



NIGP **CHAPTER ACADEMY**

**2023 | Virtual
Data & Decisions**



- ✓ **Reminder alert (You have supports!)**
- ✓ **Data & Decisions**
- ✓ **A Dashboard Story**



**Where you able to join
us in St. Louis?**



**What's a decision that
your board wants to think
differently about?**

A vintage black rotary telephone is positioned on a rustic wooden surface. The phone has a classic design with a circular dial in the center, a coiled handset cord on the left, and a separate base. The background is a solid dark blue-grey. The text "Who you gonna call?" is superimposed in white over the center of the phone's dial.

Who you gonna call?

Chapter Ambassadors

Connecting NIGP and Each Chapter!

- Share the latest NIGP member benefits, educational opportunities, resources, and tools.
- Hear what chapter members and leaders need from the Institute and address questions

How?

- Annual Virtual Visits & In-Person Visit every other year
- Meeting with Chapter Board
- NIGP Presentations and/or hosting an NIGP Booth
- Connect Anytime with Questions

✓ Learn more: <https://www.nigp.org/chapters/chapter-ambassador-visits>

Chapter Ambassador Visits



NIGP Chapter Ambassador Visits

These meetings between chapters and their NIGP Ambassadors provide chapter members with an opportunity to learn about the latest NIGP member benefits, educational opportunities, resources, and tools. The Ambassador meeting also allows chapter members and leaders to ask questions and discuss the support they need from the Institute.

During Ambassador visits, chapter leaders can share success stories, governance issues, and more. Once the visit is confirmed with the NIGP Chapter Relations Manager, we encourage you to reach out to the Ambassador to discuss the visit as it pertains to the topic of presentation and time with your chapter. When scheduling, please allow ample time for the Ambassador to present to your membership and meet with your Board. We request scheduling a minimum of one hour for an Ambassador visit.

NIGP Content Presentations

Choose a specific topic presentation to bring to your Chapter! Request an NIGP staff member to speak to your chapter about Pathways, NIGP-CPP, Workforce Development, and more. Presentations from members of the NIGP Business Council cover a wide-range of topics such as Disaster Recovery, Supplier Diversity and COVID's Impact on Manufacturing, to name a few. Click on the box to the right see full a full list of presentation topics and descriptions from NIGP Business Council members.

Once you have decided on they type of engagement you want, please fill out the "Request a Visit" and you will be contacted about further coordination.

Request a Visit from NIGP

Chapters can request an in-person or virtual visit. Once we receive your request, the visit will be coordinated by a member of NIGP staff.

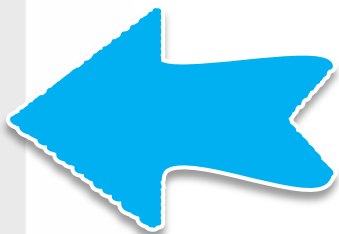
REQUEST A VISIT



Content Presentations

for Chapter Visits

VIEW TOPICS AND
DESCRIPTIONS



NIGP Staff: Your Resource

- Jennifer Steffan jsteffan@nigp.org – Chapter Relations
- Karen Robinson krobinson@nigp.org – Hosting an NIGP Course
- Chanda Taylor Carpenter ccarpenter@nigp.org – NIGP Education/Scholarships
- Diane Daly ddaly@nigp.org – NIGP-CPP Certification
- Ronni Levine rlevine@nigp.org – NIGP Webhosting
- Customer Service customercare@nigp.org

✓ Learn more: <https://www.nigp.org/contact-us>

Chapter Online Resource Library

- Annual Reporting Forms
- Governance – bylaws, SOPS
- Financial Management – internal check list, record retention
- Membership – brochures, scholarships, recognition engagement
- Marketing
- Events and Conferences – sponsors, RTS, pro-d events
- Legal, Tax and Insurance

**Share Your
Chapter
Documents!**

✓ Learn more: <https://www.nigp.org/chapters/chapter-ambassador-visits>

Chapter Subject Matter Experts

Leaders with designated expertise in the area you need support!

Support those struggling in specific areas of Association Management:

- Governance
- Bylaws, Policy and SOP's
- Finance
- Legal
- Operations
- Volunteerism
- Event Planning
- Membership

Work with you to develop goals and measurements for improvement while providing recommendations on outcomes and timelines.



Watch for more details coming soon!

Chapter Dashboard

Your team tool to set goals, measure success & chart progress

HOME

SAMPLE DASHBOARD

MY ACCOUNT

Welcome Peggy Hoffman

Home

My Applications

All (0)

Incomplete (1)

My Judging Assignments

My Profile

Log Out

Your Chapter Dashboard

What makes a healthy chapter? Association industry research on chapters identified 4 make-or-break elements for success. Chapters that score high in these four areas are healthy, successful and growing

- Vibrant **leadership** with a clearly defined and operational succession
- Supportive **operations** to manage risk and support leadership decisions
- High **member involvement**
- Actively used **Member services**

It is important to note that while these four elements were consistent across all chapters, some chapters may find a focus on virtual events allows a geographic trade show is a must-have event for another. Successful chapters effectively balance these elements and should do.

Finding Your Chapter's Setting

On these next couple of screens, you will work to determine your chapter's current setting by responding to guiding questions. To help you, you will be asked to consider what's working or not working in each of the four areas.

We will use the Chapter Academy sessions to help guide you in completing the Dashboard as well as determining actions you can take to improve or maintain settings.

