

BRIGHT LIGHTS, VIBRANT COMPONENTS

Use dashboard indicators to check the health of your chapters.

By Peggy Hoffman

Twenty-three of the 25 affiliate groups of the Retailer's Bakery Association, Laurel, Maryland, measured up to RBA's performance standards within one year of their launch as part of a new initiative to build a stronger association network. Time to celebrate? After all that's a 92 percent pass rate. However, considering that fewer than half of the affiliates could claim a full board with fresh faces, most had less than a 15 percent penetration of their respective markets, only a handful had regularly scheduled events or newsletters, and membership numbers remained stagnant, we didn't think so. Bottom line: These state and regional affiliates could meet the standards and still fail.

This scenario unfolded in 2000, when I headed membership and affiliate relations at RBA. At that time, RBA's components, which were independent state and regional groups, forged a joint-membership agreement with the national association. As part of this agreement, RBA would market a national-local membership, collect the dues, and rebate a significant portion back to the local groups. The Alliance Congress, RBA's governing board for its affiliates, along with its staff, set the local association standards required to receive the dues rebate and actively participate in the congress and the program. The standards failed—not because the local groups couldn't meet them, but because meeting the particular standards didn't improve the performance of the chapters in the areas of governance, member services, or market penetration.

We needed a new approach that would focus on the make-or-break items, allowing us to intervene in the areas where we would have the greatest impact. We also knew we needed a tool that allowed for the individuality of each chapter.

It was only after leaving RBA and opening an association management company that I had the resources and opportunity to explore the issues further and apply the findings to a wider group of organizations. Taking a lead from the business world, my partner and I looked at the value of the Dashboard Indicator. We first saw the concept discussed in an ASAE listserver dialogue related to the balanced scorecard. Further exploration led us to myriad dashboard tools in action. We studied examples from colleges, health care facilities, corporations, and not-for-profit organizations—specifically Habitat for Humanity. We even found the Dashboard for Sustainability, which is used in analysis and planning for international development projects. By tailoring the dashboard concept to components, could we identify the handful of critical variables that determined a chapter's success and set up a system for measuring those? We decided that it was an idea worth trying.

After conducting in-depth surveys of 32 associations with components and studying information available through ASAE, the answer was yes. (See sidebar, "Survey Methodology" for details.) We crafted a prototype dashboard and tested the concept via a chapter assessment for the American Mental Health Counselors Association (AMHCA), based in Alexandria, Virginia. Like a car's dashboard, this tool offers a visual signal of a chapter's health and warnings of problems. By paying attention to key factors, we can identify and assess performance measures, monitor them regularly, and act promptly when problem warnings are indicated.

For example, at AMHCA the information gained from its dashboard indicators showed that one of the weakest areas for its chapters was administrative support. This knowledge prompted the board to shift money from its legislative grants to administrative grants that could help chapters build the necessary support. As with AMHCA, associations can rarely fund or address all concerns. Knowing which items will make the biggest difference is a valuable tool in making better decisions. At RBA, knowing what areas might benefit the most from more staff attention allowed us to help focus that staff energy in the right places. The flexibility of the dashboard indicator concept means that many associations can benefit from its use as a tool to set priorities for staff time and dollars.

Analyzing the results of our survey, we uncovered four elements that correlate to chapter success: leadership, administrative structure, membership involvement, and member services. These then became our dashboard indicators.

Across the 32 associations that we surveyed, we found that when the indicators were strong in these four areas, a chapter had strong membership numbers, successful events, and a solid financial standing. Additionally, the national offices of the respective organizations found that the chapters were rich with ideas, produced effective national leaders, helped in building and retaining membership, and generated involvement in national programs.

Interestingly, no correlation existed between chapter success and the national organization's annual operating budget, staff size, level of support, or chapter standards.

FOUR STRONG INDICATORS

Once we knew the four success factors, we identified the full, safe, and low, or warning, levels. We used our research to identify each level's basic characteristics. For example, all strong chapters had a diverse board that drew in and cultivated new volunteers to take on leadership roles. They participated in leadership training. And the boards avoided recycling board members. Conversely, a chapter with an aging board, vacant seats, and leaders on their second or third shifts indicated weak leadership and a low dashboard light. Our research provides associations with two critical pieces of data: 1) the areas to concentrate on when assessing chapters and 2) the characteristics of a strong light. From this point, each association must set its unique measurements, such as the definition of diverse in referring to leadership or optimum size for its board. We found that while values vary among associations, the characteristics of a strong indicator do not. The following examples describe associations that demonstrate the full level of each dashboard indicator:

Sustainable leadership. When the incoming volunteer president of the Chesapeake Chapter of the Risk Management Association, Laurel, Maryland, lost her job in a bank merger, the board developed a contingency plan in case her job search took her out of the area and she was unable to fill her leadership role. When that eventually happened, this board was ready to move quickly to select another leader. And because it had invested in leadership development by regularly sending additional officers to the national association's leadership training conference, by holding an annual strategic planning session, and by having an annual plan in place, the first vice president was

able to step up to the plate and assume the top position, validating the chapter's strong leadership gauge.

