

Enhancing Chapter Operations: *The Power of Dashboards*





Friday, April 4, 2025

Hybrid (In-Person + Virtual)
AGU Conference Center, Washington, DC

MARK YOUR CALENDARS!

Up Next in our
webinar series ...



November 13

Ask the Experts

Panel of Pros just waiting to weigh in on your questions, concerns & ideas

Who We Are



What tech tools will help lessen the administrative burden on my chapter leaders?

billhighwaySM
impexium



How do I build more resilient components and volunteers?

 **MARINER**
MANAGEMENT & MARKETING



where chapter reports
go to die

If we even get them ...

Do they even make a difference?

Meet Our Storytellers



Jennifer Steffan

Chapter Relations Manager
NIGP



Christi Beatty, CAE

VP, Chapter Services &
Membership Engagement
AGC of America

WHY:

- Ways to align and support Chapters
- Engage our Chapter Leaders a new way during our Leadership Training

How:

- From the Top-down
- In-Depth Survey
- Restructure of Chapter Leadership Training

What:

- Shared vision of success through an easy-to-use dashboard
- Enhanced Chapter Ambassadors
- New Subject Matter Experts program
- Technology to align, brand, and address administrative needs through a Website Program

Chapter Dashboards – *OpenWater*

→ Leadership → Operations → Member Involvement → Member Services

The screenshot shows the 'NIGP Chapter Dashboard 2022' for user Jennifer Steffan. The dashboard includes a navigation menu on the left with options like 'Home', 'My Applications', 'My Judging Assignments', 'My Profile', and 'Admin Panel'. The main content area is titled 'What's Your Chapter Setting' and contains several input fields and radio button options. The fields include 'Chapter' (a dropdown menu), 'Applicant' (a text field with 'Jennifer Steffan'), and 'Chapter Title'. Below these are three sections: 'No. of Total Members' (with a text input), 'Annual Average Retention Rate' (with a percentage input), and 'Primary service members seek from chapters' (with a text input). Each of these three sections has associated radio button options for 'No. of Members Trend' and 'Annual Average Retention Rate Trend', with choices: Growing, Maintaining, Dropping, and Don't know.

- **Playbook** for setting goals and metrics – based on what research says is success
- **Guide** for making decisions about priorities and strategies
- **Tool for annual planning** – highlight what's worked, what's not and identify questions for your CA, NIGP staff and other leaders
- A channel for NIGP & its Chapter Ambassadors to spot trends and success stories - which we can then share and act on



Chapter Dashboard - Going Forward

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. The four areas are:

- Vibrant **leadership** with a clearly defined and operational succession plan
- 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 chapters, the values varied. For example, under member services one chapter might find a focus on virtual events allows a geographically spread-out membership to engage while a reverse trade show is a must-have event for another. Successful chapters effectively differentiated between what they could do and what they should do.