- Collaborate! it's a team project!
- NIGP handles calculation
- Change, update throughout the year
- *Call Jennifer Steffen or your CA*

NIGP

Log in to <https://nigp.secure-platform.com:443/chapters>

A photograph of a forest path that splits into two directions. The path is covered in fallen yellow and brown leaves, and the surrounding trees are lush green. The scene is set in a dense forest with many trees and a thick canopy. The path is made of dirt and gravel, and the leaves are scattered across it. The overall atmosphere is serene and natural.

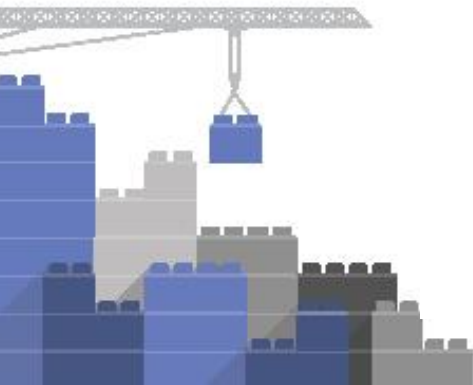
Data is a tool for Decisionmaking



**What's your question
about data?**

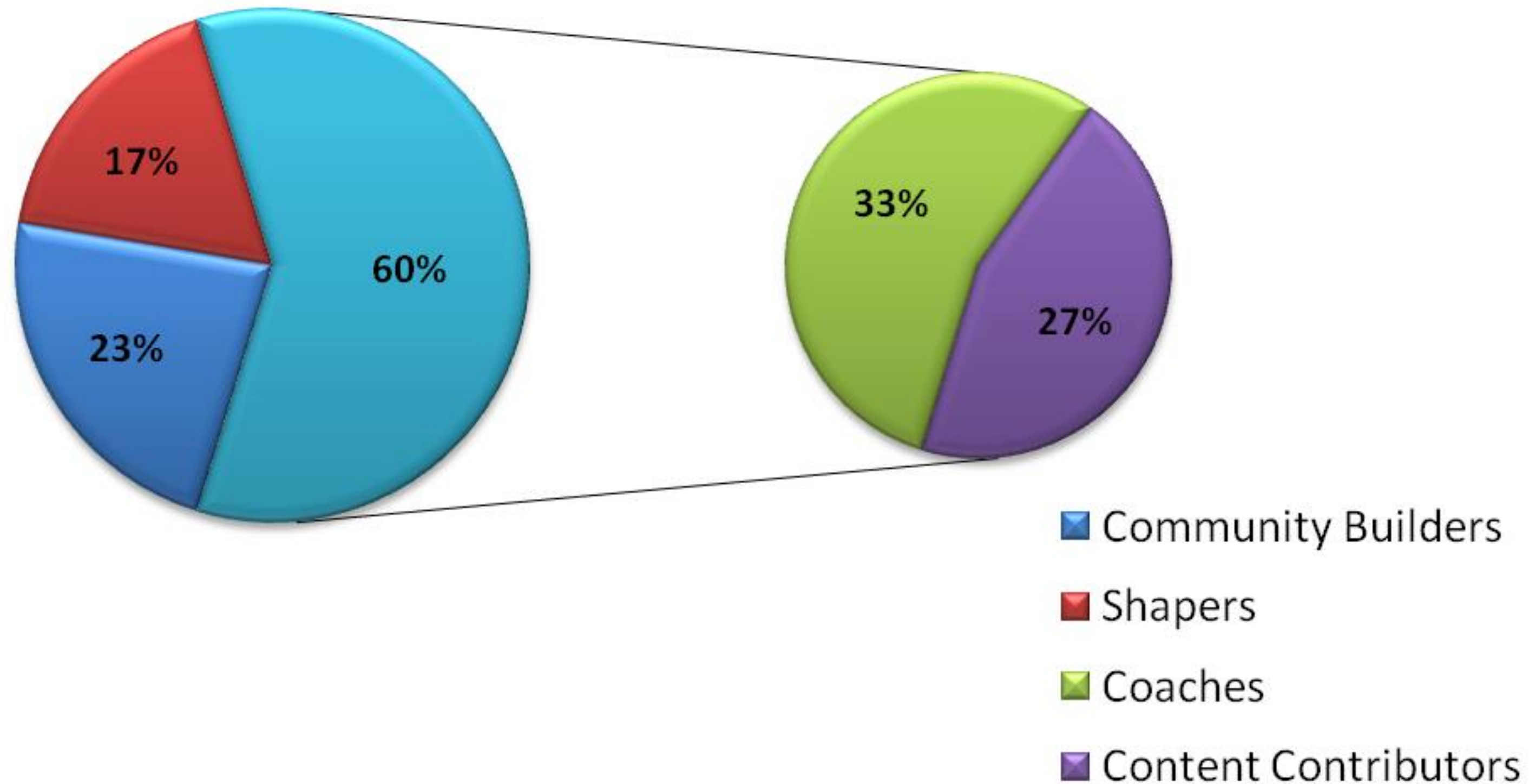
“ The core advantage of data is that it tells you something about the world that you didn’t know before. ”

