

6 WAYS TO LEVERAGE

Leverage on your collaboration with StarChapter in different levels. Start off our partnership at any engagement level. We can tailor the program to your association needs and progress our partnership at the pace you desire over time.

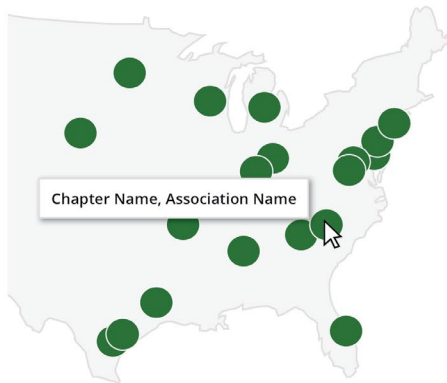
APPROVED VENDOR	National sees StarChapter as a viable resource for local chapters.
ENDORSED VENDOR	National actively promotes StarChapter without mandating a change to local chapters.
PREFERRED VENDOR	National promotes the use of StarChapter in local chapters.
EXCLUSIVE VENDOR	National chooses StarChapter to be employed by ALL local chapters.
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Gain access to real-time, aggregated data to help you get better insights to local chapters.
- 4 SIGN UP INCENTIVES**
Let chapters know national is advocating for them and let us promote a discounted offer to local chapters.
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StarChapter will work with your IT team to develop a two-way data integration.
- 6 SPEAKING ENGAGEMENTS**
Invite us to leadership summits/conferences or other speaking engagements to promote collaboration.

StarChapter Portfolio

Product developed especially for national leadership to gain access to real-time, aggregated results, helping you and your management team gain better insights to the local chapters.

Chapter Overview







Snapshot

MEMBERSHIP
3,026
 NON-MEMBERS: 41,136

Alerts

AGGREGATE ALERTS

-  Decrease in Meeting Attendance: -33.29%
-  Decrease in Sales: -12.17%
-  Decrease in Activity: -7.48%

<p>SALES</p> <p>View Full Report </p>	<p>TOTAL</p> <p>\$256,323</p>	<p>EVENTS</p> <p>\$243,835</p>	<p>DUES</p> <p>\$0</p>	<p>CATALOG</p> <p>\$12,488</p>
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As a result of the time savings of the new auto-import features of StarChapter, our members likely have more time to plant a tree and rescue a puppy. StarChapter has made the world a better place thanks to their comprehensive tools and their ability to automate.

– Brian Unrein, IT Manager
 American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE)

CHAPTER DEVELOPMENT

A NATIONAL ASSOCIATION PERSPECTIVE

Striking the balance between local chapter autonomy and national control utilizing an association technology partner.



CHAPTER DEVELOPMENT

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INTRODUCTION

National associations put a lot of time into developing their organization for the successful benefit of all members. This plays out primarily at the chapter level with volunteer leadership and board members. The role of national, however, is essential for local chapter's success. National sets the tone, even if local leaders are given the freedom and autonomy to manage their chapters the way they deem fit.

Chapters and national are interconnected – the choices each make will impact the other.

And all of this plays a role in measuring and tracking the successful outcomes of a chapter as it relates to their local goals and the goals set forth by national. The national plays a huge role in ensuring this success by providing a structure for local chapters, creating consistency across chapters, and offering pre-vetted options for vendor services. But all of this value can be lost if chapters are expected to follow rigid rules and obtain permission for every single management choice their volunteer leaders make.

Finding the balance isn't always easy. That is where this eBook comes in. 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, local chapters can realize their potential, and provide value to their members without overtaxing volunteers.



StarChapter is a fantastic Website for any size organization. When you are a new customer you have a bunch of templates to pick from and Customer Support gives you a personal attention. Setting up meetings and sending out mass emails of any type is a snap.

— John Walik
ASHRAE - Houston

INTRODUCTION (CONTINUED)

Adopting a customer service philosophy of partnership based in mutual goal attainment is at the root of any success. No matter the size of your association's membership or the number of local chapters you work with, it comes down to how that support is communicated to chapters.

Through five chapters this eBook offers national associations a guide to developing a balanced partnerships with local chapters for the success of both the chapter and the association as a whole. Chapter 1 defines success both generally and with specific focus to your national association's connection to its local chapters.

Chapter 2 examines the idea of value within finding success. Chapter 3 offers insight into how allowing chapter autonomy is the best path to success. Chapter 4 balances the needs of the chapter with how national can provide support. Chapter 5 addresses the problems faced with reporting of data to national.





CHAPTER 1

DEFINING CHAPTER SUCCESS

“When asked to define success, most people cite conventional ideas of success, such as achieving independence, attaining a position of power, or amassing wealth.”

Jayson Demers, Founder and CEO
AudienceBloom

THE IDEA OF SUCCESS IS BROAD, containing both a subjective and objective levels of interpretation. No matter the trade or profession of your association, you need to define your own success based on what is best for you and the association you represent. This is especially necessary as you define what success means for local chapters within your association. This will likely shift based on the needs of each chapter you are partnered with.

There are multiple ways to go about creating the definition of chapter success. On the one hand you can come up with measurable activities or results for each chapter to report on, such as 10% annual increase in membership or 15% increase in revenues. On the other hand, you could try to get a sense of whether or not the local members feel like they are getting value from the chapter or if the leaders on the board are happy, frustrated, fulfilled, motivated, or dejected. These are all subjective and can vary from member to member and from leader to leader.

IN THIS CHAPTER

Chapter 1 offers an interconnected 3-stage formula for defining, achieving, and sustaining chapter success. Basically, how you **set your goals**, initially meet your goals, and keep meeting your goals time and again.



DESIGN AND MEASURE THE “DEFINITION” OF SUCCESS

A definition must be established, even if it varies from year to year as milestones are reached and goals change. Measuring the success of the chapter can be in the form of a [survey](#), asking pointed yet open-ended subjective questions, allowing for members to express themselves fully. For objective measurements, providing choices for members to select the best answer

allows you to obtain the concrete metrics that specifically address your stated goals and can be compared back to the goals to determine chapter success. Setting these definitions ahead of time ensures that the outcomes are capturing the meaning of success that you wish to convey. From the national perspective, activity level of local chapters becomes the key aspect for

determining success that will trickle up from chapter to national. This can be measured using either objective or subjective methods, but focusing on objective measurements of outcomes is often the best and more meaningful to capturing levels of chapter success. In fact, this [Chapter Evaluation Survey](#) can be used by nationals to identify the pain points of local chapters.



DESIGN AND MEASURE THE “DEFINITION” OF SUCCESS (CONTINUED)

 / Nationals / Surveys

CHAPTER EVALUATION SURVEY

A NATIONAL PERSPECTIVE

Activity levels of local chapters become the key aspect for determining success that will trickle up from chapter to national.

This Chapter Evaluation Survey is an objective measurement of outcomes and is often the best and more meaningful to capturing levels of chapter success. It is used by nationals to identify the pain points of local chapters.

Instructions: Distribute the Chapter Evaluation Survey among local chapter leaders

Respondent Information

Name (Optional) _____

Board position of person taking survey _____

Time spent in this position _____

Other positions held _____

Total time on board _____

Average time spent per month in volunteer work _____



Chapter Data

Chapter name _____

Website URL _____



Some key questions to ask:

- + Do the chapters hold regular meetings?
- + How many members attend chapter meetings on a consistent basis?
- + How many non-member guests attend chapter meetings on a consistent basis?
- + Do board members actively recruit new volunteers to serve on committees and fill open board positions?
- + What is the chapter's level of turnover for board positions?
- + Is the chapter's membership growing and by how much?
- + Does the chapter meet/exceed its budget demands for supporting high quality events, meetings, classes, etc.?
- + Is the chapter on brand in terms of website, events and budget?
- + Does the chapter develop and send professional communications (newsletters and emails)?
- + Does the chapter provide accurate and consistent reports for national?
- + How much help does the chapter need throughout the year from national?

DESIGN AND MEASURE THE “DEFINITION” OF SUCCESS (CONTINUED)

For the subjective dimensions of success, members and volunteer leaders can be polled using a scale of 1-5 that captures people’s sentiments to provide insight into the feel of the chapter – and thus their perceived success among the members. Questions addressing the ease or difficulty of planning, enjoyment of presentations, and whether an attendee would come again provide subjective information about how a chapter is meeting the needs of their membership and thus their stated goals.

Nationals can also complete 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 goal associated with what you and your chapter call success is only the first step in to reaching the positive outcomes desired for local chapters. Finding the path to reach a growing and sustainable success is the second step.



I don’t know what we would do without StarChapter! As a volunteer-based organization, our chapter relies on StarChapter’s capabilities and services on a daily basis. Whether it’s about creating an event, sending a mass email/survey, or creating an email distribution list; volunteers from our chapter highly rely on StarChapter. We have achieved so much in the last 5-6 years. Our membership has grown, attendance to our monthly events has increased, members are satisfied with our website and communication channels.

— Vish Tripathi, President
PMI Metro St. Louis Chapter

FINDING THE ROAD TO SUCCESS

If your association is not where it needs to be in regards to defined chapter success outcomes, then form a roadmap to get there. Like with any map, know your actual starting point. Once the look of a successful chapter is mapped out then a clear path to what is wanted must be established. Creating a survey is a helpful way to fill in some of the answers. Even with answers found in a survey, there will still be times that an educated guess is needed regarding both the current state of affairs and possible course of action. Most guesses are relatively close to the truth and shed light on what exactly needs to be done to achieve success. To affect this change, it will come through some policy updates, introducing new technology,

updating services, enhancements in training and education, and developing promotional avenues. Successful chapters in hundreds of associations today are utilizing online member-friendly software solutions that were specifically designed for this purpose. The services and training also come as part of the software benefits. Promoting to chapters through developed partnerships then becomes very easy to fulfill.