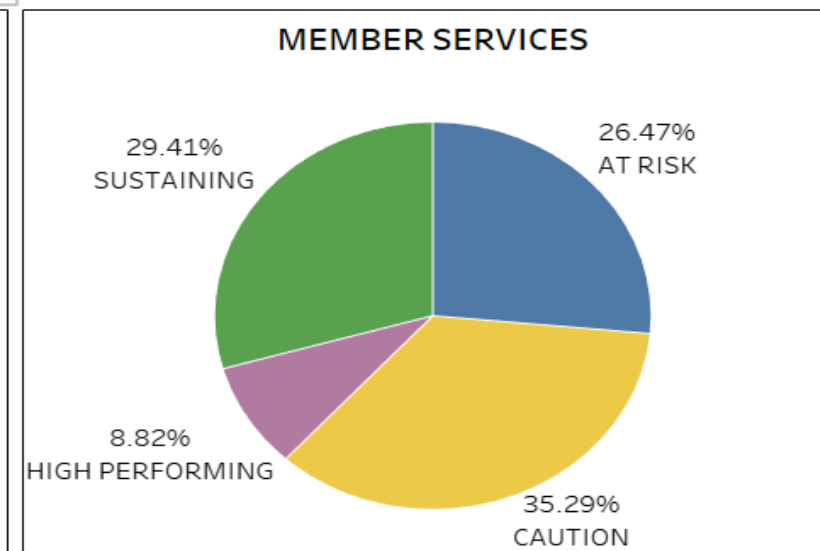
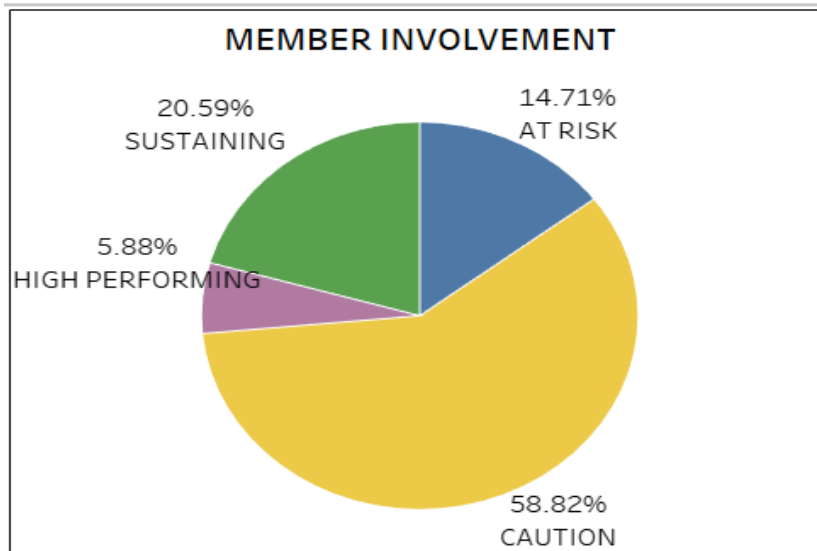
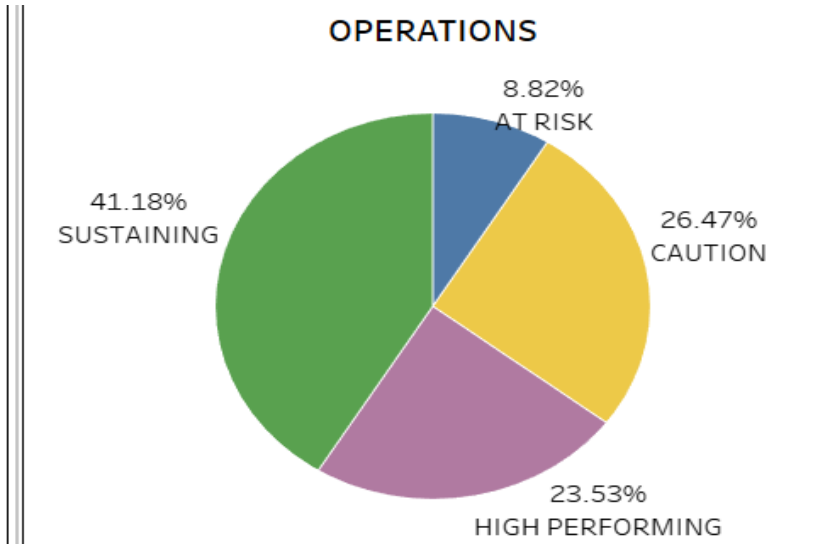
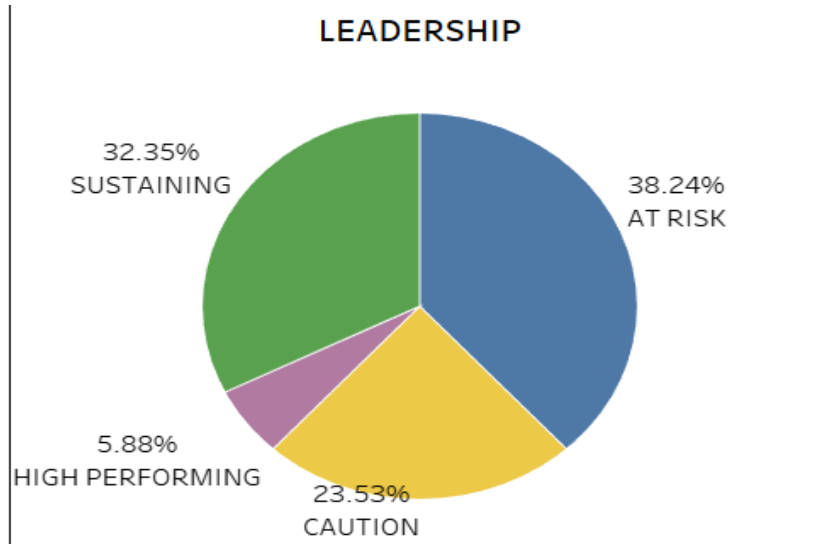
Finding Your Chapter's Setting

