

# CHAPTER DEVELOPMENT

# TABLE OF CONTENTS

<b>01</b>	INTRODUCTION
<b>03</b>	CHAPTER 1: Defining Chapter Success
<b>11</b>	CHAPTER 2: Providing Association Value for Chapter Success
<b>17</b>	CHAPTER 3: The Best Way for Chapter Success - Local Autonomy within the National
<b>23</b>	CHAPTER 4: National Support for Local Chapters
<b>32</b>	CHAPTER 5: Fixing Chapter Reporting Woes
<b>38</b>	CHAPTER 6: Conclusion: Value Realized Through Autonomy and Support

## 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

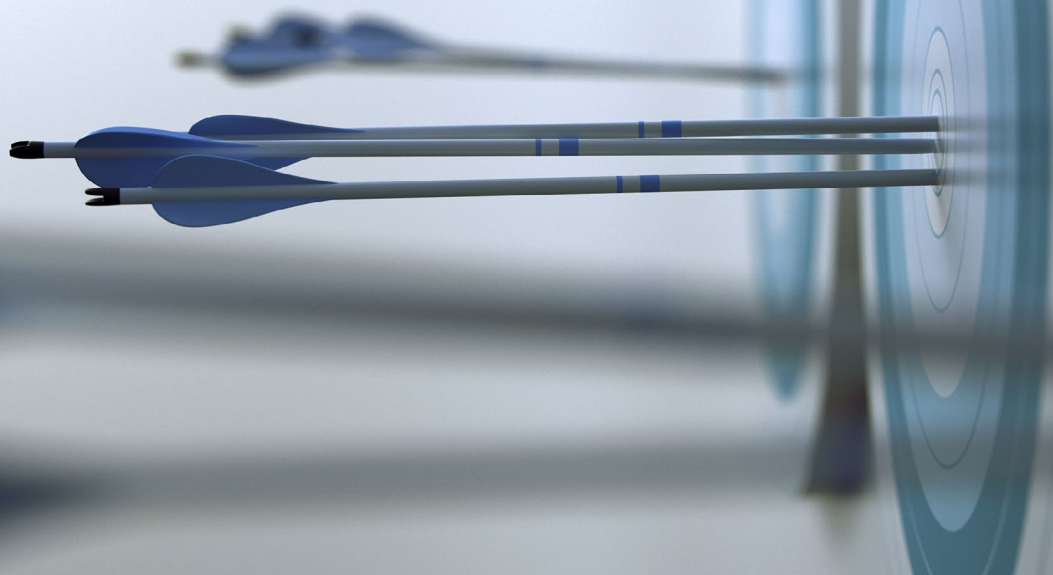
---

**T**HE 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!

[nationals@starchapter.com](mailto:nationals@starchapter.com)

A large, stylized number '2' is positioned on the left side of the page. It is composed of two overlapping shapes: a dark grey shape in the foreground and a lighter grey shape behind it, creating a sense of depth and shadow.