Now that you have defined your idea of success, developed how to measure it, and laid out a plan to get there, sustaining and increasing your success levels is the third stage.

Successful chapters in hundreds of associations today are utilizing online member-friendly software solutions that were specifically designed for this purpose.



Our members are ecstatic about StarChapter website. Moving away from Excel to StarChapter has helped our organization in unprecedented ways.

— Norval Broome
Kappa Alpha Psi Stockbridge-Jonesboro Alumni

SUSTAINABILITY OF SUCCESS

To maintain a steady rate of growth, it is necessary to introduce technology that will allow for data reporting both in real time and over time to help leaders evaluate performance. Figuring out which reports and metrics to measure by, might depend on the association's needs and strategic goal, but most are some combination of membership levels, non-member levels, retention reports, event attendance, and revenues generated through dues, events, sale of products, and sponsorships.

Measuring trends chapter-to-chapter will guide efforts throughout the year to support and sustain desired growth and outcomes. Of

course, sustaining success can be difficult when chapter leaders change every one or two years. They move from position to position, come on the board, and go off the board. There needs to be a plan in place to provide assistance with the transitions as they happen each year – to ensure that the chapter continues to meet their defined goals. Of central importance to this is [training](#), both in how to do the job on the board and how to use technology that makes doing the job more efficient. Make sure the training schedule is consistent and practical as it needs to speak to various roles and leadership responsibilities within each chapter.

SUSTAINABILITY OF SUCCESS (CONTINUED)

It is vital to periodically redefine what success looks like, especially as you achieve each new milestone of success. And communication is central to this process. Providing accurate feedback to each chapter is necessary for continued success. Nationals should provide some sort of praise, award, or rating system to recognize success and to flag potential problems early on. Measuring along the way with accurate reports will allow all of these activities to flourish and achieve sustainable levels of success.

When doing the same things over and over again, you'll get the same results, so something

has to change. The good news is that you don't have to reinvent the wheel. Achieving chapter and national success is more than possible when you first define what success means for your national association and each chapter, then create a path to reach the outcomes that represent the defined success, and continually reevaluate the definition for sustainability. By establishing unique partnerships with each chapters to find the best tools and measurement metrics, you can take success to new heights by cementing your association's value for its members.



I have found StarChapter to be the most comprehensive and cost effective online software in the market. StarChapter is user friendly for both members and administrators. Customer support is great and highly responsive. Training and resources for administrators and board members are excellent.

— Pearl Ford-Fyffe,
Executive Director
AAF Tucson

Schedule an introductory online meeting today!

[Click Here](#) to schedule the best time or
send an email to nationals@starchapter.com



CHAPTER 2
**PROVIDING
ASSOCIATION VALUE
FOR CHAPTER SUCCESS**

“Uncovering what members think the value of your association is and what they believe it provides is the first step in crafting a member-centric way to express why they should be members.”

Carolyn Schwaar, Editor
REALTOR AE Magazine

SOME OF THE MEMBERSHIP VALUE will be realized through national directly and some will be through activities at the local chapter level, including organizing speakers, providing training, offering opportunities for volunteer leadership roles, and rewards for engaged members of all types. Understanding where the divide lays, as well as on what members classify as the best benefits, is important so you could focus on the right areas and let the chapter do what it does best locally.

IN THIS CHAPTER

Chapter 2 develops comparatives are with regard to 3 significant association aspects: news and action, logistics, and clarity of message. Specifically, how each impacts the association's value consideration at the national versus the chapter levels.





Value is a highly subjective word, but it is essential for understanding both in terms of what national and a local chapter offers to its members. It is through the created value that members join, stay, and become leaders. Ultimately, the value national provides includes a well-known brand recognition for career development, while the local chapters provide on-the-ground benefits in terms of networking and education opportunities.

Broken down a bit further, national values may include:

- + Industry/professional education
- + Professional development
- + Certification
- + Legislative action
- + Networking
- + Social/entertainment
- + Career advancement
- + Social impact or community involvement
- + Brand recognition for membership.

NEWS AND ACTION

It cannot be stressed enough how sharing information with membership is essential to chapter success. But so too is the actual engagement taken to create some outcome. This speaks to all sorts of news and actions that will involve the key aspects of communication, either on a website, in a blog, in a newsletter, or via email. Sometimes this might include the work the association does to drive legislation change or it might be the tracking of certification processes for members. In any case, communication needs to flow in both directions – from national to chapter and vice versa. Many combinations of offered value options exist with regard to news and action, so it is

important to map out your membership benefits in this area and understand their relationships at both chapter and national levels. Some examples of benefits involve certification, networking, training, and leadership opportunities. The list of benefits is truly endless but should be focused around the message of your association and the needs of your members.

Benefits mapping not only tells you what benefits are provided for members, but also how they play out for members and at what level. For instance, with regard to legislation at the federal or state level, as the national you want to keep all parties informed about what is going on with regard to law 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.

Trainings 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 scored or recorded nationally. This is important but may speak more to logistics issues.



Now when the national and chapters use StarChapter as 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 and Committee Success
GBTA

LOGISTICS

Communication is likely the most important aspect regarding the value of membership in any association. Regardless of local 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 should each be used.

There are many choices to consider regarding logistics:

- + National newsletter via email
- + RSS feeds
- + Online newsletter
- + Blog on national website
- + Broadcast email announcements
- + Alerts or invitations to national events and conferences
- + Targeted communication to local leadership only with directives
- + Action items via email
- + Phone conference
- + Webinar
- + Leadership only conferences.

Who sends these is another consideration: local leaders or various staff members at national? And the actual context and purpose of the messaging is of utmost importance as you consider what channel is best to share a message.

Educational professional development aspects can be shared via a multitude of channels. It really depends on who is taking the lead – national or chapter. This exemplifies the reality that there simply isn't just a one directional funnel from the top down. Rather, local chapters need to address issues back up to national via reports, newsletters, and membership data recording. This way, the value of the association as a whole can be realized by members.

CLARITY OF MESSAGE

Developing an association into levels is to provide structure that can meet the needs of member contingency through partially autonomous local chapters. While autonomy is a great thing, ensuring brand continuity within chapters is critical for maintaining value within the association as a whole.

The national should want to ensure local leaders are clear on the message and support the mission, thus minimizing rogue agendas and improving brand consistency. This ties back to communication, in that national should

not only be receiving copies of local chapter newsletters but also reviewing them regularly. This is a good way to make sure the presented message from the local chapter is on point with what national wants to be understood throughout the industry. Without value, membership will not grow. Providing a consistent message both from the top down and the bottom up enhances value for the association over all. Whether you are focused on the context of news and action or seek to clarify the brand, mapping the benefits for

membership encourages growth and sustainable success. How this all plays out with regards to chapter success involves a partnership between national and chapter.

While autonomy is a great thing, ensuring brand continuity within chapters is critical for maintaining value within the association as a whole.

Schedule an introductory online meeting today!

[Click Here](#) to schedule the best time or send an email to nationals@starchapter.com



CHAPTER 3
**THE BEST WAY FOR
CHAPTER SUCCESS**

**LOCAL AUTONOMY
WITHIN THE NATIONAL**

“Before reaching any formal decision on a chapter change, an association has an informal, but perhaps equally important, decision to make: how to involve the chapters themselves in the process of designing their future.”

Joe Rominiecki, Writer
Associations Now

MANAGEMENT OF ASSOCIATIONS AND LOCAL CHAPTERS can take 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. What policies from national must be followed, what policies just encouraged, and what policies can be ignored? How similar should chapters be to one another? Does going from one chapter to another feel like they have the same voice and branding? Finding the balance takes time and will vary from association to association and chapter to chapter.

IN THIS CHAPTER

Chapter 3 offers a two-part look at the importance of autonomy. First, the different types of chapter formations are explored: subservient chapter, weak national headquarters, and balanced autonomy. Next, the pitfalls and problems associated with autonomy are addressed with regard to information and data sharing, leadership training and continuity, and brand consistency.