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 you take to improve or maintain settings.

- Name Change
- Collaborate – Complete during Board transition
- Resources and Webinar on use
- Required yearly document

Chapter Dashboards Results – *Tableau*





AGC
THE CONSTRUCTION
ASSOCIATION

October 23, 2024

How a Benchmarking Self-Assessment Tool Can Help Chapters

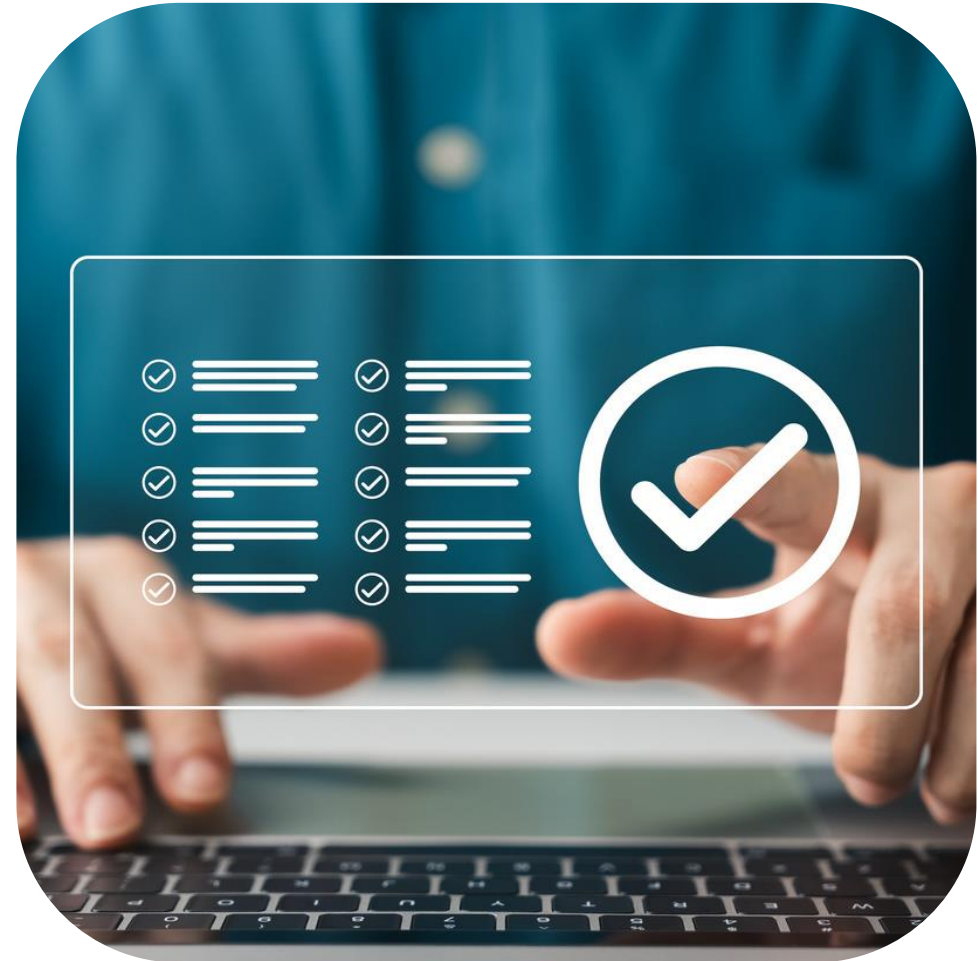
Speaker:

