



A healthy chapter\* program delivers valuable benefits for an association. It drives member engagement, member satisfaction, and overall member growth.

At the same time, managing a chapter program can be a tricky business. It requires sustainable chapter leadership, a supportive administrative structure, enthusiastic member involvement, and valuable member services.

So how do you know if your chapter program is truly healthy? How do you diagnose areas in which your chapter network needs repair? In this paper, you'll discover a practical approach to help you evaluate your chapter program's health and pinpoint ways to strengthen it.

### **Where the Idea Started**

As an association management company providing chapter management services to local/regional groups, many of which were chapters of national associations, we wanted to know what differentiates successful and unsuccessful chapters. By answering this question, we hoped to identify the handful of critical variables which determine a chapter's success and could serve as a developmental benchmark when creating new chapters.

With that in mind, we set out to gather information on chapters from associations across a wide spectrum. Based on conversations with 32 associations, we gleaned a clear picture of what makes a healthy chapter. From there we constructed a tool to use in evaluating and coaching chapters called the [Dashboard Indicators for Chapter Success](#), which is featured in the [Component Relations Handbook](#) (ASAE, 2012). We continually refined the dashboard based on industry benchmarking research we conducted in 2016, 2018 and 2022 along with consultations with dozens of associations. To learn more about the dashboard development, download the original research report [Bright Lights, Vibrant Components](#) and check out the [2022 Chapter Performance and Benchmarking Report](#) to read more about where chapters are headed.

### **Why a Dashboard?**

Much like a car's dashboard which monitors the status of critical functions allowing you to make quick safety/operational decisions, a Chapter Dashboard Indicator offers a visual signal of a chapter's health and warnings of problems. Dashboard Indicators is a tool to signal areas of chapter strength and weakness so you can go deeper into the underlying causes, repairing shortcomings and replicating success. Once identified, these become the areas to assess and monitor regularly – they become our core “watch” list.

*\*Note: We are using Chapter as a generic term to refer to groups that have a relationship with a national or umbrella organization. In some associations, they are referred to as affiliated groups, components, SIGS. Groups may be legally bound together as in a federation, while others are affiliated but legally separate.*

**What are the Chapter Dashboard Indicators?**

Based on industry research, we identified the four make-or-break elements for chapters: Leadership, Operational Infrastructure, Member Engagement and Member Services. Chapters that score high in these four areas are healthy, successful and growing. Specifically, they have:

- Vibrant **leadership** with a clearly defined and operational succession plan.
- Supportive **operational infrastructure** to manage risk and support leadership decision-making.
- High **member engagement**.
- Menu of **programs and services** that meet member needs.

GAUGE	INDICATOR OF A GOOD POTENTIAL FOR SUCCESS
<b>Leadership</b>	A core group of volunteers with an effective leader and leaders in the wings. Having volunteers ready to step up is as important as current leaders. Successful chapters practice term limits, have changeover in chairs and on the board, and do not recycle leaders.
<b>Operational Infrastructure</b>	An effective operational infrastructure which establishes and implements appropriate policies and procedures, provides the chapter identity, and assures continuity through leadership changes and time. Most described this as a paid staff person working at least half time ... but it was the function they performed that became the measure of success. The minimum functions are those that assure the finances, legal and communications are covered and the infrastructure to provide member services is strong. Essentially, this infrastructure minimizes the extent to which volunteer leaders wrestle with administrative functions and maximizes the time they spend on meaningful decision-making and member service.
<b>Member Engagement</b>	Members are actively engaged in the chapter by coming to meetings and events, participating on committees and serving in volunteer roles, talking to other members formally and informally, contributing to publications and communications, stepping up as presenters or facilitators, and the like. <i>Every association we talked to said they had large and small chapters that were successful ... an indication that it's not the number of members but their level of engagement.</i>
<b>Member Services</b>	Programs and services provided are well-used and address the top 1 or 2 key needs of the members. <i>Many chapter standards call for many programs and services, yet when these same associations recounted what made their chapters successful, most named three or fewer that made the difference. It wasn't the length of the list; it was the chapter that served the most important needs. While the list varied, most often noted were networking, education/training and legislative/public affairs.</i>

It is important to note that while these four elements were consistent across associations, the values varied. For example, under member programs and services, legislative/public affairs was

critical for a number of associations, yet of no consequence to others. Successful chapters effectively differentiated between what they could do and what they should do. Also, while this scale offers three lights, associations may modify. One association added a purple high-performing category, another used Role Model, High-Performing, Sustaining, Needs Improvement. And yet another named the red light Brand at Risk.