Supportive administrative structure. Administrative solutions come in many sizes and shapes. For example, the Professional Convention Management Association, Chicago, built a solution that supports event management at the local level so that its chapters consistently produce effective events. Chapters have access to an online meeting package provided through a national licensing agreement negotiated by PCMA. This tool helps chapters automate key aspects of meeting planning and marketing. Added to that, the PCMA Chapter Professional Development Series aids chapters in selecting—and paying for—speakers.

Enthusiastic member involvement. Members of the Massachusetts Society of Otolaryngology—Head and Neck Surgery (MSO), Waltham, actively participate in a wide range of activities from legislative issues to grassroots public relations. Although not directly affected by rising professional liability insurance rates, this dedicated group mustered a strong showing at last year's Rally for Reform at the Massachusetts State House in support of fellow physicians. Advertising, special member mailings, and staff time to coordinate logistics were part of the statewide effort. The society credits the collective efforts of its members for its success in empowering its agenda and moving it forward. The national society agrees and recently awarded the Massachusetts chapter its Model Society honor for the second time in four years.

Worthwhile member services. The chapter administrator of the Massachusetts Mental Health Counselors Association, Framingham, told us that one of the biggest challenges to the organization is to remain relevant to its members. Understanding and acting on this premise is one reason that MMHCA has a strong member service gauge. After achieving a big legislative win in 1996 on a galvanizing issue for members (third-party reimbursement), the association modified its agenda to focus on continuing education and services related to licensing.

DASHBOARD IMPLEMENTATION

The first step in adopting a dashboard approach is to define the indicator values that fit your association. The values are as individual as the association. Take, for example, member services. At RBA, a local legislative agenda was not a critical member need, while such an agenda is at the top of the benefit list for American Physical Therapy Association chapter members.

Even within chapters you will find varying needs—and therefore varying descriptions of what makes a strong dashboard light. The Risk Management Association, Wallingford, Pennsylvania, for instance, has chapters for which a community bank or a women-in-banking affinity group is a critical program, while for others affinity groups are not even a part of member services.

For the member services gauge, the light is strong when your members are satisfied, not when you are satisfied. To evaluate this gauge, conduct member satisfaction surveys and focus groups, incorporating your findings with data from other measures such as the results of delinquent member reports and other attendance counts.

Once you've identified the values that are relevant to your organization, you are ready to set up your dashboard. Follow these five basic steps:

1. Revisit the mission and vision of the national organization and the chapter.
2. Define your gauges as they relate to the mission. Assign one team to work on each of the four gauges. When selecting teams, engage chapter and national leaders, staff, and members.
3. Establish methods to measure success. For example, vibrant leadership can be measured in terms of the number of new volunteers signing on for leadership positions and the existence of an active leadership succession plan.
4. Conduct a chapter assessment to establish initial dashboard readings. Measure each chapter using the methods described earlier, assigning a full, safe, or low/warning light in each category. Some components will have all lights registering full; others may have all or most lights registering low; but most will show a mixture of readings.
5. Assign a staff member to regularly monitor the gauges. At RBA, for example, a task force from the governing board charted the affiliates' performance in key areas. We then used a Microsoft Excel spreadsheet, along with monthly reports, to keep the executive vice president advised of chapter performance. Some areas, such as communication, required more frequent monitoring, while items such as board elections could be monitored on an annual basis.

Once in place, use this tool as you do your car's instrument panel. Watch for warnings and identify areas for mentoring an ailing or emerging chapter. Let it guide your planning. If you find, as we did in our prototype chapter assessment for the American Mental Health Counselors Association, that many of your chapters are weak in one of the gauges, you may choose to focus staff and resources on that area. Read the "Close-Ups" throughout this article to see the kinds of results that can be achieved by identifying dashboard indicators of your chapter's effectiveness and monitoring them on an ongoing basis. You can also use this tool to help prepare a list of components that require follow up.

The critical difference, then, between the chapter dashboard tool and the standard chapter-evaluation program is that the latter often focuses on structure and activity—and there may be some benefit in evaluating those criteria. However, when you are looking to produce leaders, attract members, and create relevant programs, the standard evaluation tools don't measure the elements that will achieve those goals. The dashboard does. If framed to measure the identified indicators of chapter success—leadership, administrative structure, member involvement, and member services—the dashboard-indicator approach is an effective tool for monitoring and strengthening the performance of your association's chapters.