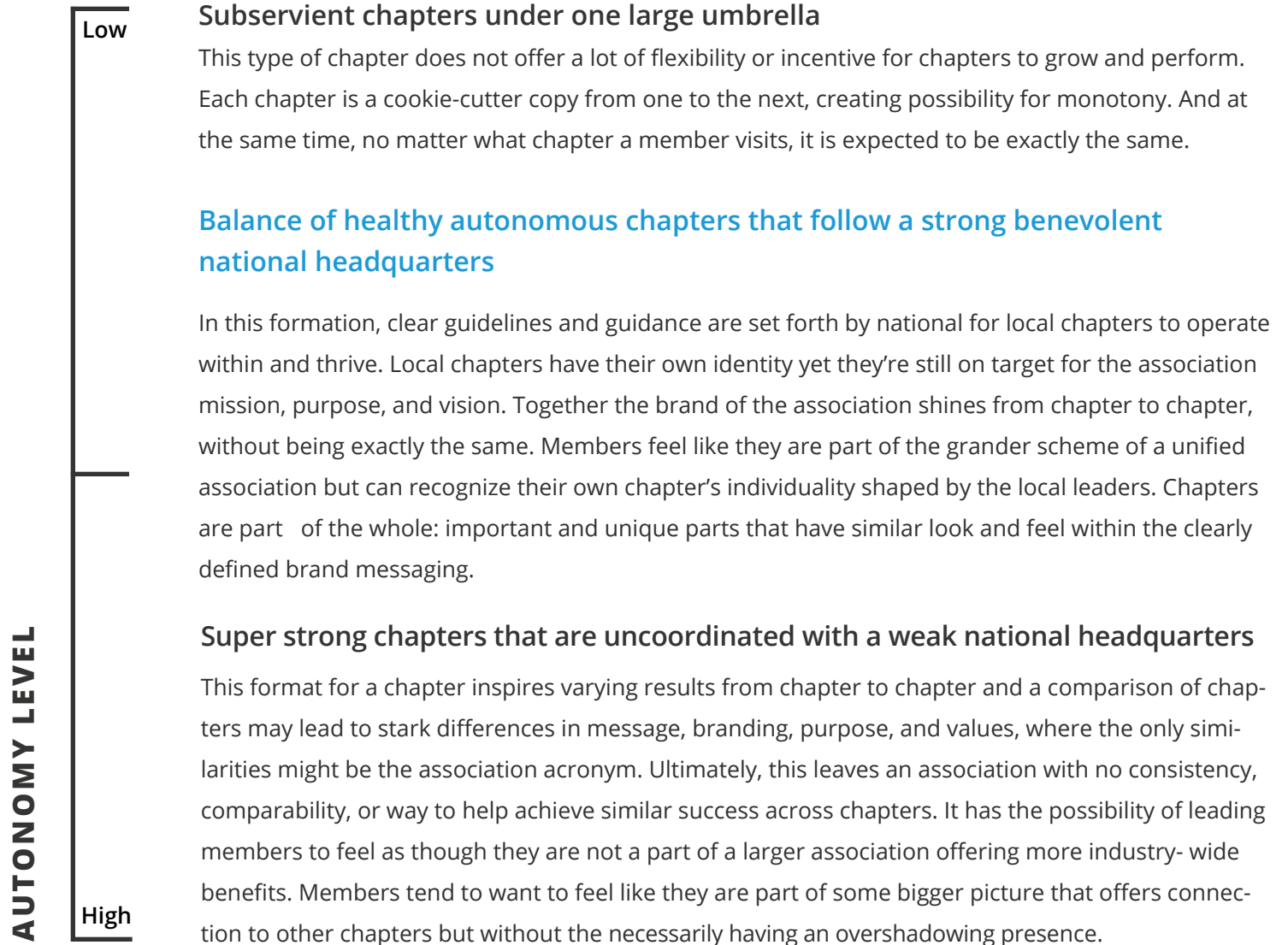
3



CHAPTER FORMATIONS

There is a lot to consider about how to form a chapter, from who makes decisions to how they communicate the mission of the association. Even the needs of the industry might may come into play in the possibility of merging chapters.

3 types of chapter formations:



PITFALLS AND PROBLEMS

Information and data sharing

Member and non-member data needs to flow in both directions: top-down, from national to chapters and bottom-up, from chapters to national. Making sure both national and chapters have data that is up-to-date can be a challenge. Members change jobs and get new phone numbers and emails all the time. Where does the organization find this out? Do they log into national's website and update it there? Do they email it to someone at the national level who then goes to update it? Do they send it locally? There are lots of questions and possible

conflicts that can occur just with member and non-member data sharing. Now add in meeting information, reports, newsletters, articles, attendance, and revenue data to the mix and it quickly spirals out of control.

This is why there is a desire at national to just control everything because allowing local chapters to operate somewhat on their own would seem impossible to manage. But with the right technology, ongoing training, support, and promotion, it can all work out beautifully.

Making sure both national and chapters have data that is up-to-date can be a challenge.



Leadership training and continuity

Local chapters that are successfully managing events, communication, membership, and revenue have strong volunteers who make it happen. This lasts for a while, but the cycle of leadership turns. Each term you either have volunteers getting stuck in a role because no one else can or wants to step in or you have people who do step in but can't achieve the same level of success as their predecessors. Over time, the continuity of chapter success is being put to the test.

Oftentimes, the issue isn't finding people who want to pitch in, volunteer, or step up to lead. The issue stems from the time it takes to "do" the job. Not to mention, having certain technical skills for either web design, email, and spreadsheets can be a tough hurdle to tackle. Finding the right technology and software service alleviates this problem, especially when it combines tools for managing all the aspects of running a successful chapter.



I wanted to transition out of my role with the chapter but after spending time with StarChapter technology, I have decided to stay awhile. I feel pretty confident now with administering the site and am looking forward to moving along the learning curve.

— Brad Patterson
APA Columbus

The issue stems from the time it takes to "do" the job.



Brand consistency

If every chapter runs off and does their own thing, how is it an “association” at all? Even the acronym changes left and right when brand is not consistent throughout the chapters. Visually, members and prospective members need to make that connection so they can understand the structure and purpose of the association. Even when the national team sends out brand specs and guidelines, they are up for interpretation at the local level, which usually

causes friction between the two. Avoiding brand inconsistency caused by local interpretation is another reason why nationals tend to control the whole process. Having the right web-based, member-friendly software service for local chapters to use as a strategic national partner will provide the brand consistency needed while allowing chapters to experience autonomy in their day-to-day activities. Autonomy at the local chapter level is essential

for their success, as long as they stay in line with the national in terms of mission, values, brand, and messaging. Only through working in tandem, sharing data and relying on each other for support in board transitions, can the purpose of the association be achieved. With goals established, values played out, and autonomy guidelines clarified, national can determine exactly what level of support to provide each chapter.



CHAPTER 4

NATIONAL SUPPORT FOR LOCAL CHAPTERS

“Maintaining a positive relationship between an association and its chapters or components requires a lot of effort, day in and day out, and it’s a job that’s bound to run into speed bumps from time to time.”

Joe Rominiecki, Writer
Associations Now

LOCAL CHAPTERS need support from the national association whose values 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 without an overreaching hand dictating every move. It is in this way that all members can realize the greatest value for their local participation in a national association.

IN THIS CHAPTER

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

4

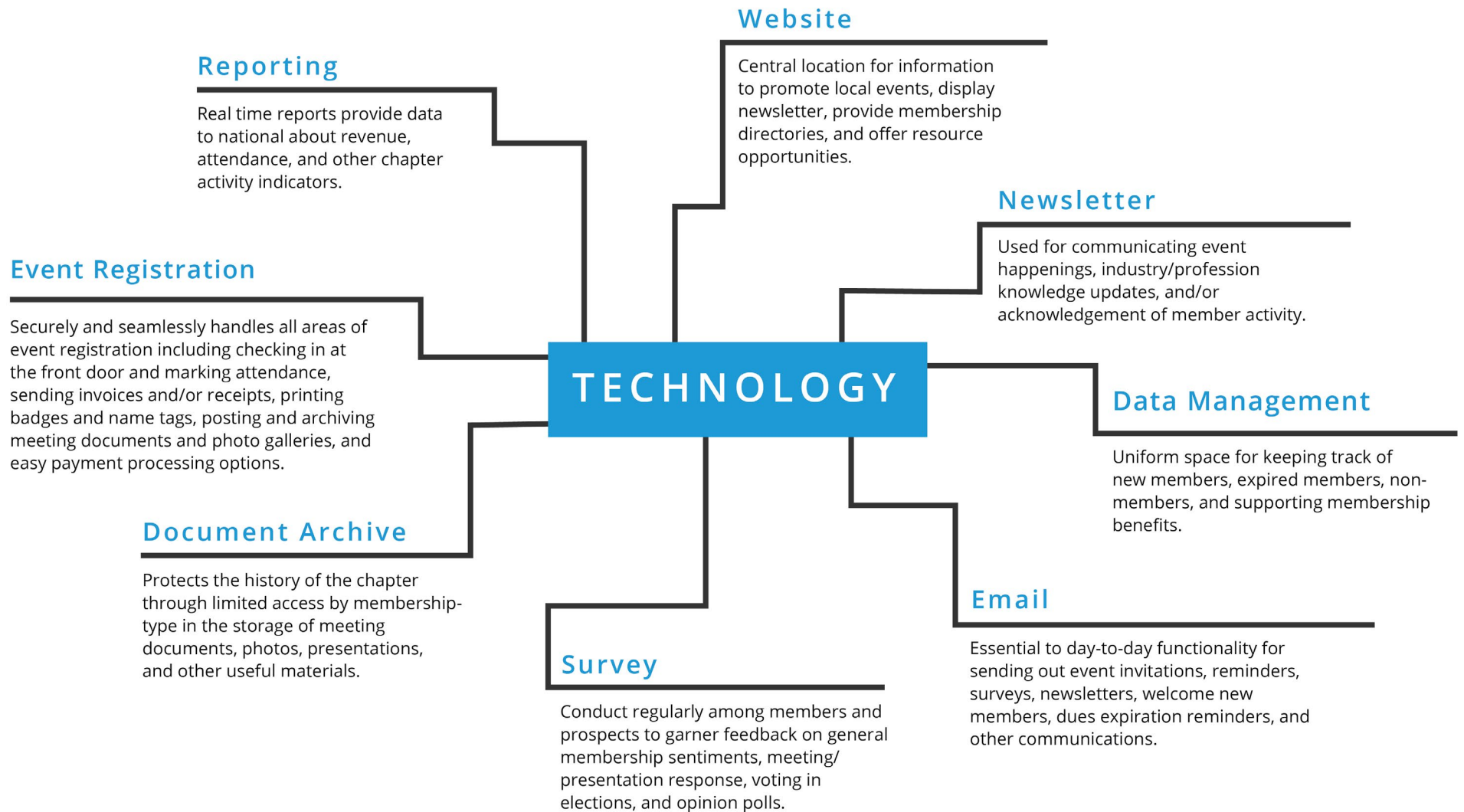


TECHNOLOGY SERVICE AT THE LOCAL LEVEL

Chapters do a lot of good work creating value for their members. To do so, volunteers must be certain to 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.