## The Story of One Association’s Two Chapters

### Chapter A Current Dashboard

<b>LEADERSHIP</b>	 Green	 Yellow	 Red
<p>Status: <i>Board positions &amp; committee chairs filled; no committees and board isn’t “deep”</i></p> <p>What’s Working: <i>Board is highly committed and responsible; has organizational history</i></p> <p>What’s Not: <i>Few new faces and struggle to recruit; Board leaders average 5+ yrs service; dealing with burn-out</i></p>			
<b>OPERATIONAL INFRASTRUCTURE</b>	 Green	 Yellow	 Red
<p>Status: <i>All volunteer; experienced treasurer; have website &amp; newsletter</i></p> <p>What’s Working: <i>Have detailed policies &amp; procedures manual; good financial reporting; access to member data; use technology to facilitate virtual meetings of the board and members</i></p> <p>What’s Not: <i>Member data is not easily accessible; doesn’t track registration by individual; doesn’t currently have in place additional communication channels like social media</i></p>			
<b>MEMBER ENGAGEMENT</b>	 Green	 Yellow	 Red
<p>Status: <i>Only some 60 members – about 10% – are in the “engaged” category</i></p> <p>What’s Working: <i>Core very loyal</i></p> <p>What’s Not: <i>Very few involved; limited ways to be involved (1 event, 2 newsletters, local subgroups) which could be a contributing factor; local groups are barely alive</i></p>			
<b>MEMBER SERVICES</b>	 Green	 Yellow	 Red
<p>Status: <i>Offer 1 conference with CEUs, newsletter 2x/yr, website, resources (primarily via calls to leadership), government relations/watchdog</i></p> <p>What’s Working: <i>Good content; critical work on the government relations end; able to provide delegates to national</i></p> <p>What’s Not: <i>Government relations fairly transparent; lack of awareness of Society; no recent needs assessment so not sure if services are targeted correctly; conference suffers from low attendance; CEU game too competitive to make a difference.</i></p>			

## Chapter B Current Dashboard

<b>LEADERSHIP</b>	 Green	 Yellow	 Red
<p>Status: <i>All board positions &amp; committee chairs filled; deep volunteer pool</i></p> <p>What's Working: <i>Board is highly committed and responsible; has organizational history; roles built around what needs to be done not traditional roles</i></p>			
<b>OPERATIONAL INFRASTRUCTURE</b>	 Green	 Yellow	 Red
<p>Status: <i>Managed by an AMC with a full suite of data management &amp; communications tech tools</i></p> <p>What's Working: <i>Have detailed policies &amp; procedures manual; good financial and activity reporting; access to member data; use technology; regular reporting</i></p>			
<b>MEMBER ENGAGEMENT</b>	 Green	 Yellow	 Red
<p>Status: <i>Most members are in the "engaged" category (attend events, support activities, volunteer)</i></p> <p>What's Working: <i>Have a broad cross-section of members who attend events on a regular basis</i></p>			
<b>MEMBER SERVICES</b>	 Green	 Yellow	 Red
<p>Status: <i>Focus on events offering a wide variety of relevant content throughout the year; provide a consistent e-letter and robust website &amp; social media presence</i></p> <p>What's Working: <i>By focusing on the most important need – events to bring members and guests together – they are able to focus energy and resources that have developed a strong brand for the organization</i></p>			

**Green** Meeting key areas (e.g., board & committee positions filled with leaders in training; strong succession plan; no board positions with indefinite or repeating terms)

**Yellow** Missing some elements, yet largely on track (e.g., key board & committee positions filled with a few volunteers willing to step up; informal succession plan; limited recycling within the board)

**Red** Missing more than ½ of key elements (e.g., openings on the board with few volunteers in the wings; see the same faces around the leadership table)

## Finding A Chapter's Setting

Identifying the settings for your association takes some thinking and examination. Measuring where your chapters are and using the tool to monitor and coach is a matter of setting up a data collection vehicle.

### To Identify Settings:

- Identify your top chapters based on retention and membership growth.
- Observe and look for common, defining variables:
  - services offered
  - operational infrastructure
  - leadership structure
  - frequency of communications
  - financial situation
  - geographic/demographics of territory
  - relevant history
  - membership engagement – how they are engaging and level of engagement
- Compare these elements to those in your weak(er) chapters and note the differences. This should help you hone in on the critical elements as well as the values for green, yellow and red settings.
- Conduct surveys to gather additional information such as member engagement from all the chapters to develop the full setting.