~ Hilary Mason, Fast Forward Labs



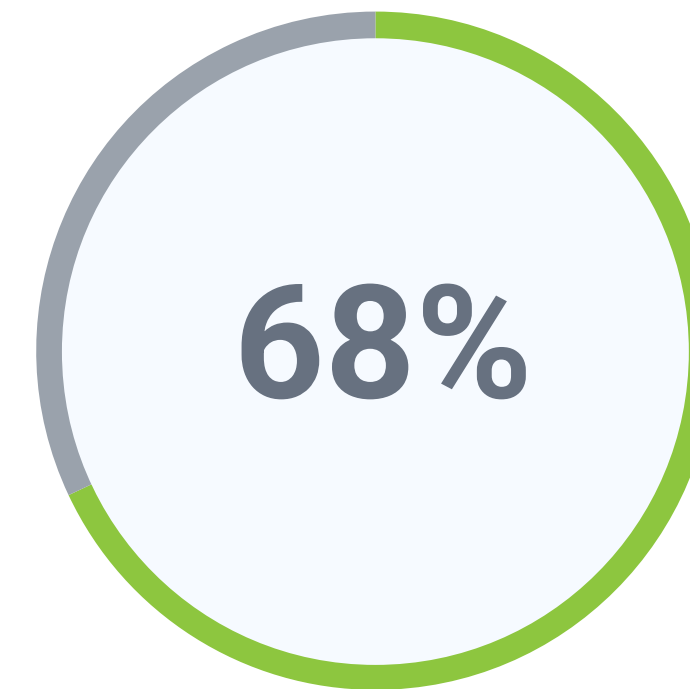
Volunteering Preferences

60% say ad hoc or short-term volunteering preferred

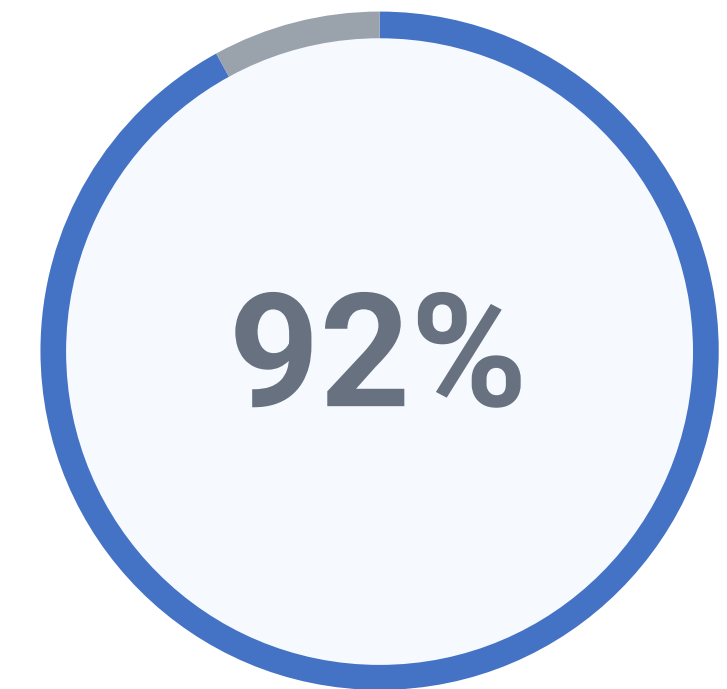