# 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

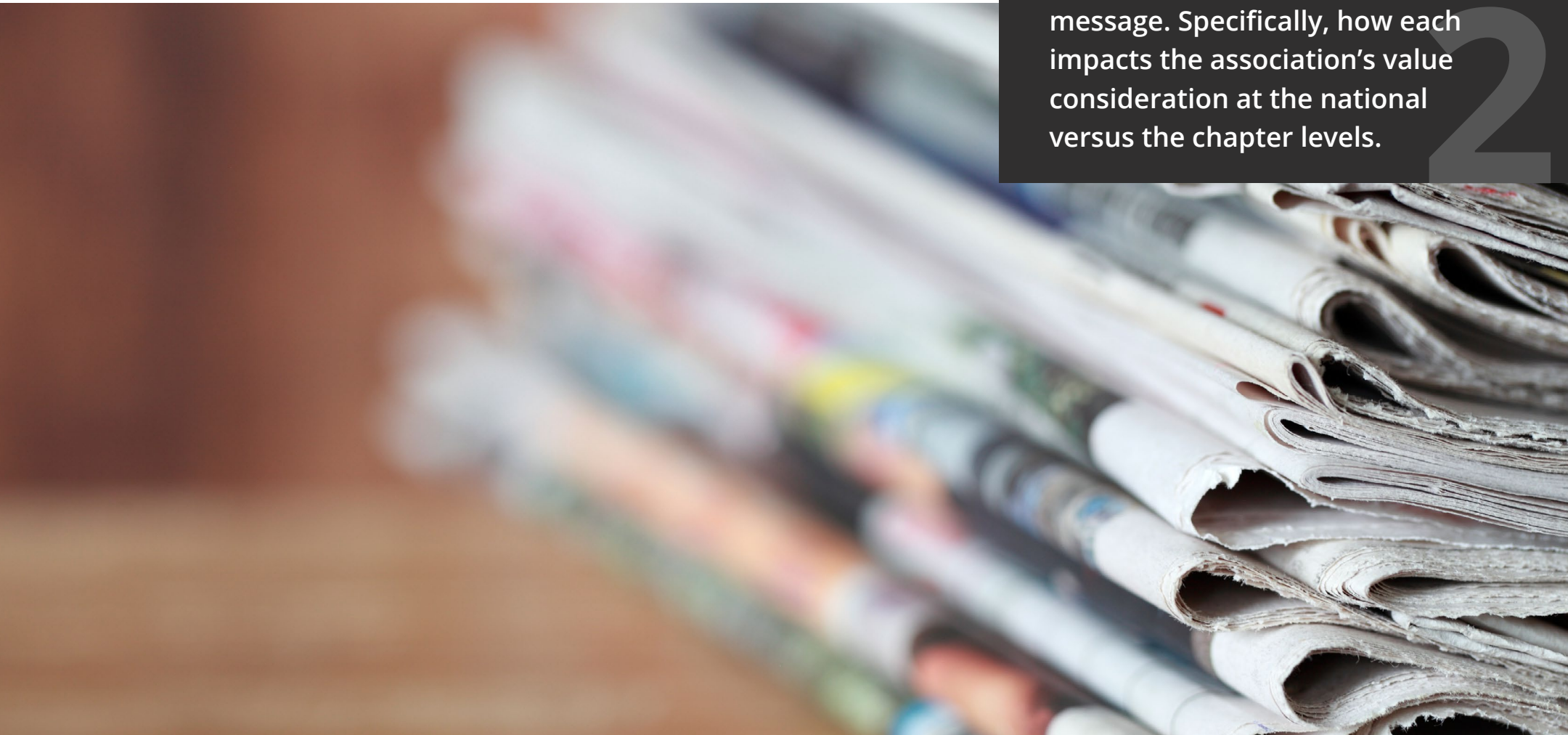
---

**S**OME 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.

# 2





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!

[nationals@starchapter.com](mailto: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