THE 4 SUPPORT MODELS FROM NATIONAL TO LOCAL CHAPTERS

Four models exist offering the national association options regarding how to provide support to each local chapter. Each model has pros and cons, but one is more likely to be more effective with a chapter formation focused on autonomy.

- 1 Fend for Yourself Model**
- 2 Total Control Model**
- 3 Shared Cost Model**
- 4 Strategic Partner Model**



Anyone who participates in an organization, charitable or industry-related, will really want to jump on board with this software. From meeting announcements to photo galleries, registration, member roster admin, and most importantly - website maintenance and updating this has it all. Once you know the navigation through the various sections, you won't change to anything else. Even if you get stuck or have an issue the StarChapter service is spot on with replies/solutions. I highly recommend it. Good stuff.

— John Walik, Webmaster, Editor
ASHRAE Houston



1. Fend for Yourself 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 to spend 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 take the hit. Maybe they'll spend way too much on one

solution leaving them cash poor for others. For example, putting all their budget into a website design but nothing left for email communication or event registration. Under the Fend for Yourself Model, spending too much time and money on a solution that doesn't work might also discourage current and potential members from joining the board, which will in turn 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 from adding a new department or increased strain on existing staff trying to maintain the effort in addition to their current workload. It can also cause a bottleneck of work to be done or help given if all the chapters need something done right away. This

could lead to a drop in update efficiency with regard to meetings that have passed, news that is old, or inaccurate data. Email delivery could also be hindered if chapters had to wait for national to handle sending. In other words, the benefits of the Total Control Model might be overshadowed by these drawbacks of inefficient technology. The inefficiency over time can cause resentment or frustration at the local level toward the national, which is not good for anyone.

3. Shared Cost Model

This model involves sharing the costs across all chapters.

National can make an investment in technology that will allow for better chapter management. They may pay for it upfront, with enrolling chapters sharing in the actual cost, which is determined by taking an average cost based on many variables, including volunteer/staff time contribution, actual financial output, and

resources/ expertise required. Then, each chapter pays their cut of the cost, whether reimbursing national or an ongoing expense. The Shared Cost Model implies a partnership of sorts, but the extent of the support will be determined by whether they recommend or require a technology.

4. 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 4 key ways:

- a. A strategic technology partner
- b. Continual Support
- c. Goal alignment means successful chapters
- d. Long Term Relationships

Strategic Partner Model Break Down

a. A strategic technology partner

A balance can be struck using the right technology partner. All of the above mentioned features or services can be provided to the local chapter in a consistent way. 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 the 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 is real-time and accurate.



Other than a saving of almost \$18,000 in the last 4-5 years on credit card charges, our chapter was able to automate some of the processes, leading to an 11% membership growth and saving of volunteers' time. Volunteers are now able to focus on strategic goals instead of redundant tasks. StarChapter provides the functionalities at a very competitive rate allowing us to become more efficient and productive.

— Vish Tripathi, President
PMI Metro St. Louis Chapter

Strategic Partner Model Break Down (Continued)

b. Continual support

Not just general technical support for the software but support with an understanding of how the software 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 vendor will know how to guide new leaders and keep their chapters on the path for success.



I've been working with Star Chapter for 5+ years and we have moved from one client to 18 clients on the system. It is easy to use and affordable. The support team is what keeps my staff on top of changes and creative solutions.

— Logan Beszterda
AMC - Association Management Consultants, LLC

c. Goal alignment means happy successful chapters

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.

Strategic Partner Model Break Down (Continued)

d. Long term relationship

When a partnership is created between national and chapter it is sustainable for the long term. And 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 from a place of stability.



We want to thank StarChapter for your help and guidance throughout this migration to the new site. You have made this transition very easy and enjoyable. I've heard nothing but positive from our members. They absolutely LOVE our new site!"

— Brian Gregory, PMP
PMI Rochester

Without support chapters are left struggling to achieve and sustain success. Providing a trustworthy technology vendor gives chapters a viable and cost-effective solution to achieve that success. Best way possible is to have national in the picture – the glue that binds

local chapters to the goal and mission under one brand with multiple parts. Through goal alignment, continuous support, and a long term relationship, developing strategic partnerships is good for the association.

CHAPTER 5

FIXING CHAPTER REPORTING WOES

“With so many platforms to consider, from association management systems to email providers, associations often struggle to keep information organized in the first place. Often, data management is not centralized, with no one person in charge of the association’s data and many people having access to important information.”

Ernie Smith, Writer
Associations Now

FOR SOME CHAPTERS, autonomy remains at the center of their functioning and they really don't want much to do with national. In fact, they might fight all aspect of a potential partnership with national, from honoring brand messaging to following recommendations that may 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 CHAPTER

In this chapter, solutions to ensure local chapters meet a certain level of “minimum” criteria and fulfill obligations with regard to 4 areas related to chapter reporting of data to national. This includes regular data sharing, time commitment, workforce, and accuracy.

5

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:

[Chapter Evaluation Survey](#) and [Chapter Performance Measurement Tool](#)

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:

- 1 Membership Counts**
Actual number records need to be provided about membership levels month-to-month.
- 2 Prospective Data**
Trends in the non-member/prospect levels.
- 3 Meeting Revenue**
Broken down by payment type, this is the registration totals by member/non-member, and unpaid items.
- 4 Meeting Attendance**
Who has showed up at the most meetings in a given date range and who is missing meetings.

TIME COMMITMENT

Talk to the chapter about how much time they are spending gathering the regularly needed bare minimum of information. 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. And 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. With 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 perception. Ultimately, information is gathered but not always in the same way or format, making it difficult to have comparatives from one month to another, and out of which to draw conclusions for the future.



If a chapter spent an average of 20 minutes per week generating a report from national and then importing that into their software vendor that's about 17 hours per year needed. We are now able to accomplish this with practically 0 minutes used and update twice a day!

— Brian Unrein, IT Manager
ASHRAE



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 make it up 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.



If you find reasons to perform tasks you can develop confidence at the various sections within StarChapter. The site features on the website also allow us to easily track attendance and look for trends to better plan for future programs. StarChapter also allowed our board to easily manage our membership database and reduce the amount of billable hours with our association management firm.

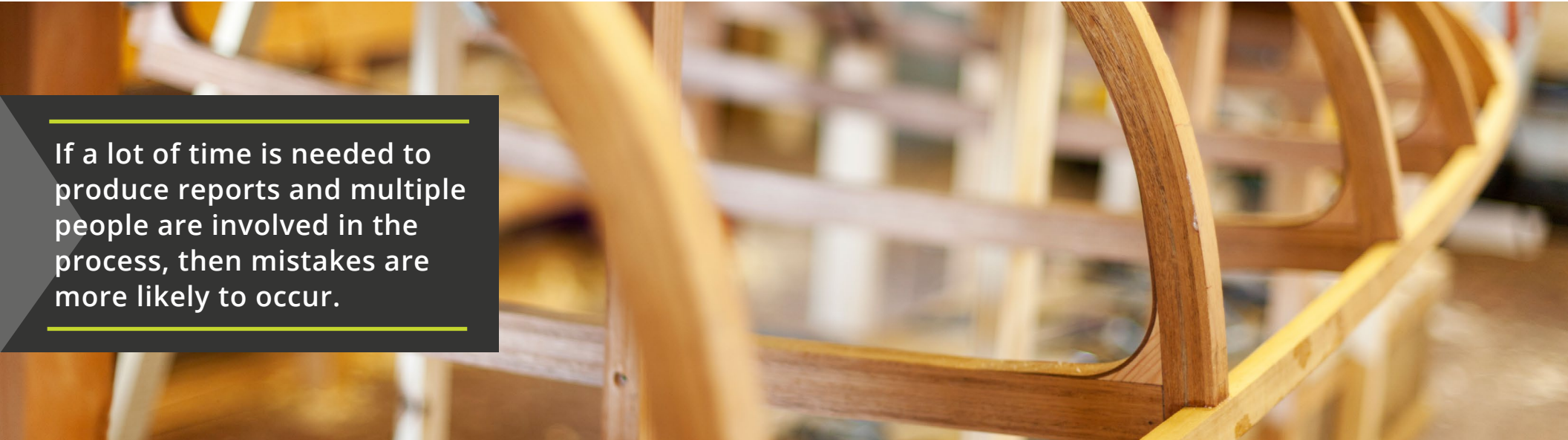
— Board
Columbia SHRM

ACCURACY

With so many hands in the mix, manually entering data risks inaccuracies. Errors are part of the process and are worse when manually completing the task. 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. When not caught in time, these errors can create problems up the chain. This also makes it difficult to compare across chapters and months within the same chapter. Tracking goal completion for measuring chapter success then becomes difficult.

Fixing these problems is easy and will allow chapters to keep most of their autonomy. By removing the burden of manual data creation, an automated process with technological system makes collecting and reporting data seamless and less time consuming. Yes, the data is still collected by volunteers at the local level where the chapter activity is taking place, but it 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, newsletter, surveys, membership and non-member management, and the training and support to use it, all of the reporting can be standardized and automated for the most part. The time it takes to generate changes is either no time at all or just a few minutes. Autonomy is maintained while data is collected and stored just like other chapters for the ease of reporting to national. National can then measure success for both the chapter and the association as a whole by examining the key data points necessary for goal achievement.