Source: Decision To Volunteer, ASAE

Habits changed during pandemic

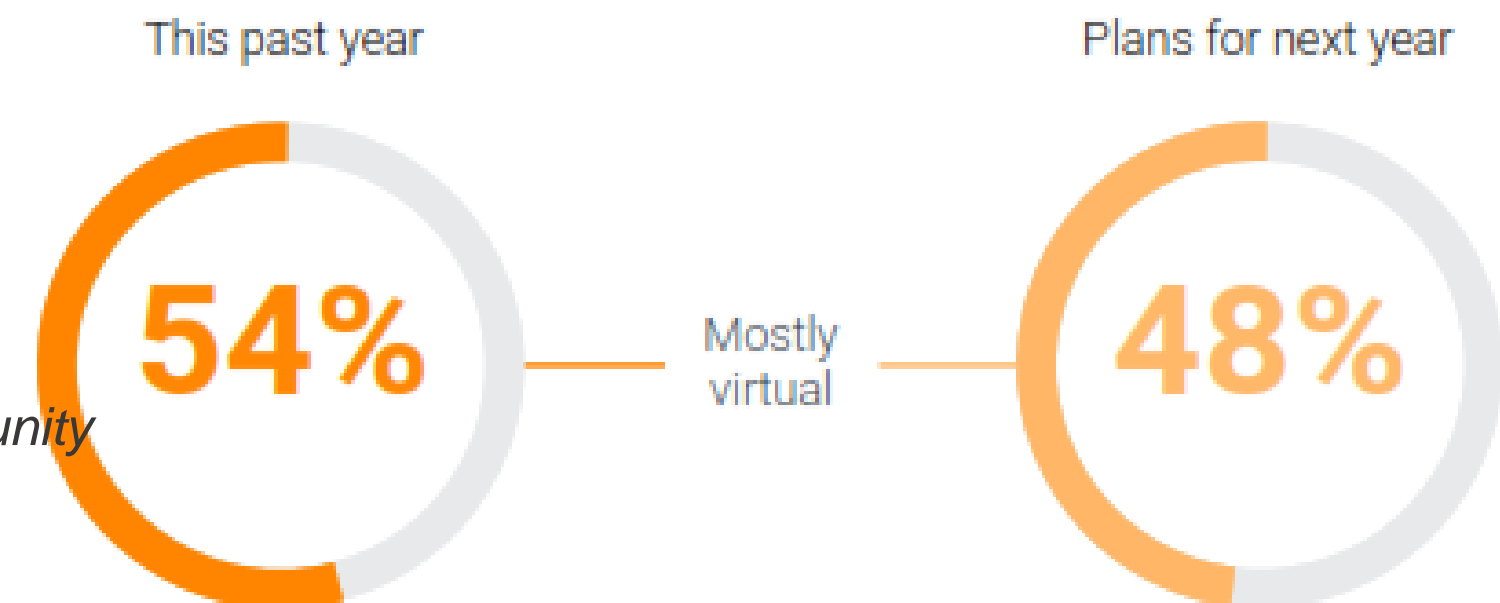
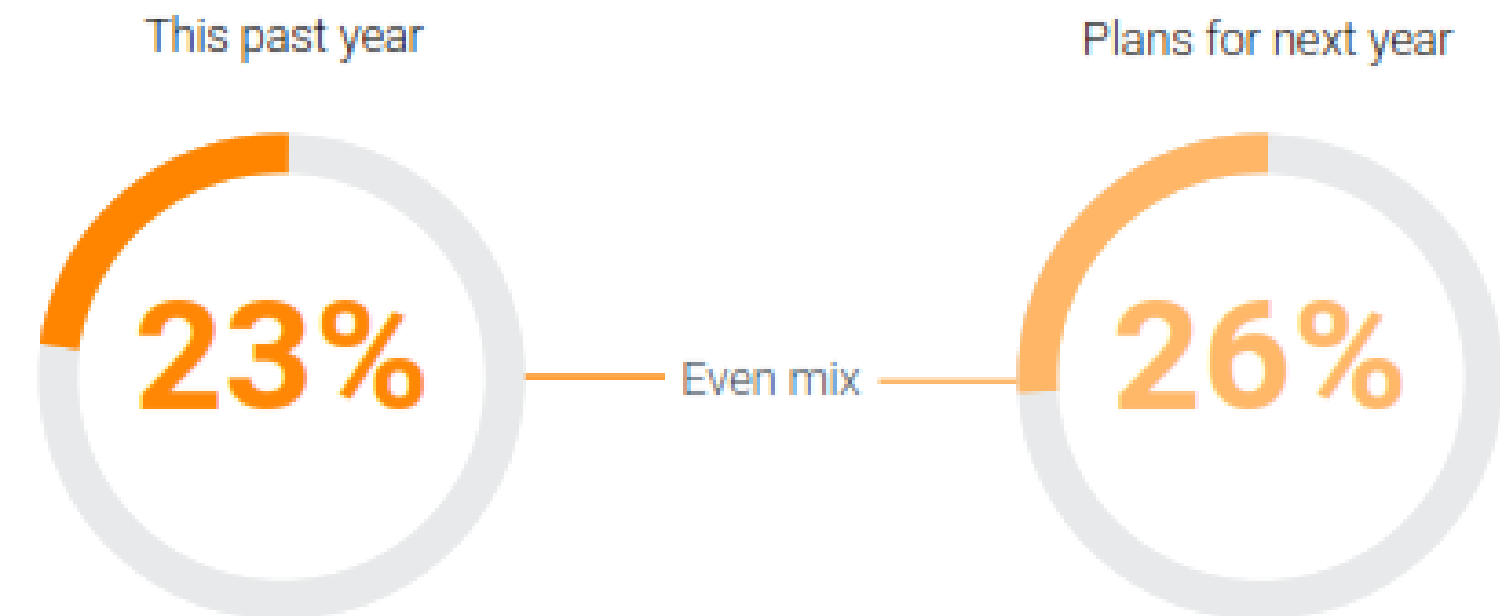
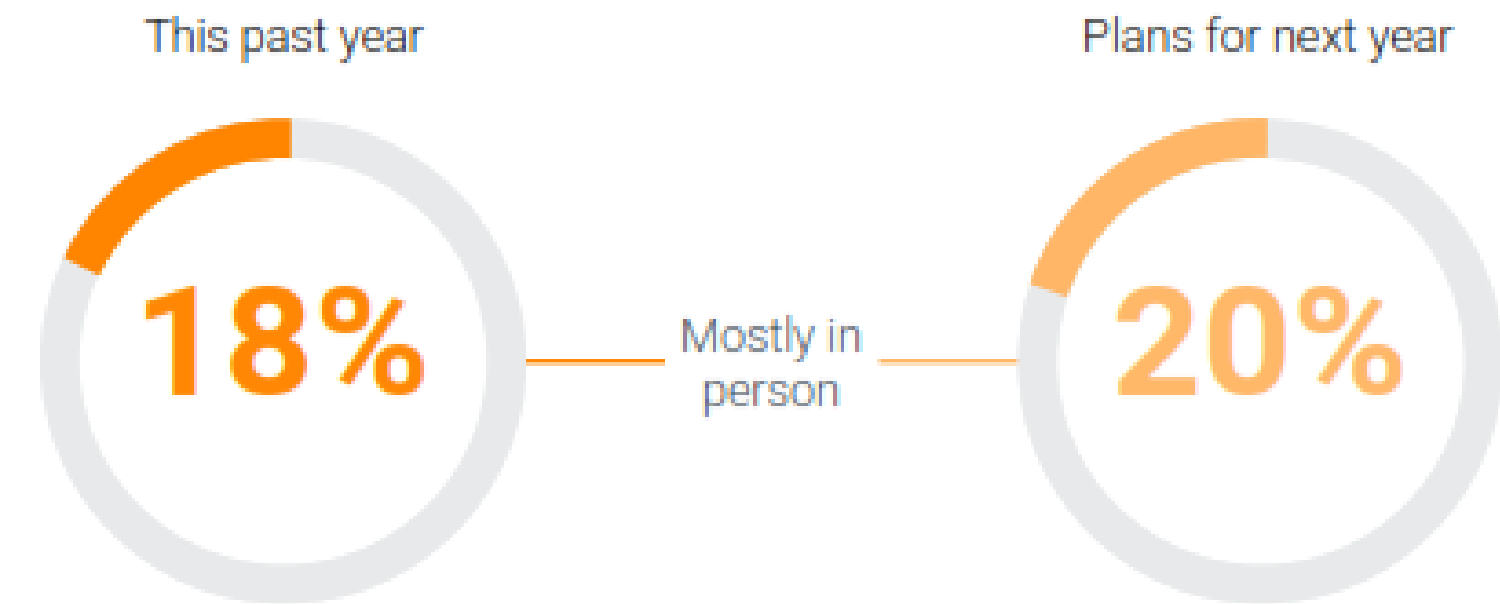