---

**M**ANAGEMENT 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.

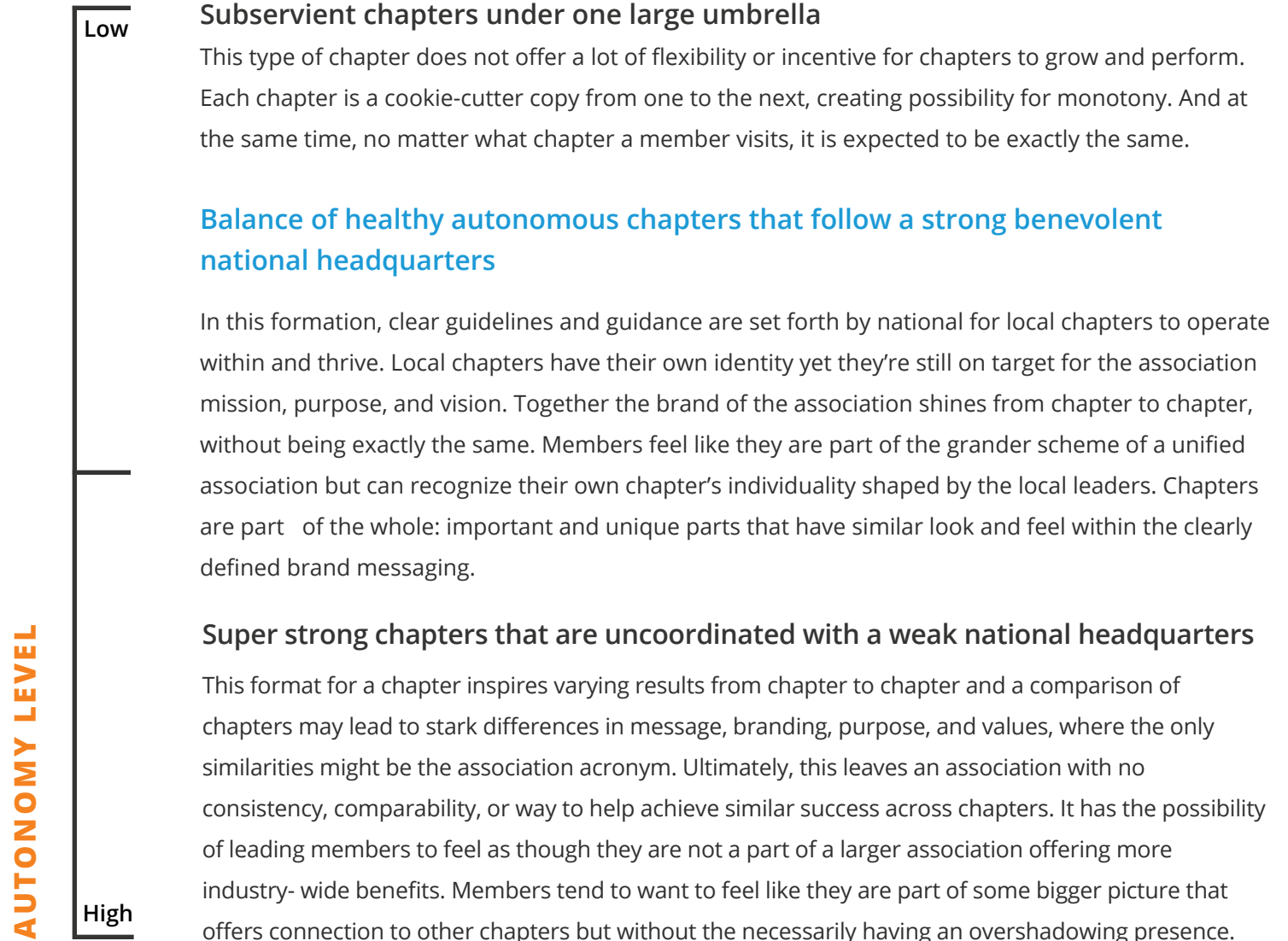
3



# 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

**L**OCAL 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

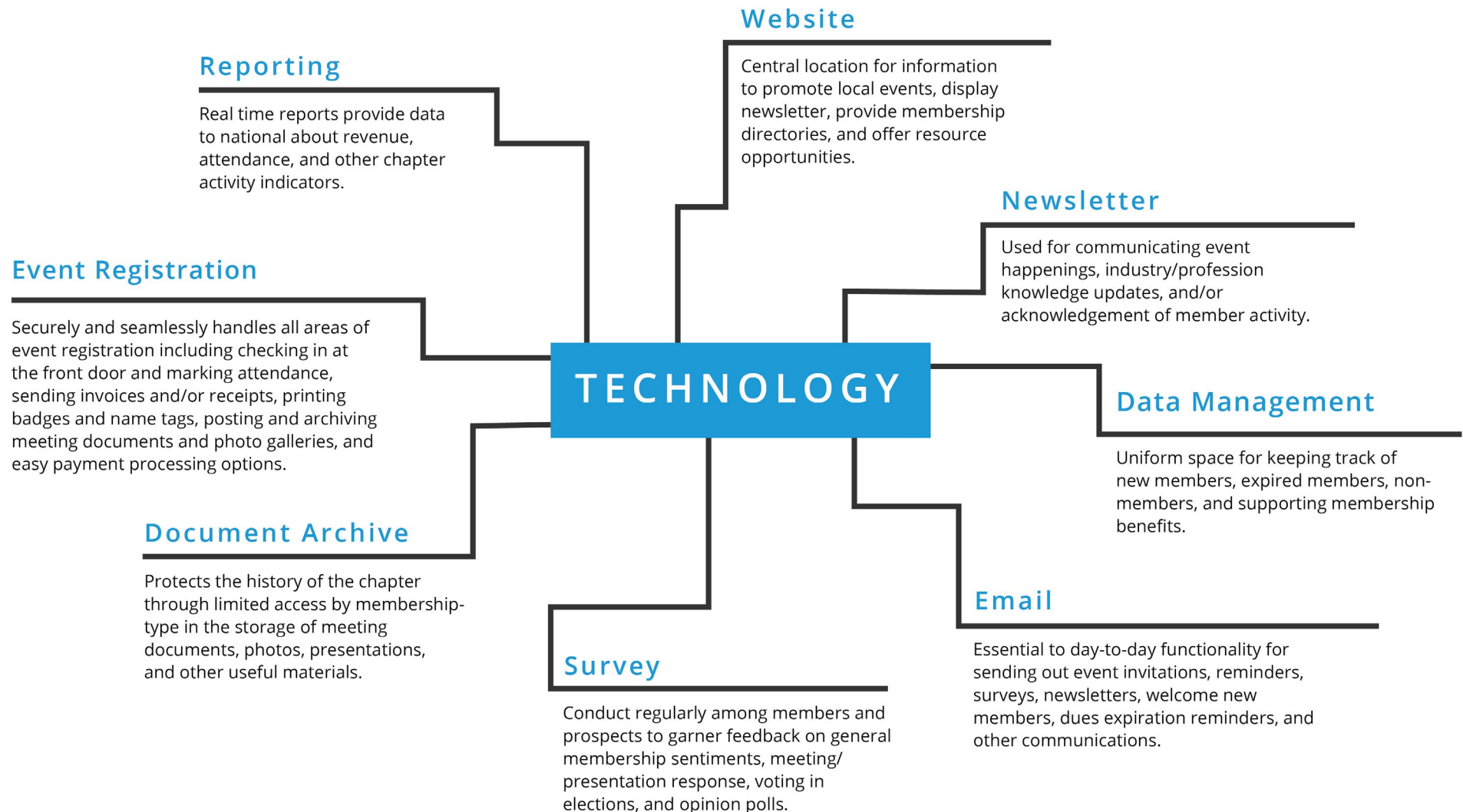


# TECHNOLOGY SERVICE AT THE LOCAL LEVEL

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

**F**OR 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

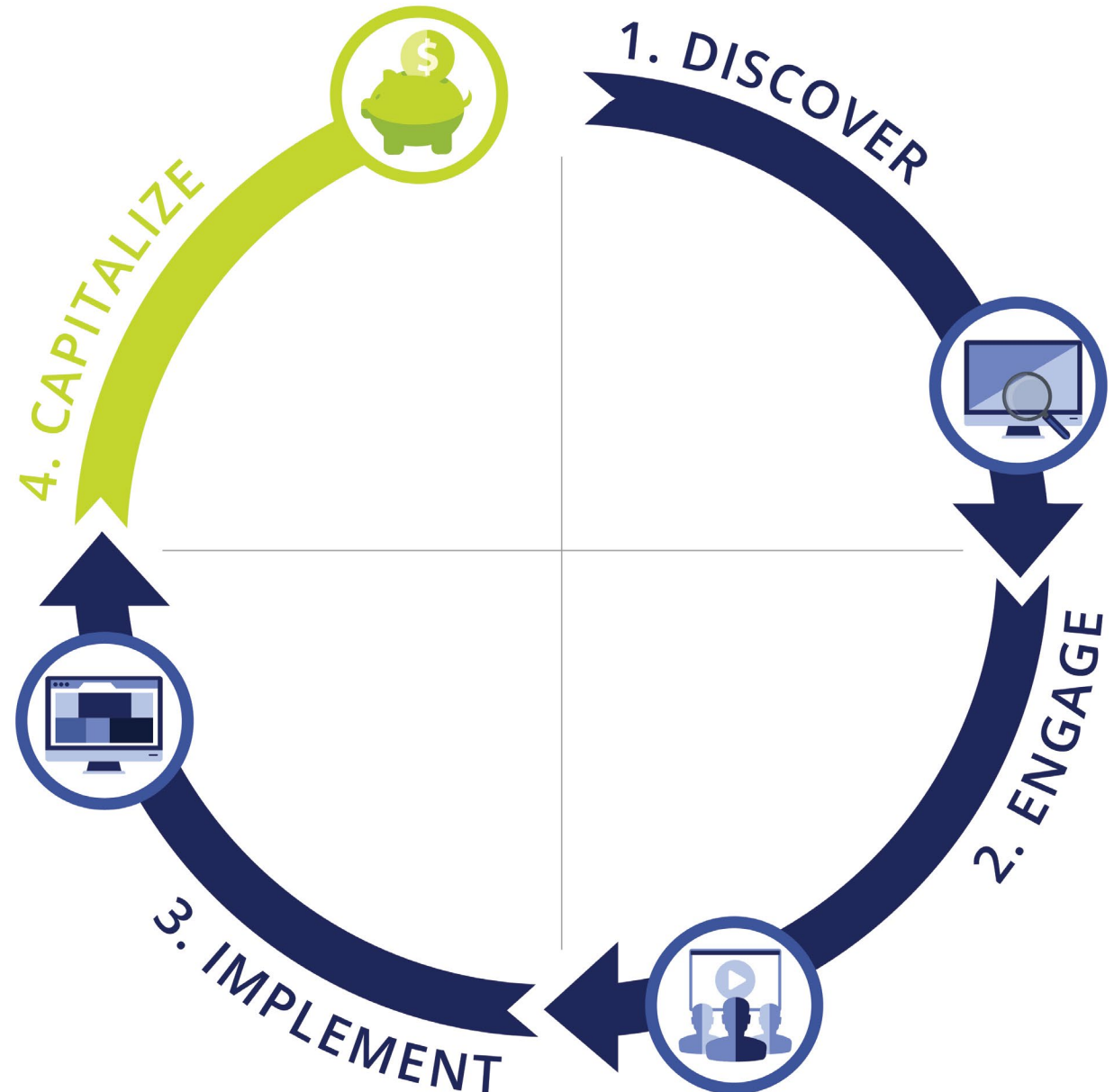
“Very capable and helpful website functionality. It supports all chapter needs. Specific questions to Tech Support are answered VERY fast and by humans, not cut-n-paste responses.”

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.

## SOURCES

---

Demers, Jason. 2015. "Define Success: A Professional's Guide to Finding Purpose and Motivation." Inc., 21 January 2015.

