

Mariner Management & Marketing LLC
Chapter Performance Metrics - Sample *

	<u>Needs Improvement</u>	<u>Sustaining</u>	<u>High Performing</u>	Optimum Reporting Method
MEMBER ENGAGEMENT & SERVICES				
Satisfaction/Net Promoter Score	< 50%	51% - 79%	>= 80%	Member Survey **
Value Gap (Importance vs Value)	> 40%	11% - 39%	<= 10%	Member Survey
Participation	< 60%	61%-89%	>= 90%	HQ Database
Membership Penetration (Dual Mbr)	< 50%	51% - 79%	>= 80%	HQ Database
LEADERSHIP				
Succession***	Officer/Leader > 5yrs; Director >10yrs	Officer/Leader 3-5yrs; Director 7-10yrs	Officer/Leader <= 2yrs; Director <= 6yrs	HQ Database
Volunteer Pool (% Members Volunteering per Year)	< 10%	10%-20%	> 20%	HQ Database
Planning	Does not plan	Develops general plan, but lacks details	Develops detailed operational plan which identifies resource requirements and interim benchmarks	Self-Reported
COMMUNICATIONS				
Web Presence	Stale Website; Little or No Social Media	Inconsistent Updating; One SM Presence	Consistently Fresh Website; Multiple SM	HQ Database
Outreach (outbound)	< Quarterly	Between Monthly and Quarterly	Consistently Monthly or More Frequently	HQ Database
Active membership conversations (% mbr participation)	< 5%	6% - 20%	> 20%	HQ Database
ORGANIZATION ****				
Legal Compliance	Hasn't met or cited by jurisdiction for non-compliance	Most requirements met	Consistently meets all requirements	Self-Reported
Finance				
- Generates standard financial reports	< Quarterly	Between Monthly and Quarterly	Monthly	Self-Reported
- Reserves as % of Annual Expenses	<10%	10-49%	>=50%	Self-Reported
Brand Compliance	Uses incorrect chapter name and logo. Frequently posts IP without appropriate attribution.	Uses incorrect chapter name or logo. Occasionally posts IP without appropriate attribution.	Consistently complies with branding and intellectual property standards.	Staff Audit
Data Management	Uses fragmented data tools (e.g. multiple spreadsheets) rarely synchronized with HQ data.	Utilizes coherent data system, but inconsistently synchronized with HQ data.	Fully participates in HQ database system	HQ Database

* Values will vary across associations and need to be adjusted following baseline policy and performance assessment.

** Option to conduct this member survey quarterly, semi-annually or annually

*** The number of years in each category is based on an average term of 1 yr for officers & 3 years for board member

**** Recommend a periodic audit