One association in conducting this analysis in early 2000s determined the critical member service was 10 robust monthly events. Those who couldn't muster that many events floundered. Those with more services generally didn't score higher.

### Examples of Metrics to Use - What to Survey, Collect & Analyze:

- **Member Counts – Previous, Current & Goal for both New and Renewal**  
You are assessing trends as well as targets. Consider tracking relevant key demographics to assess whether your chapter is attracting and keeping new segments of the profession and business as it evolves over time. Essentially, you need to determine if your chapter is consistently tracking well with both the size and composition of the profession and business in your area.

Retention is a key metric in the health of the organization

- **Program Participation – Participation by members and guests in all events/activities**

Are 80% of your members participating in at least 1 event/activity?

Compare averages from year to year and calculate the percentage of members who participate in at least one program or activity per year, and the average number of programs in which a member participates each year. Here you need to determine if the chapter's programs are consistently attracting sufficient numbers to justify the production effort and getting compelling participation from a high percentage of the membership (e.g., at least 80% of the members participate in at least one program or activity per year).

- **Satisfaction** – Use metrics like [Net Promoter Score](#) (customer loyalty metric used by corporations, nonprofits, governmental agencies and associations) or member [satisfaction scores](#).
- **Leadership – *Percentage of positions consistently filled & makeup of the volunteer***  
You need to assess more than just positions filled. Look at the percentage of positions filled by "retreads" (repeat board members) vs new volunteers. Look at how deep your pool of volunteers is at the committee level. Look at how many/which positions fulfill meaningful roles and ask volunteers at the end of their term if they can say, "I did something worth doing."
- **Income** – Review the balance sheet and net income at least quarterly. Ideally, set up the income statement to present each program as an independent business unit and allocate overhead accordingly.

What are members saying about your programs & your chapter?

### What's Your Chapter's Setting?

Use the **Chapter Worksheet** and the **Guiding Questions** on the next three pages to get your chapter readings. While this can be used independently, it is equally effective as a comprehensive tool for an association's chapter program. We recommend a few additional steps that begin with defining the gauges as they relate to the association's mission, identifying the metrics to track to measure performance, setting the dashboard values and then conducting a chapter assessment to establish initial readings. For more information on an association-wide approach, contact Mariner Management.

Association Management, Volunteer Development, Consulting  
[www.MarinerManagement.com](http://www.MarinerManagement.com)  
 301.725.2508



## What's Your Chapter's Setting? A Chapter Worksheet

Begin by noting your lead association's statistics. Then, fill in the numbers as best able for the chapter. Next, rate your chapter in the four key areas by checking the appropriate circle and note what's working and what's not working in each area.

### National Statistics

No. of Members: \_\_\_\_\_  Growing  Maintaining  Dropping

Annual Average Retention Rate: \_\_\_\_\_  Growing  Maintaining  Dropping

Primary role chapters serve for your association: \_\_\_\_\_

\_\_\_\_\_

### Chapter Statistics for \_\_\_\_\_

No. of Members: \_\_\_\_\_  Growing  Maintaining  Dropping

Annual Average Retention Rate: \_\_\_\_\_  Growing  Maintaining  Dropping

Primary services members seek from chapters\*: \_\_\_\_\_

\_\_\_\_\_

*\*This is based on what members say are the most important one or two (max) services Chapters offer that in turn drive the value received as a Chapter member.*

#### LEADERSHIP

Green  Yellow  Red

What's Working: \_\_\_\_\_

What's Not: \_\_\_\_\_

#### OPERATIONAL INFRASTRUCTURE

Green  Yellow  Red

What's Working: \_\_\_\_\_

What's Not: \_\_\_\_\_

#### MEMBER ENGAGEMENT

Green  Yellow  Red

What's Working: \_\_\_\_\_

What's Not: \_\_\_\_\_

#### MEMBER SERVICES

Green  Yellow  Red

What's Working: \_\_\_\_\_

What's Not: \_\_\_\_\_

## Dashboard Key

**Green** Meeting key areas (e.g., board & committee positions filled with leaders in training; strong succession plan; no board positions with indefinite or repeating terms)

**Yellow** Missing some elements, yet largely on track (e.g., key board & committee positions filled with a few volunteers willing to step up; informal succession plan; limited recycling within the board)

**Red** Missing more than ½ of key elements (e.g., openings on the board with few volunteers in the wings; see the same faces around the leadership table)