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.

CHAPTER 6

CONCLUSION: VALUE REALIZED THROUGH AUTONOMY AND SUPPORT

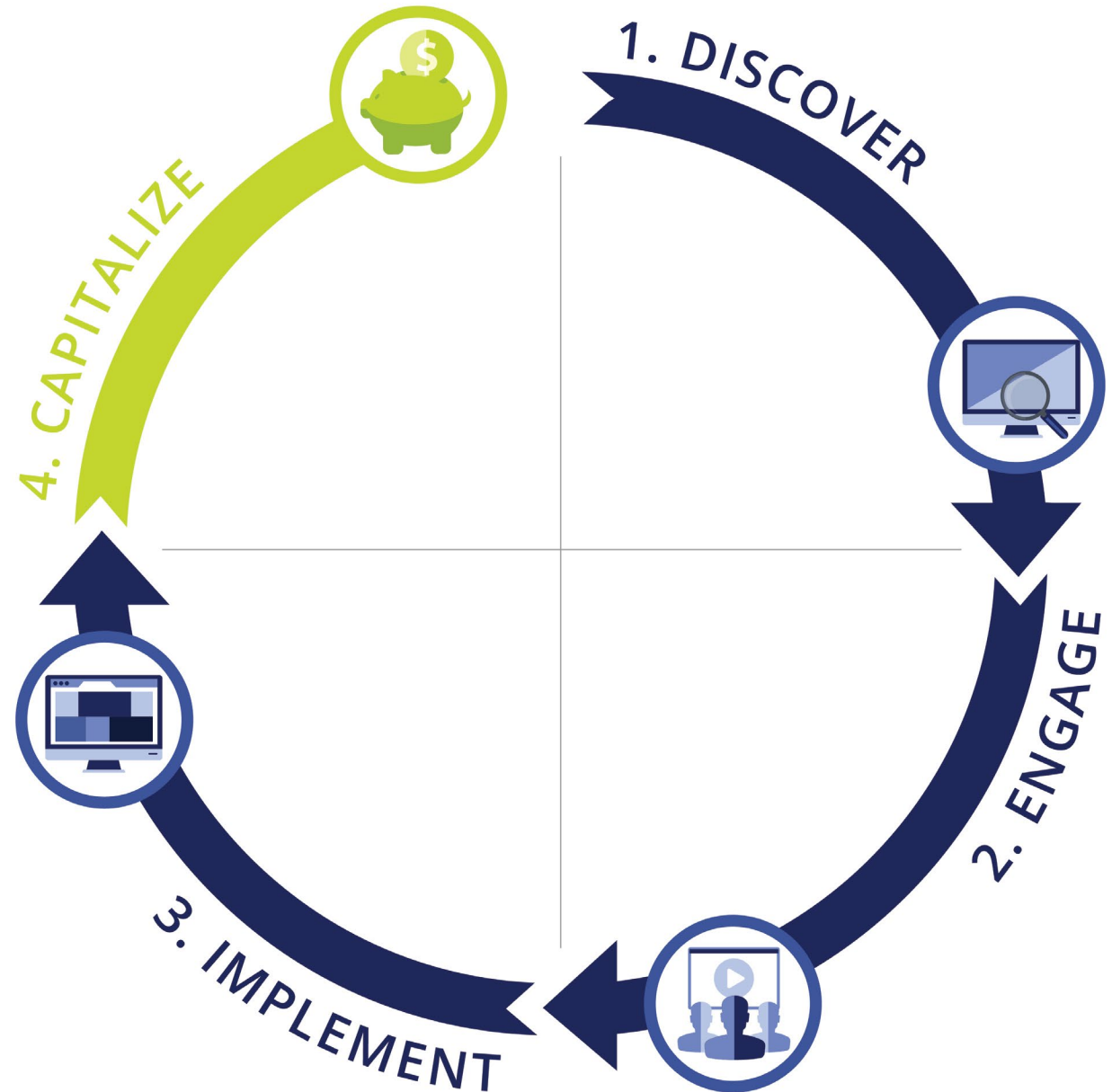
“Very capable and helpful website functionality. It supports all chapter needs. Specific questions to Tech Support are answered VERY fast and by humans, not cut-n-paste responses.”

Edward Davis, Webmaster & Communications Chair
ASHRAE Triangle

CONCLUSION

The national may take and process all the membership dues, but the members live in local areas (and the local chapter is where they realize 80% of their membership benefits). It could be the local networking event, social aspect, or the educational professional development classes held downtown. There is local news and happenings, local members are getting recognized and mentioned. There are also the community efforts being made for outreach. Sometimes there are cross-promoted events with other related organizations. The list is endless.

There is no need for the chicken and the egg discussion. Start with the chapters and make them successful. If you provide the right tools, structure, support, and incentives, chapters should grow in membership and that should increase the dues and non-dues revenue for the association as a whole.



CONCLUSION (CONTINUED)

The tools are the technology used to run chapter's daily activities such as website, newsletter, email, events, surveys, membership list management, and more. Working with the right strategic technology partner will provide the highest level of efficiency and consistency and long term support needed to attain real growth and stability. The right partner will not only have your association's goals in mind, but also experience dealing with other associations with a chapter-based structure. The right partner will offer not only the technical support 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 strategic technology partner that is well suited to provide chapters with needed services and support as well as data and communication sharing with national with a track record for success.

Finally, establish a goal for a healthy balance of local autonomy and national control. Chapters need tools to function and grow and the 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.

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ASHRAE

AMERICAN SOCIETY OF HEATING, REFRIGERATING
AND AIR-CONDITIONING ENGINEERS



Saving time and cost while producing automated daily reports through the collaboration with StarChapter for an auto-import feature.

The American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) sought out a software vendor that would enhance their work through more efficient member data management. The new StarChapter auto-import feature provided ASHRAE a viable software option while allowing local chapters to maintain autonomy in how they manage their member data.

Objective:

ASHRAE national was looking for a software vendor that would help local chapter leaders manage member records more efficiently

Determining Factors:

1. Automated data updates with specific focus on saving time for local chapter leaders
2. Local chapters maintain autonomy in how they manage member data

Result:

20% chapter participation in the new StarChapter auto-import feature in just a few weeks

Keys to Success:

1. Focused purpose
2. Chapter enrollment flexibility

Objective

ASHRAE national was looking for a software vendor that would help achieve two goals:

1. Reduce the time spent by chapter officers to keep member information up-to-date on their chapter site.
2. Increase the frequency at which member data was refreshed on the chapter site.

Strategy

ASHRAE chapters already using StarChapter reached out to the national to request membership integration between chapter and national databases. Before reaching out to StarChapter, ASHRAE national explored options with other association management software (AMS) vendors.

ASHRAE was impressed with the new StarChapter auto-import feature and encouraged their chapters to enroll with StarChapter as their chapter management software vendor.

Favorite feature: Automation of data integration between ASHRAE national and chapters – saving time for chapter officers.

Automated status updates eliminates the need to manually import reports into the chapter website. This allows for member data to be kept up-to-date with regular and automated updates twice a day at 7am and 1pm Eastern Time. The update also includes information regarding whether or not chapter dues have been paid to ASHRAE national, overcoming any lag time issues previously experienced in the process of reconciling member dues.



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, our members likely have more time to plant a tree and rescue a puppy. StarChapter has made the world a better place thanks to their comprehensive tools and their ability to automate.

- Brian Unrein, IT Manager
ASHRAE

ASHRAE national continues to provide details about the auto-import feature with StarChapter. Essentially, the final decision to sign on with StarChapter is left to local chapter leaders as enrollment requires chapter consent. Keeping the choice optional for local chapters allows for autonomy of the chapters while adhering to national guidelines

Determining Factors

- 1 Automated data updates with specific focus on saving time for local chapter leaders.
- 2 Local chapter maintain autonomy in how they manage member data.



Very capable and helpful website functionality. It supports all a club needs from a website to operate. Layout is orderly. Specific questions to Tech Support are answered VERY fast, and by humans, not cut-n-paste responses. I especially like the functionality that supports an annual changing of officers/admins that typically happens in a club.

R. Edward Davis, PE LEED_AP, Webmaster & Communications Chair
ASHRAE Triangle

Results

Upon launching the new StarChapter auto-import feature, ASHRAE national reached a 20% participation rate from chapters within just a couple weeks. This number is expected to grow over time.



If a chapter spent an average of 20 minutes per week generating a report from national and then importing that into their software vendor that's about 17 hours per year needed. We are now able to accomplish this with practically 0 minutes used and update twice a day!

- Brian Unrein, IT Manager
ASHRAE

Time is saved, but so are costs since collaborating with StarChapter means less work with other vendors and less financial output.



Anyone who participates in an organization, charitable or industry-related, will really want to jump on board with this software. From meeting announcements to photo galleries, registration, member roster admin, and most importantly - website maintenance and updating this has it all. Once you know the navigation through the various sections, you won't change to anything else. Even if you get stuck or have an issue the StarChapter service is spot on with replies/solutions. I highly recommend it. Good stuff.

- John Walik, Webmaster, Editor
ASHRAE Houston

Keys to Success

- 1 Focused purpose.**

ASHRAE national had a clear and focused mission in mind: to achieve a faster and more efficient method of sharing data between the ASHRAE national and local chapters – a need that arose from local chapters. The new StarChapter auto-import feature fit the bill perfectly, allowing chapter leaders more time to plan chapter activities and less time doing the repetitive tasks.
- 2 Chapter enrollment flexibility.**

By making enrollment an option rather than a requirement, ASHRAE national left the autonomy in the hands of chapter leaders. Knowing they have a choice in the matter empowers the local leaders and builds trust between national and chapters. As the time is right for them, chapters can enroll in the service.