<http://www.inc.com/jayson-demers/define-success-a-professional-s-guide-to-finding-purpose-and-motivation.html>

Daum, Kevin. 2013. "Define Your Personal Core Values: 5 Steps." Inc., 26 April 2013.

<http://www.inc.com/kevin-daum/define-your-personal-core-values-5-steps.html>

Garnett, Laura. 2014. "How Do You Define Success?" Inc., 18 December 2014.

<http://www.inc.com/laura-garnett/how-do-you-define-success.html>

Rominiecki, Joe. 2015. "How Many Benefits Do Members Actually Care About?" Associations Now, 18 November 2015.

<http://associationsnow.com/2015/11/how-many-benefits-do-members-actually-care-about/>

Rominiecki, Joe. 2015. "Members Win When Chapters and Associations Get Along." Associations Now, 6 May 2015.

<http://associationsnow.com/2015/05/members-win-association-chapters-get-along/>

Rominiecki, Joe. 2016. "Chapter Restructuring: A Board's Most Difficult Job?" Associations Now, 1 February 2016.

<http://associationsnow.com/2016/02/chapter-restructuring-boards-difficult-job/>

Schwaar, Carolyn. 2013. "What's Your Value? Associations Strive to Define the Value of Membership." REALTOR AE magazine, 29 July 2013.

<http://www.realtor.org/articles/what-s-your-value-associations-strive-to-define-the-value-of-membership>

Smith, Ernie. 2015. "Missing: One Chief Data Officer." Associations Now, 3 November 2015.

<http://associationsnow.com/2015/11/missing-one-chief-data-officer/>

Zimmerman, Eli. 2016. "Monday Buzz: Fixing Customer Service Failures." Associations Now, 21 March 2016.

<http://associationsnow.com/2016/03/monday-buzz-fixing-customer-service-failures/>