**Access to industry
information**



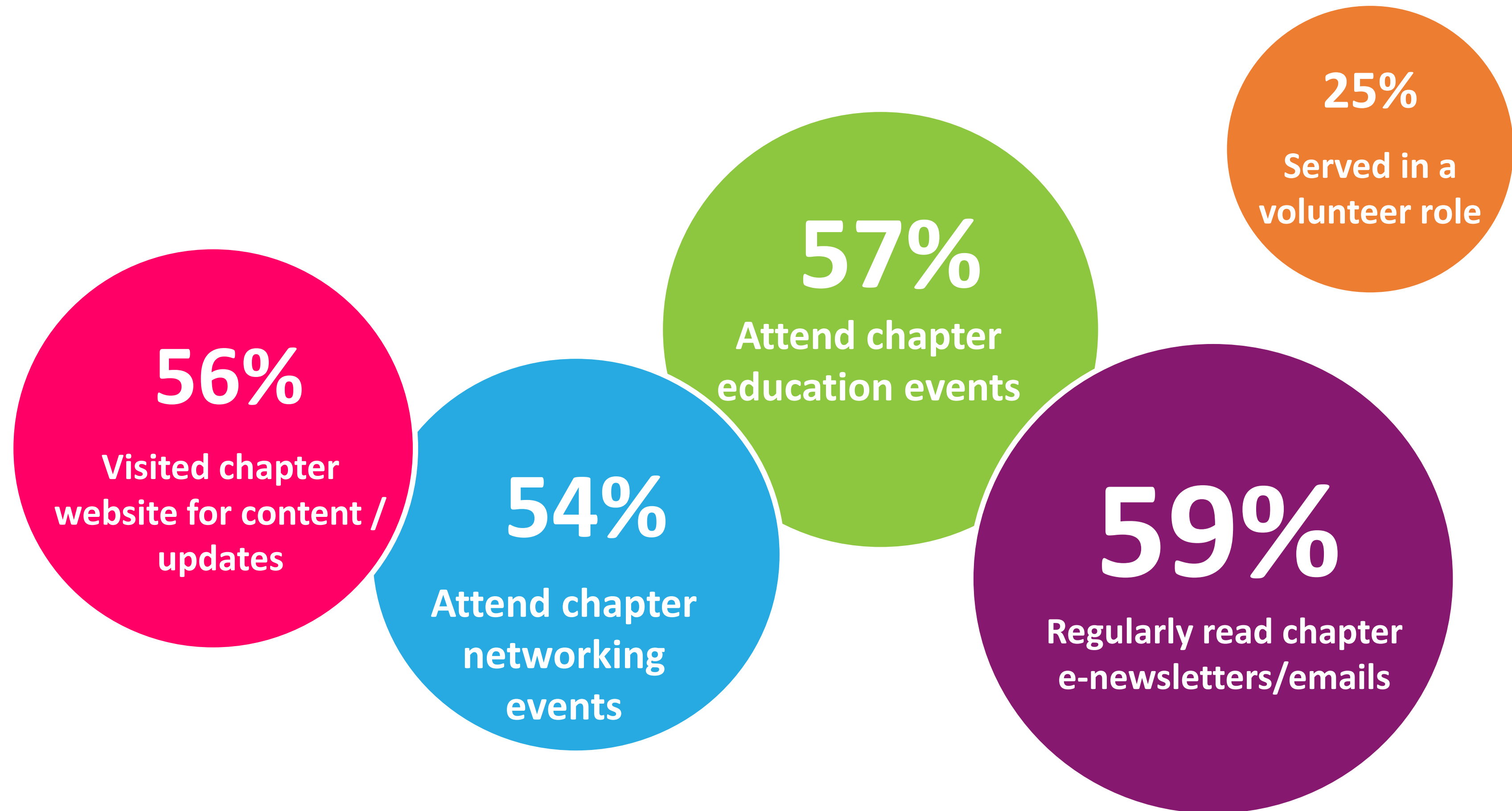
**Online
accessibility**

Virtual is here to stay

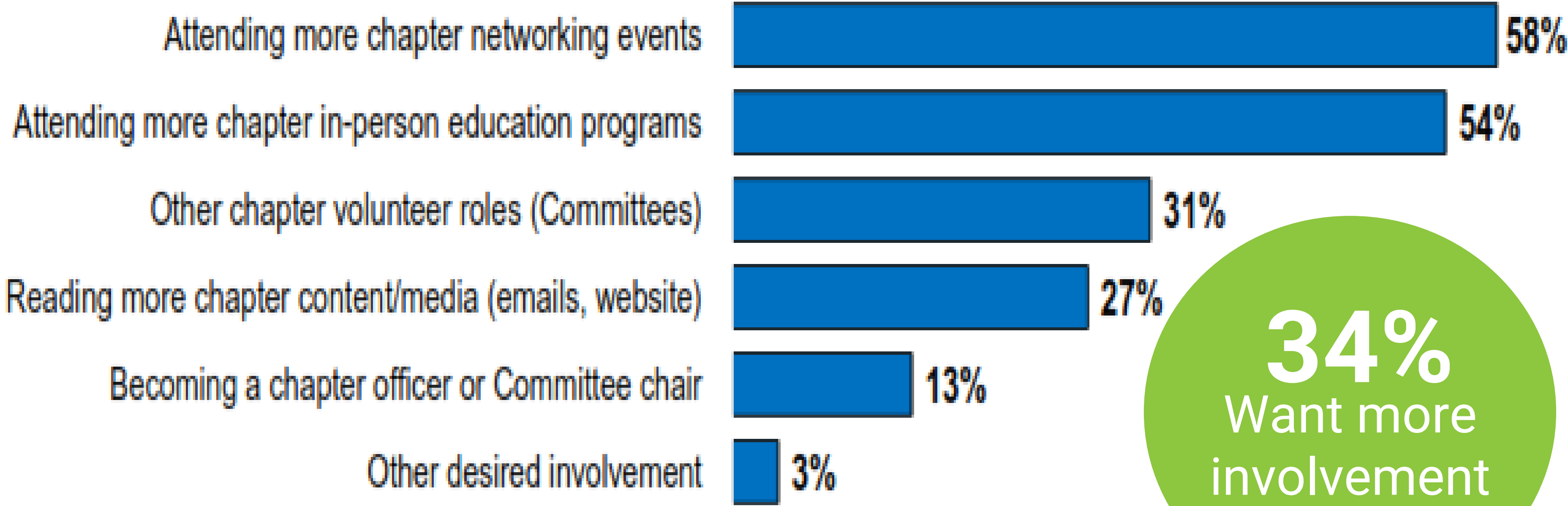


Source: Association Trends 2022: The Future Focused Member Experience, Community Brands

Chapter Involvement



Chapter Involvement



Opens doors you might not see





What data can you tap?



Change the questions