## Guiding Questions to Determine Green, Yellow & Red Rating

### Leadership

*Best Practice: A core group of volunteers with an identifiable leader and leaders in the wings*

- 1) Which statement best describes the current board or most recent boards?  
 All key positions filled    Most key positions filled    Few/no key positions filled
- 2) Which statement best describes the makeup of the current board?  
 50% or more are new or people serving their 1<sup>st</sup> or 2<sup>nd</sup> term  
 50% or more have been on the board for more than 2 terms  
 75% or more have been on the board for more than 2 terms
- 3) Which statement best describes the current leadership succession plan?  
 Catch-as-catch-can    Written, limited implementation    Fully functioning
- 4) Which statement best describes the current volunteer onboarding plan?  
 Don't have    Informal    Written, limited implementation    Fully functioning

### Operational Infrastructure

*Best Practice: Infrastructure provides appropriate policies and procedures; tracks and reports key metrics; assures continuity through leadership changes and time; and assures chapter identity.*

- 1) Prepare financial statements:  Monthly    Quarterly    Bi-annually or less
- 2) Have:  annual written plan    approved budget
- 3) Percentage of annual operating budget held in reserves:  50%+    20-49%    <20%
- 4) Data Management  
Operate & maintain membership database:  Yes    No  
Generate regular reports on counts, retention, new members from the system:  Yes    No  
Generate regular reports from the system:  Yes    No  
Track registrations by individual:  Yes    No  
Track activity participation by individual:  Yes    No  
Track volunteering by individual:  Yes    No

- 5) Which of the following up-to-date policies & procedures does your chapter have?
- Chapter operations policy
  - Board policy and procedures
  - Elections procedures (process, candidate qualifications, ballot development, balloting)
  - Officer, board & volunteer job descriptions (basic functions, duties, responsibilities & authority)
  - Financial procedures/policies (including collections, sponsorship, investments and reserves)
  - Records Retention policy
  - Advertising policy
  - Event policies and procedures (planning, pricing policy, registration, speaker selection)
  - Advocacy policy
  - Members list usage policy and procedure
  - Volunteer policies (standard of conduct, confidentiality)
  - Communications (procedures re website, e-letter, social media)
- 6) Which if any statistics measuring member engagement are collected for/by the chapter?
- Open/click-thru rates on e-letter/email
  - Website visits
  - Volunteer activity
  - Newsletter readership (e.g., reader survey)
  - Individual event attendance
  - None of the above
  - Other: \_\_\_\_\_
- 7) Administrative Function:  Paid staff or equiv  All volunteer
- 8) Operations:  Has written policies & procedures for all key programs and services
- Somewhat current policies and procedures for all most key programs and services
  - No written policies & procedures or does not currently follow any policies & procedures
- 9) Communications (Consider outbound communications but not static channels like website):
- Monthly or more
  - Only in conjunction with events
  - Rarely
- 10) How often do you update your website?
- Monthly or more
  - Based on events
  - Rarely
  - No current website

### **Member Engagement**

*Best Practice: High percentage of members actively engaged in the chapter by coming to meetings & events, talking to other members formally and informally, stepping up as presenters or facilitators, participating on committees and the board*

- 1) Is membership retention % relative to the national average?  Higher  Same  Below
- 2) Which of the following statements describes the engagement of members in the chapter?
- 75% Participate in or attend events regularly (defined as at least quarterly)
  - 50% Participate in or attend events regularly
  - 25% Participate in or attend events regularly

3) Which percentage of members have attended or participated in at least one event in the calendar year?

- 80%    50-79%    25-49%    less than 24%

4) Which of the following statements describes member engagement of members in the chapter as volunteers and supporters?

- It's a struggle to get people to volunteer by donating time or resources  
 We generally are covered  
 We have more volunteers/donations than we need

5) What percentage of your membership is engaged in volunteer activities by serving on the board, committees, councils, work groups, and ad hoc?

6) What is your NPS?

7) What is your member satisfaction score?

8) What percentage of Chapter members also hold national membership?

9) What percentage of Chapter members are new professionals?

### **Member Services**

*Best Practice: Success isn't in the length of the list, but that the chapter serves the most important need(s) as identified by the members.*

1) What do members say is the chapter's primary program/service?

2) How frequently does the chapter deliver on that program/service?

3) What additional local member programs/services are offered?

4) Are event or program/service evaluations regularly conducted?

5) What is the average attendance for:

\_\_\_ Educational events

\_\_\_ Social events

\_\_\_ Community service activities