The Bottom Line

By signing an exclusive vendor agreement with StarChapter, the Global Business Travel Association as a whole has benefited from providing a single technology vendor to all their chapters in the North America region. Beyond helping chapters improve performance over time, GBTA has been able to offer their chapters a stable platform with ongoing and included technical support – a platform that brings the chapters together for the success of the association.



About ASHRAE

ASHRAE, founded in 1894, is a global society advancing human well-being through sustainable technology for the built environment. The Society and its members focus on building systems, energy efficiency, indoor air quality, refrigeration and sustainability within the industry. Through research, standards writing, publishing and continuing education, ASHRAE shapes tomorrow's built environment today. ASHRAE was formed as the American Society of Heating, Refrigerating and Air-Conditioning Engineers by the merger in 1959 of American Society of Heating and Air-Conditioning Engineers (ASHAE) founded in 1894 and The American Society of Refrigerating Engineers (ASRE) founded in 1904.

Source: <https://ashrae.org/about-ashrae>

About StarChapter



StarChapter is a member-friendly association software company serving local chapters across the United States and Canada. StarChapter's mission is to help local leaders of national associations grow their chapter's attendance, membership, and revenue and achieve lasting board productivity even when the board changes. Our software provides event registration, membership, communication, website management, web services, and eCommerce features as well as responsive website layouts, dedicated StarChapter specialists, 24/7 online support, phone support, and ongoing board training webinars.

Source: www.starchapter.com

Visit our website to learn more!

[Click Here](#)

www.starchapter.com | nationals@starchapter.com | 1-866-775-3205

GBTA

GLOBAL BUSINESS TRAVEL ASSOCIATION



Building a unified data management experience between local chapters and the national association through an all access membership plan.

Local chapters of the Global Business Travel Association (GBTA) across the North American Region were using different and multiple technology platforms, making it difficult to share information. GBTA sought a cost-efficient flexible solution to their data sharing needs so they could more effectively achieve their goals at both the national and local level. Several chapters were already using StarChapter, which made it an attractive option to consider and then implement.

Objective:

Create a standardized look and feel for all local chapters as well as improve data integration

Determining Factors:

- 1. Cost
- 2. Collaboration
- 3. Existing use by chapters
- 4. Technical support

Result:

A large majority of chapters are currently participating

Keys to Success:

- 1. Communication
- 2. Unification across chapters
- 3. Cost-efficient software solution for national and local chapters

Objective

The Global Business Travel Association (GBTA) sought to integrate the chapters and GBTA membership into a cohesive system for a single purchase process, allowing for a seamless transmission of membership data from GBTA national to a specific local chapter – all while maintaining a standardized look across the platform.

Strategy

In the past, local GBTA chapters used 3 different software vendors, making it cumbersome to share data, especially data about membership. It took extra time and created greater possibility for data errors when reentering it into different systems. The StarChapter platform allows for membership integration between chapters and GBTA to quickly share data once it changes, without the need to “transfer” between systems. StarChapter has already been in place for some chapters, which gave national insight into its viability for the GBTA brand as a whole.

GBTA reached out to StarChapter as a reliable software solution to meet their data integration needs. Other association management software (AMS) vendors didn’t offer the same flexibility StarChapter did with regard to developing a tailor-made solution to fit exactly what GBTA was looking for in a platform. Of key importance to GBTA was that the platform was substantial and known to them through utilization by local chapters. As a cost-efficient option in terms of both price and support for GBTA and local chapters, StarChapter offered a viable and technologically sound platform.

Already existing positive experiences from GBTA chapter leaders enhanced the recognition of the benefits of StarChapter’s platform in comparison to other potential solutions.

Favorite feature: The real-time, two-way integration of membership data synchronization between chapters and national.

GBTA signed up for StarChapter Portfolio, a product developed especially for national leadership to gain access to real-time, aggregated results. Based on requirements and guidelines provided by GBTA, StarChapter provided a platform and designed a standard website template, including 3 pre-approved design options for local chapters using StarChapter.

Determining Factors

1 Cost

Having a streamlined and cohesive system allows for information to be shared more quickly and efficiently, saving both time and money. Without the need for multiple vendors, GBTA's monthly output for technology was reduced. By having StarChapter's system in place, GBTA chapters increased revenues through improved membership retention, event attendance, and attracting new members.

2 Collaboration

StarChapter collaborated with GBTA's national leadership to develop a system that fit GBTA's unique needs for data integration rather than expecting GBTA to fit inside a predetermined box.



When we were looking at other AMS vendors, StarChapter was excited by the opportunity to come outside of the initial box to develop a more tailored solution which will fit what GBTA was looking for, where other vendors were more inflexible.

– Patrick Algyer, Manager, Chapter and Committee Success
GBTA

3 Existing use by local chapters

For GBTA, the fact that local chapters were already using StarChapter made this process easier since StarChapter was already vetted by members in the same occupation with the similar goals for participation in GBTA. Ultimately, it allowed for a seamless transition with guidance from fellow members and StarChapter customer support – creating a partnership within the GBTA brand as well as with StarChapter.

4 Technical support

GBTA needed a platform that would provide ongoing support and training to its staff and volunteers. They wanted to know that they were not being left to fend for themselves if problems arose, especially during board transitions. StarChapter exceeded their expectation, in that the technical support GBTA receives from StarChapter is included in their package, rather than as the hourly add-on other vendors offered.



“GREAT customer Service. I LOVE StarChapter they are always super-fast with responses.

– Kevin Dombrow, IT Board Director
Michigan Business Travel Association

Results

GBTA has two local levels: chapters and affiliates. GBTA has determined that chapters must use StarChapter's All Access Membership program, while affiliates do not. In order for affiliates to enroll, they have to upgrade and become chapters. GBTA and StarChapter have partnered to transition chapters seamlessly and quickly, reaching 100% chapter enrollment in the program. GBTA anticipates affiliate conversion at some point.

In just 2 years, large majority of chapters have switched to using StarChapter.



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 and Committee Success*
GBTA

GBTA and chapters have seen only positive outcomes of working cohesively on a single platform:

- 1 Both national and chapters can quickly and conveniently share content and best practices.
- 2 Data integration is automated, so they have the most up-to-date information in real-time.
- 3 The manual process is reduced for volunteers, giving them more time to enjoy the activities of their local chapter.
- 4 Both GBTA national and local chapters save money thanks to having one system in place across the board.
- 5 Chapters share the same look and feel, improving the GBTA branding as a whole.



Quick Responses Makes for a Happy Customer. I use StarChapter for both reports and for service requests. I have found the application easy to use to run my own reports. I also need to request PCI compliance scans through your service desk and they are always quick to respond as well as professional and have excellent follow-up.

– Dawn Smith, *Treasurer*
Rocky Mountain Business Travel Association

Keys to Success

1 **Communication**

Early on, GBTA provided chapter leaders information regarding the transition to the StarChapter platform. Maintaining an open dialogue allowed for local chapters to remain aware of decisions made at the national level and showed that GBTA listened to the needs of chapter leaders. Through this, local chapters have received technical training, managed their members and events, and kept the national up-to-date in a timely manner – all in a cohesive and standardized manner.

2 **Unification across chapters**

Basically, bringing everyone to the same platform aims to create standardization and harmonization across the association at all levels. No matter what chapter members belonged to initially, all chapters have the same look and feel. This allows for members to feel comfortable throughout the chapter network, as they each work similarly fulfilling the objectives of the local chapter while remaining in tune with GBTA.

3 **Cost-efficient software solution for national and local chapters**

Introducing and utilizing StarChapter allowed GBTA to eliminate other vendors, thus lowering costs overall. A small technology fee is paid by local chapters as they become integrated into the system. The national offered flexibility through payment plans for smaller chapters to ensure that the cost isn't prohibitive.

The Bottom Line

By signing an exclusive vendor agreement with StarChapter, the Global Business Travel Association as a whole has benefited from providing a single technology vendor to all their chapters in the North America region. Beyond helping chapters improve performance over time, GBTA has been able to offer their chapters a stable platform with ongoing and included technical support – a platform that brings the chapters together for the success of the association.



About GBTA

The Global Business Travel Association (GBTA) is the world's premier business travel and meetings organization headquartered in Washington, D.C. area with operations on six continents. GBTA's 7,000-plus members manage more than \$345 billion of global business travel and meetings expenditures annually. GBTA and the GBTA Foundation deliver world-class education, events, research, advocacy and media to a growing global network of more than 28,000 travel professionals and 125,000 active contacts.

Source: www.gbta.com



About StarChapter

StarChapter is a member-friendly association software company serving local chapters across the United States and Canada. StarChapter's mission is to help local leaders of national associations grow their chapter's attendance, membership, and revenue and achieve lasting board productivity even when the board changes. Our software provides event registration, membership, communication, website management, web services, and eCommerce features as well as responsive website layouts, dedicated StarChapter specialists, 24/7 online support, phone support, and ongoing board training webinars.

Source: www.starchapter.com

Visit our website to learn more!

[Click Here](#)

www.starchapter.com | nationals@starchapter.com | 1-866-775-3205

PMI

PROJECT MANAGEMENT INSTITUTE



Providing prequalified web services vendors to local PMI chapters to ensure reliability of product and efficiency in the chapter buying process.