- ✓ What's the profile of those attending & not attending?
- ✓ How else are members connecting?
- ✓ What percentage of members connected in the past year?
- ✓ What other associations or resources do members tap locally?



Change the questions

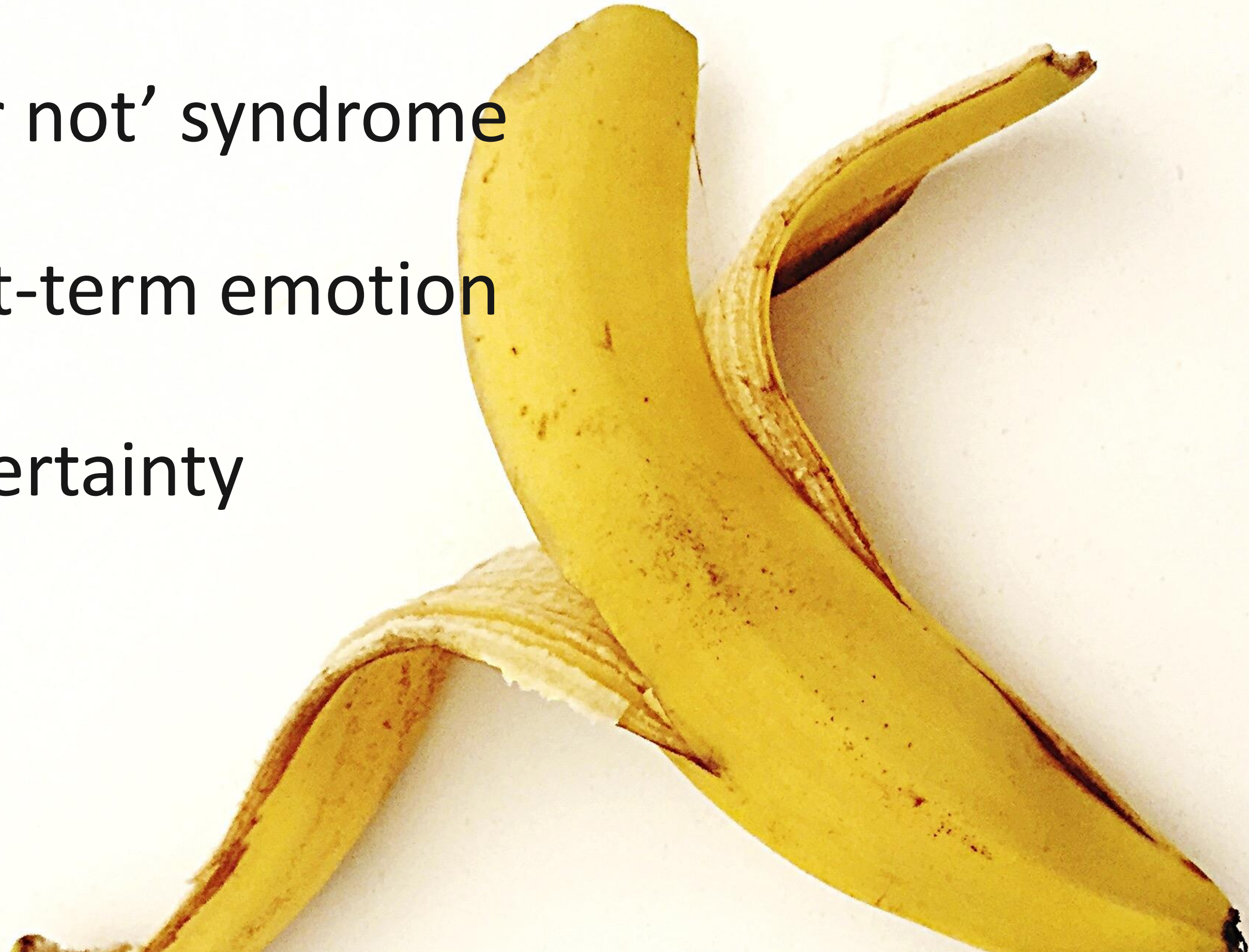
- ✓ What do members need tomorrow?
- ✓ Why do they do prefer virtual or in-person?
- ✓ How are members using technology?

