaluations may also show you people think your chapter website hasn't been updated since the early 2000s, and because you can't update it without a lot of work, visitors who are considering joining may quickly look elsewhere.