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SIDE BAR I***Ensuring Continuity in Leadership***

Recognizing that leadership will always be a priority for its future, the Medical Group Management Association, Englewood, Colorado, has made leadership a component of its dashboard indicators and created an extensive leadership development program. Beginning with the vision that the perfect leader is knowledgeable about the association, understands his or her role and responsibilities, and has good communication and decision-making skills, MGMA staff and a volunteer task force identified the related competencies. With input from special-interest groups, sections, committees, and state affiliates, the task force sorted the competencies into six domains: association and leadership roles; relationship management; communication; meeting preparation; organization, management, and evaluation; and decision making and problem solving. With the help of an outside educational consultant, MGMA translated these into a curriculum that is delivered to volunteer leaders—as well as to interested members not yet on the leadership track. Training modules are delivered online, at regularly scheduled educational conferences, and through leadership and governance sessions at its national conference. “Early on, we made a philosophical decision that this would be a member benefit,” explains Adrienne Bien, CAE, vice president of MGMA’s Learning and Networking Center. After all, says Bien, “The skills that members learn by attending our leadership training program are transferable.... Our vision is that MGMA [members] will have already gone through our leadership training before they even accept that first volunteer position. This means that they will hit the ground running, be more effective, and enjoy the volunteer experience more.”

SIDE BAR II***Survey Methodology***

To gather information relating to characteristics of effective association chapters, Mariner Management & Marketing, LLC, Laurel, Maryland, conducted in-depth phone surveys with 32 associations. Professional and trade associations, federations, conglomerates, and independent organizations were represented. The associations had annual operating budgets ranging from less than \$1 million up to \$15 million and represented both small- and large-staff organizations. The list of associations surveyed was culled from ASAE staff and member recommendations of associations that were doing the best job in chapter relations or that were trying new ideas. We also reviewed existing survey and industry information, including *Policies & Procedures in Association Management: A Benchmarking Guide* (2001, ASAE).

Our phone survey focused on the following questions:

- What is the association doing for its components?
- How is the association measuring the success of its efforts?
- What is the return on investment in new initiatives?
- What are the defining characteristics of the organization’s successful groups?

For a copy of the complete survey, go to www.marinermanagement.com, and click on “Resource Center.”

SIDE BAR III***Conquering Administrative Challenges***

Taking a lesson from its profession, the American College of Emergency Physicians, Irving, Texas, applied a combination of intervention and education to help chapters find a cure for their administrative challenges. After ACEP learned that its successful chapters were the ones with the right staffing, the organization offered 13 of its non-staffed chapters a two-year administrative package to demonstrate the value of strong support, get chapters hooked on the concept, and coach them in building their own staff. “We needed strength in these chapters for building advocacy efforts, coalitions, and programming,” says Gloria Thompson, CAE, manager, chapter services. The two-year program provided full administrative support and motivated chapters to establish their own funding structures for continued administrative help. For example, members of the board encouraged chapters to raise dues—7 of the 13 did—and ACEP provided resources and help in interviewing and selecting staff for chapters that indicated they could use such assistance.

Of the original 13 chapters, seven went on to hire staff, and others are moving toward that goal. The seven staffed chapters now have stronger member numbers, increased activity, and are participating in key leadership meetings.

SIDE BAR IV***Pumping Up Member Involvement***

In its dashboard analysis, the Association of Women in Communications, Severna Park, Maryland, recognized that the traditional AWC chapter did not have involvement options that fit the needs of its members. As an alternative, the association launched its Alliance Model, which, Executive Director Pat Troy, CAE, explains, “recognizes that women want the interaction, education, and opportunities, but they don’t want a lot of strain and pain.” AWC’s Alliance Model makes it easier for members to be involved by stripping away much of the administrative and nonessential details, such as formatting short and focused board meetings with much of the day-to-day communication handled via e-mail. Creating small, well-defined roles that are time-specific, such as working on a task force for three months, has built member involvement. “We stress to our alliance leadership teams the importance of attempting events and programs that are meaningful and involve people in small ways,” Troy explains. “And always to build in a social component, since friendships are a large part of why members join and stay.”

Troy says the concept has proven effective. For example, two failing chapters have reemerged in an alliance that appears strong and healthy.

SIDE BAR V***Partnering to Provide Member Services***

Confirming through its dashboard exercise that the volunteer leaders of the American College of Sports Medicine, Indianapolis, have limited time and resources, ACSM has

made a conscious effort to help chapters with programming, an important member service, says Heather Turner, membership and chapter services manager.

ACSM employs two models for providing programming funding to chapters through national partnerships. One partner provides an annual \$1,000 unrestricted educational grant to each chapter to be used at the chapters' discretion to support programming or organizational needs. The partner also funds travel and honoraria for a speaker to present at the chapters' annual meetings.

A second national partner provides an educational grant for ACSM to develop and distribute a ready-to-present PowerPoint workshop series to its chapters. An unrestricted \$3,000 companion grant goes to chapters that include one of these workshops in their annual meetings, thus reaching members at the grassroots level. These efforts to improve member benefits through valuable educational content have been greatly enhanced due to the involvement of an ACSM chapter representative in the partnership negotiations.