Avoid the pitfalls

The 'whether or not' syndrome

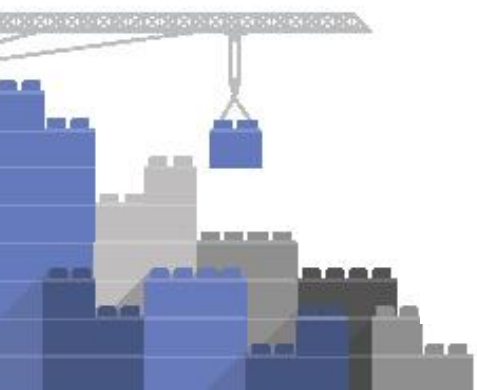
Blinded by short-term emotion

False sense of certainty



“ To make better decisions, use the WRAP process: Widen Your Options. Reality-Test Your Assumptions. Attain Distance Before Deciding. Prepare to Be Wrong. ”

~ Chip Heath, Decisive



- ✓ Widen your options
- ✓ Reality test
- ✓ Attain distance
- ✓ Prepare to be wrong

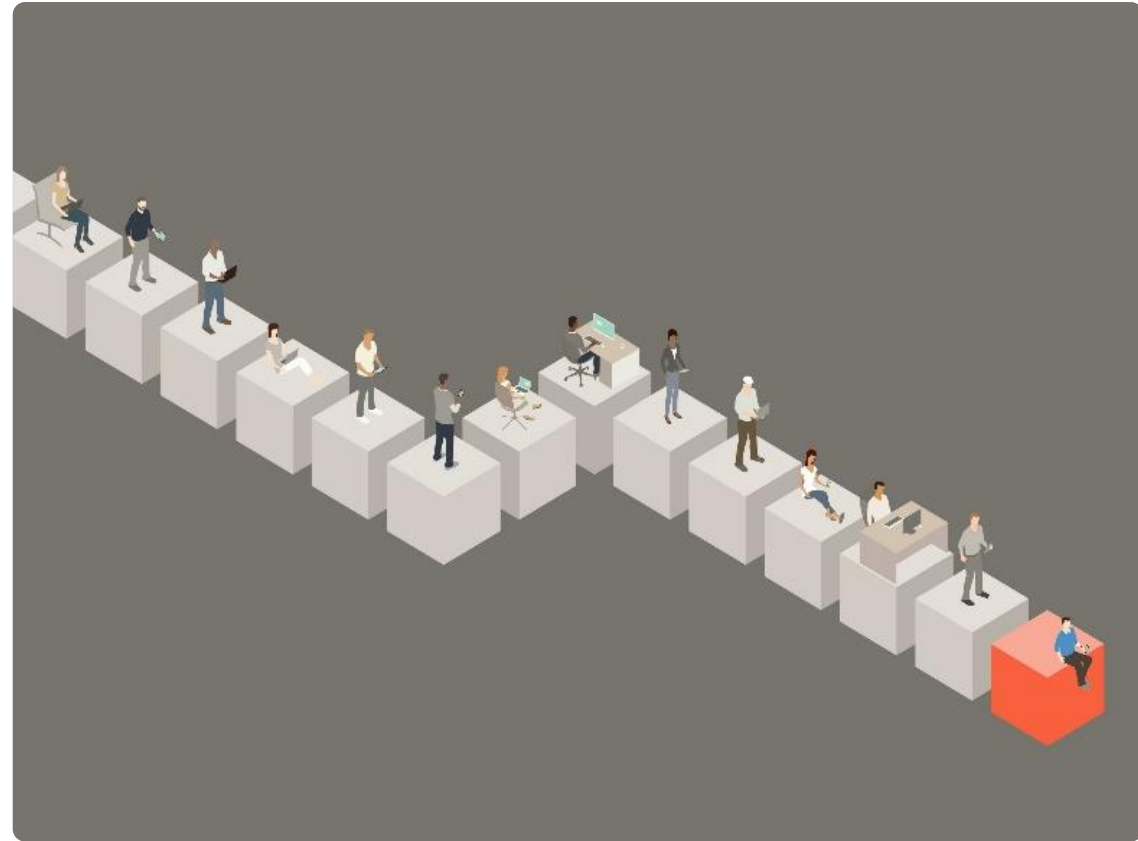
**Decisive: How to Make Better Choices in Life & Work,*
Chip & Dan Heath





Question assumptions & beliefs

- ✓ What are our options – including those less preferable?
- ✓ What is our data around this belief?
- ✓ What if the belief isn't still true?
- ✓ Who else is juggling this issue?