The Project Management Institute (PMI) reached out to StarChapter as consideration for PMI's Chapter Web Services (CWS) Provider Program. Upon approval, StarChapter became an endorsed vendor, offering PMI chapters a reliable option for their association management software.

Objective:

PMI sought qualified vendors to join their CWS Provider Program and provide web services to PMI's extensive chapter network

Determining Factors:

1. StarChapter met all the criteria set out in the PMI Chapter Web Services (CWS) Provider Program
2. Ease of membership data integration between chapters and PMI national
3. Voluntary enrollment in the SSO integration to access syndicated content

Result:

Increase in membership and reduced costs for chapters utilizing StarChapter compared to performance before using the integration

Keys to Success:

1. Creation of a Syndicated Content Integration
2. Development of a Data Exchange Program
3. Single Sign-On capabilities
4. Availability of Global Search Options across the chapter's and PMI's content

Objective

PMI had the goal of expanding their Chapter Web Services (CWS) Provider Program for the delivery of ongoing web service offerings to PMI's extensive chapter network. PMI sought vendors with association expertise and a professional technical support team to help their chapters work more efficiently and improve results.

Strategy

PMI's team first established the CWS program that set the ground for a vendor evaluation process. Then, since StarChapter was already employed by some PMI chapters, PMI initiated the process with StarChapter and invited the StarChapter team to become an endorsed vendor of web technology to be used by their local chapters. StarChapter went through the extensive evaluation process and met all the criteria to become an endorsed vendor and qualify for the PMI Chapter Website Services (CWS) Provider Program. This included: full event management capabilities, public facing website with global search capabilities, easy-to-manage functionality by non-techy users, flexible page/content layouts, role-based access, payment processing, membership management, and email communication.

Favorite feature: Ease of Single Sign-On integration between chapter and PMI.

Following approval and subsequent entry into PMI's CWS Provider Program, StarChapter attended the PMI Annual Leadership conference in Vancouver, Canada to present their services to local chapters. After launching the program, PMI started promoting StarChapter on their site.



PMI St Louis was one of the very first few chapters to adopt StarChapter and integration of shared membership data with PMI. Our experience was very smooth without any interruption. Data is updated in the wee hours every day and that saves our officers a lot of time in doing the day-today tasks of the chapter.

- Vish Tripathi, President
PMI Metro St. Louis Chapter

Determining Factors

1 **PMI Chapter Web Services (CWS) Provider Program qualified**

PMI evaluated StarChapter's services with local chapter needs in mind, determining that they met all the criteria and standards to become an endorsed vendor for PMI. Requirements included offering full event management capabilities, a public facing website with global search capabilities, easy-to-manage functionality by non-techy users, flexible page/content layouts, role-based access, payment processing, membership management, and email communication.

2 **Ease of membership data integration between chapters and PMI national**

Data between PMI national, who maintains membership data, is automatically updated nightly to local chapters enrolled with StarChapter. This ensures the most current information is available to volunteers when they log into the system.



Since PMI National is the source of membership data, we wanted to be sure that membership data is synced with PMI National on a daily basis. SSO capabilities through StarChapter ensure that membership data at the local chapter level is updated and up-to-date with PMI National.

Vish Tripathi, President
PMI Metro St. Louis Chapter

3 **Voluntary enrollment in the SSO integration**

PMI national has vetted the services of StarChapter, verifying to local chapters that the SSO integration, as well as other chapter management services, are up to par for the needs of the association and chapters. This way, local chapters can make an informed decision regarding their choice to enroll or not.



We want to thank StarChapter for your help and guidance throughout this migration to the new site. Your support and response times have been very good and I truly appreciate it. You have made this transition very easy and enjoyable. I've heard nothing but positive from our members. They absolutely LOVE our new site!

Brian Gregory, PMP
PMI Rochester

Results

Local chapters employing the SSO integration have experienced an increase in membership, lower costs associated with their website, and a reduction of time spent for chapter leadership and board members allowing a refocus of energy on strategizing for chapter growth.



Other than a saving of almost \$18,000 in the last 4-5 years on credit card charges, PMI Metro St. Louis Chapter was able to automate some of the processes which has resulted in 11% membership growth and saving of volunteers' time. Volunteers are now able to focus on strategic goals instead of redundant tasks. For us as a chapter, StarChapter was able to provide most of the functionalities at a very competitive rate. We were able to become more efficient and productive by using these services from the StarChapter.

– Vish Tripathi, President
PMI Metro St. Louis Chapter



StarChapter is a very economical solution that provides lightning-fast service and technical support. Their ticket system raises the bar as far as quality and promptness of service.

– Matt Jaeger
PMI Central Illinois Chapter



We have just switched to the StarChapter product and after group training, one-on-one training, reviewing the training videos and articles, and spending time configuring our new website, I can safely say that it's a great product to use. The main areas I work on are newsletters, web pages and the email manager and the software makes it easy for me to quickly update and create new content. Overall, it's been a great start to my new life with StarChapter.

– Ivan Thomas, VP of Communications
PMI Columbia River Basin Chapter

Keys to Success

- 1 Creation of a Syndicated Content Integration**

StarChapter developed a Syndicated Content Integration to where PMI provides content that seamlessly integrates with local chapters' websites, like PMI Lexicon, Benefits of Membership, Certification, Pulse of the Profession, Standards Library, and PM Network.
- 2 Development of a Data Exchange Program**

By making enrollment an option rather than a requirement, ASHRAE national left the autonomy in the hands of chapter leaders. Knowing they have a choice in the matter empowers the local leaders and builds trust between national and chapters. As the time is right for them, chapters can enroll in the service.
- 3 Single Sign-On capabilities**

When members sign in to the admin area of their chapter's website they have access to the data on the national level, including member-only areas of the StarChapter service and PMI member-only apps (myPMI, VRMS, and CCRS). Members no longer need to maintain multiple login credentials for local chapter and PMI national.
- 4 Availability of Global Search Options**

Chapters joining the SSO integration also benefit from the Global Search option that allows a single search to return results for both within the local chapter website and PMI services.

The Bottom Line

Through approval as a qualified endorsed vendor within PMI's Chapter Web Services (CWS) Provider Program, StarChapter afforded the local chapters a reliable SSO integration platform that saves both time and money through efficient onboarding and implementation processes, ease for board transitions, and continues technical support. This allows for greater focus on membership building strategies rather than redundant chapter operations.



About PMI

Project Management Institute is the world's leading not-for-profit professional membership association for the project, program and portfolio management profession. Founded in 1969, PMI delivers value for more than 2.9 million professionals working in nearly every country in the world through global advocacy, collaboration, education and research. PMI advances careers, improves organizational success and further matures the profession of project management through its globally recognized standards, certifications, resources, tools, academic research, publications, professional development courses, and networking opportunities. As part of the PMI family, Human Systems International (HSI) provides organizational assessment and benchmarking services to leading businesses and government, while ProjectManagement.com and ProjectsAtWork.com create online global communities that deliver more resources, better tools, larger networks and broader perspectives.

Source: <http://www.pmi.org/About-Us.aspx>

About StarChapter



StarChapter is a member-friendly association software company serving local chapters across the United States and Canada. StarChapter's mission is to help local leaders of national associations grow their chapter's attendance, membership, and revenue and achieve lasting board productivity even when the board changes. Our software provides event registration, membership, communication, website management, web services, and eCommerce features as well as responsive website layouts, dedicated StarChapter specialists, 24/7 online support, phone support, and ongoing board training webinars.

Source: www.starchapter.com

Visit our website to learn more!

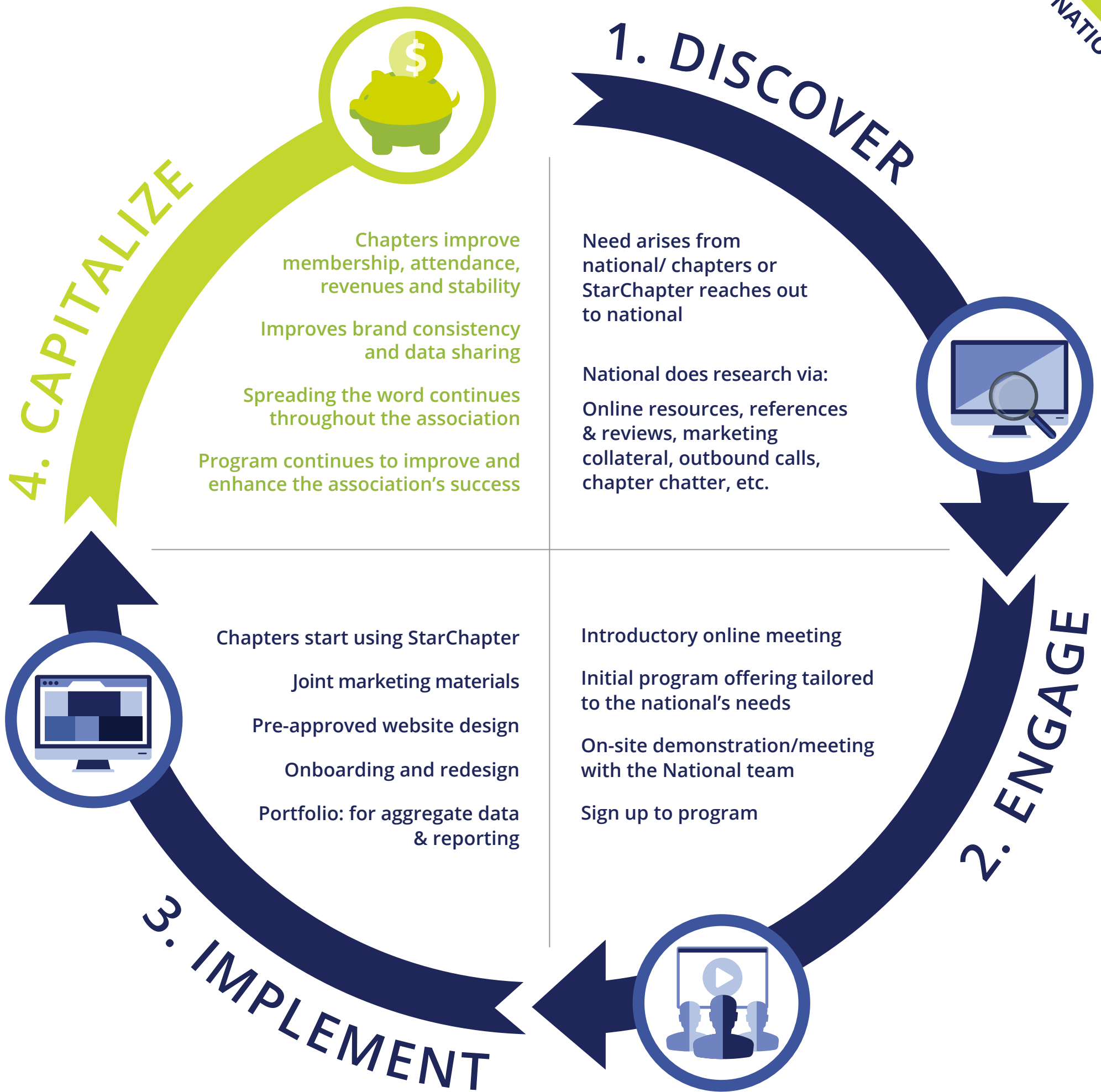
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The **JOURNEY** To Find and Implement Your **ASSOCIATION TECHNOLOGY PARTNER**