ENGAGEMENT DATA

Individual member activity



SURVEYS

Pre-At-Post



INTERVIEWS

Individual calls
Focus groups



Power of a Chapter Dashboard

- Focused on top priorities
- Guided by data



**How's your Dashboard
looking?**



Challenge

Make better decisions

A rowing team of seven members is shown from behind, standing on a wooden dock and lifting a long, white rowing boat (sloop) high above their heads. They are all wearing white t-shirts and dark shorts with a blue stripe. The scene is set at sunset, with the sun low on the horizon over a body of water, creating a warm, golden glow. The background shows a line of trees and a clear sky.

Vibrant Leadership

Diversity, mix of new & returning leaders, leaders in the wings

Leadership Dashboard

Yellow

Scenario B:

- Most key positions filled with some overlap
- Many (more than 50%) have been on the board for more than 2 terms
- Still have to search for volunteers, may have some identified though not in the wings

How does your chapter onboard volunteers? *

- ☐ Formal onboarding program for all volunteers
- ☐ Formal onboarding program for the board
- ☒ Informal but frequent
- ☐ Infrequent or none

What percentage of your members volunteer (count all volunteering including micro, ad-hoc)? *


- ☐ More than 20%;
- ☐ 10-20%;
- ☒ less than 10%

What's Working *

- RMGPA has a solid membership base made up of passionate professionals.
- We have a core group of dedicated committee heads.
- RMGPA has recently implemented a Mentoring Program.
- We are doing an all-member orientation so members can engage and understand the benefits and resources available to them.
- RMGPA has a handbook that describes job descriptions, policies and bylaws.
- RMGPA has quarterly board meetings but should explore more frequent (i.e. monthly) meetings for higher engagement and collaboration among committee.

What's Not *

- RMGPA should review the volunteer program and make changes as needed.
- RMGPA needs to have a member retention plan.
- The organization needs to do a better job of welcoming, engaging and mentoring new members.
- We need to enhance regular communication with members will help with member engagement.
- Committees should review responsibilities, allocate volunteers and delegate tasks as needed to effectively distribute workload and avoid burnout of individual volunteers.

A group of football players in a huddle on a field. They are wearing white helmets with red and blue stripes and black jerseys with red numbers. The background shows a parking lot with many cars and a yellow school bus.

high member engagement

Translates to retention, acquisition & awareness

Member Involvement Dashboard

Yellow

Scenario B

- Less than one-third of members participate in or attend events regularly
- We need more member to get involved in helping with events, activities or responding
- We lag behind the national member retention rate

What's Working *

- We have a core group of loyal members who are engaging regularly.
- We send surveys after events to understand member satisfaction.

What's Not *

- There is an opportunity to engage members who participate infrequently.
- We have the opportunity to increase communication with our membership. Consider a monthly newsletter.
- We need to be more intentional with surveys to best understand the needs and expectations of members.

Goals *

- Develop an effective communications plan. (See above)
- Have a better understanding of member expectations and needs by more intentional use of surveys (i.e., membership satisfaction survey and other surveys as needed).



Doing the right things ... well

policies & procedures | tracking & reporting key metrics

Operations Dashboard

Green

Scenario B

- Have financial & membership reports to the board though not always monthly
- Accounts payable on-time
- Net income budget goals near or on target
- Have a membership datafile
- Track registration event counts
- Programming or communications schedule has sometimes off

What's Working *

- RMGPA has regular reporting on finances and goals.
- The organization recently changed its membership due structure to be compatible with Club Express.
- RMGPA has a strong relationship with an annual sponsor
- RMGPA has strategic and meaningful partnerships with other entities like, MAPO, CEPC, State Purchasing & Contracts Office, etc.

What's Not *

- RMGPA needs to ensure that food and beverage costs are covered by registration fees at events to ensure profitability.
- RMGPA should consider events that are both valuable to members yet cost effective and profitable to the organization.
- The organization has the opportunity to discover more reporting options through Club Express to best track volunteering and membership data to develop effective action plans.

Metrics that **Matter**

- ✓ **Membership numbers**
- ✓ **Engagement:** volunteering, attendance, participation
- ✓ **Satisfaction:** overall, NPS
- ✓ **Program evaluations**
- ✓ **Financial goals**



Harness the power of data

- Registration data > **develop a profile**
- Communications tracking > **did your message get through?**
- Industry data > **id emerging issues**



A young girl with dark hair and a white shirt is shown from the chest up, with her eyes closed and a gentle smile. She is positioned in front of a dark chalkboard. On the chalkboard, there are several white chalk drawings: a large rocket ship with a circular window and a small antenna, a star with a trail, and a large, faint outline of a person's head and shoulders. The overall scene suggests a creative or educational activity.

Draw members into the process

- Surveys
- Online collaboration (Padlet, Jamboard)
- Whiteboards
- Polling
- ??