Choosing a strategic technology partner can be a long, grueling process. You are tasked with finding a partner that can provide your chapters with the needed services and support as well as data and communication sharing with national. Chapters need the tools to function and grow the support from national but also need the freedom to grow and become a good conduit for channeling association value with a local flair. When both are doing what they do best, the association grows stronger.

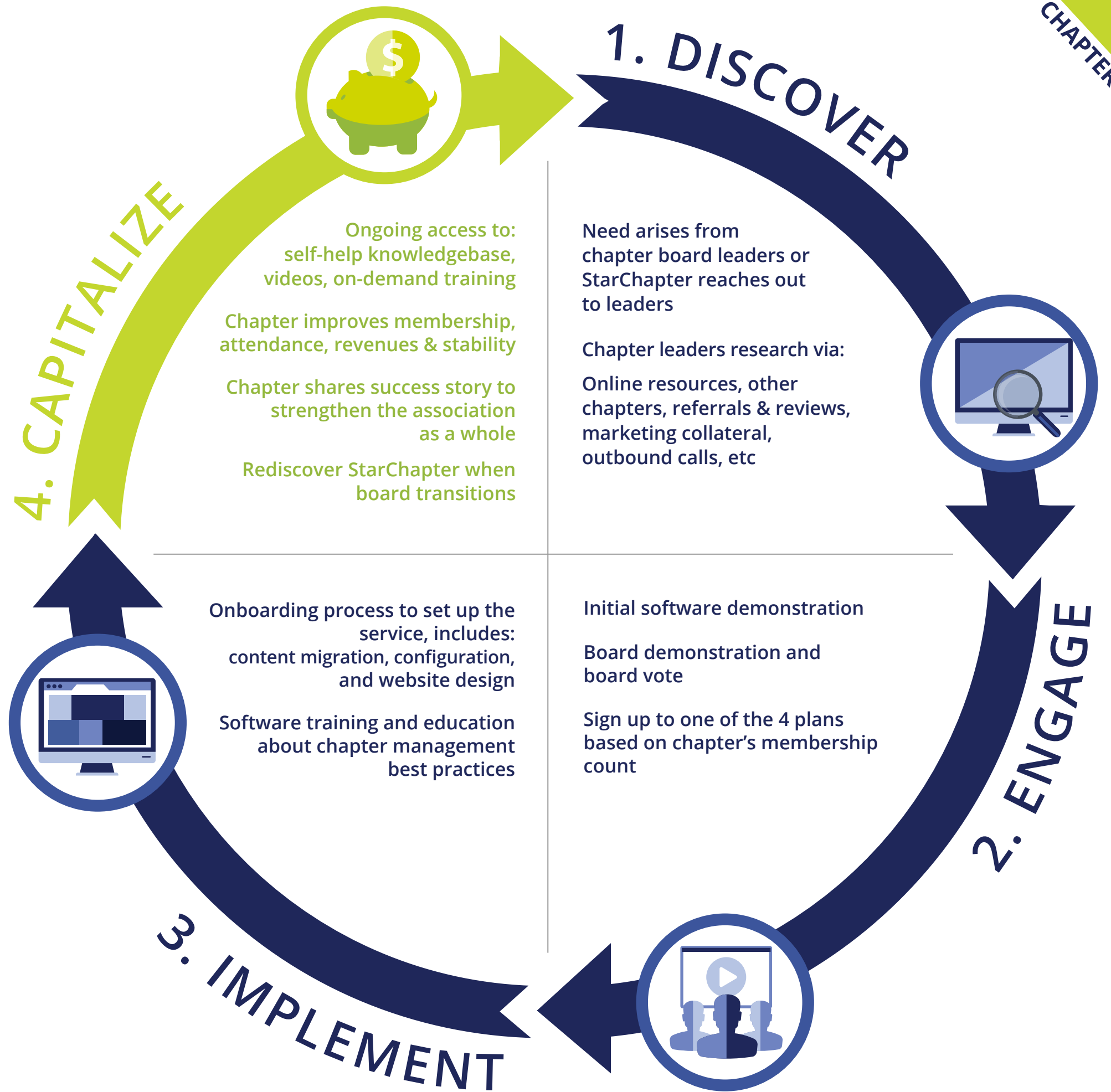
This infographic will help you and your team establish the most efficient process in finding and implementing the best technology partner. From our experience working with dozens of national associations, the process guarantees successful results and a flourishing association.



The **J**OURNEY **CHAPTERS** Take to Reach Success With a **SOFTWARE** **PROVIDER**

In local association chapters, as board volunteers come and go every year or two, the need for a strong, reliable software vendor rises. Chapters need a software with the functionality and services to manage and grow membership, event attendance and revenues as well as a professional support team. When they find a vendor that offers both functionality and support in affordable prices, chapters can quickly reap the benefits and grow stronger.

This infographic illustrates the journey in which local chapter leaders embark when reaching success using a chapter management software vendor. This process has been proven to be efficient time and time again after working with tens of thousands of association professionals.



CHAPTER EVALUATION SURVEY

A NATIONAL PERSPECTIVE

Activity levels of local chapters become the key aspect for determining success that will trickle up from chapter to national.

This Chapter Evaluation Survey is an objective measurement of outcomes and is often the best and more meaningful to capturing levels of chapter success. It is used by nationals to identify the pain points of local chapters.

Instructions: Distribute the Chapter Evaluation Survey among local chapter leaders

Respondent Information

Name (Optional) _____
Board position of person taking survey _____
Time spent in this position _____
Other positions held _____
Total time on board _____
Average time spent per month in volunteer work _____



Chapter Data

Chapter name _____
Website URL _____



____ Number of members
____ Number of non-member/prospect contact records
____ Number of meetings/events per year
____ Average number of attendees per event
____ Event charge for members
____ Event charge for non-members
____ Other Revenue sources, such as: dues, products, sponsorships
____ Number of newsletters sent in last 12 months

Leadership & Board Information

- 1. I thought the number of volunteer hours I was committing to was less. True False
- 2. I work more now than when I started my volunteer position. True False
- 3. If someone was willing to take my place as volunteer I would be ready to hand over. True False
- 4. Rate your enthusiasm about current position held. 1 2 3 4 5
- 5. Rate how effective you feel you are in your volunteer role. 1 2 3 4 5

Membership Value Data

1. Prioritize the following list on what you think your members would say is the reason they become members and stay members: (1=most / 10=least)

- ___ Education
- ___ Networking
- ___ Social connections
- ___ Professional development
- ___ Professional certification
- ___ Giving back to profession/industry
- ___ Legislative action
- ___ Community service
- ___ Career advancement
- ___ Leadership development

2. What was the top reason you joined, and why?

CHAPTER PERFORMANCE MEASUREMENT TOOL

The Chapter Performance Measurement Tool helps national leadership teams garner their comprehension of a chapter's achievements, activities, and needs going forward.

Instructions: Summarize and average the results gathered from the [Chapter Evaluation Survey](#) in this Chapter Performance Measurement Tool. Plug in the raw numbers and get a full picture of the association's activity at the local level in the past 12 months. You can complete this exercise at any point and compare performance over time.

Board & General

- ___ Total number of chapters in the association
- ___ Number of board members
- ___ Average term on a board



Revenues & Sales

- ___ Revenues of dues collection
- ___ Revenues of events
- ___ Revenues of merchandise



Membership

- ___ Number of members
- ___ Number of non-members
- ___ New members added
- ___ Expired members



Email Communication

- ___ Number of surveys
- ___ Number of newsletters
- ___ Number of blog articles



Meetings

- ___ Number of meetings planned
- ___ Number of meetings held
- ___ Number of members registered
- ___ Number of members attended
- ___ Number of guests (non-members) registered
- ___ Number of guests (non-members) attended