Christi Beatty, CAE, Vice President of Chapter Services & Member Engagement,
AGC of America

What it is



- The AGC Chapter Self-Assessment is a **tool** to measure and benchmark a chapter's annual performance.
- It's an **online survey** created by chapter executives for chapter executives.
- It includes two surveys in one (chapter demographic survey and benchmarking) - 100 questions.
- Includes dynamic reporting features that allow you analyze and share results.

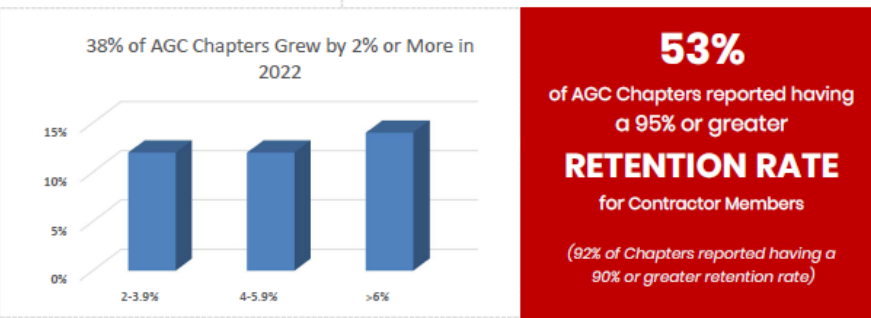
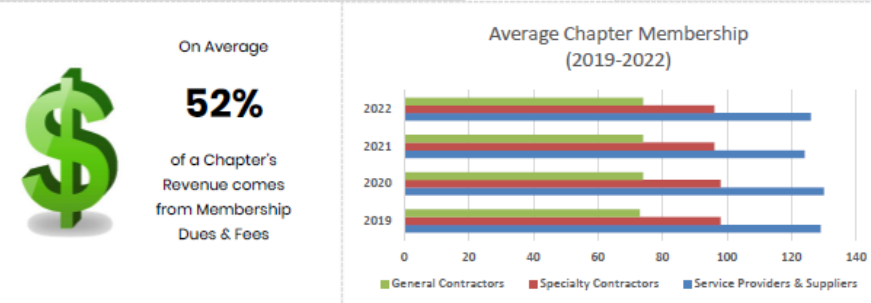
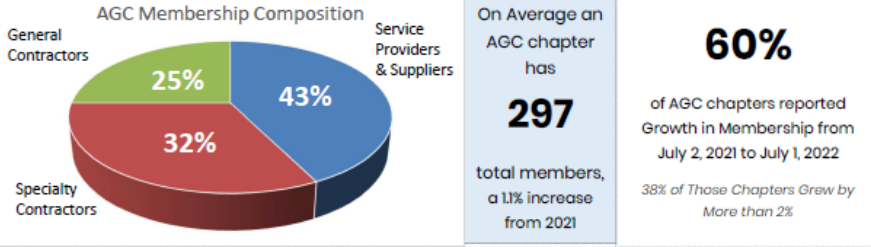




2022 CHAPTER DEMOGRAPHIC SURVEY

AGC of America conducts an annual demographic survey of its chapters in order to provide a more valuable picture of its 89 chapters. The survey contained questions relating to chapter membership, budget and dues, member services, leadership, and communications. In 2022, 74 of AGC's 89 chapters completed the demographic survey, representing a response rate of 83%.

MEMBERSHIP

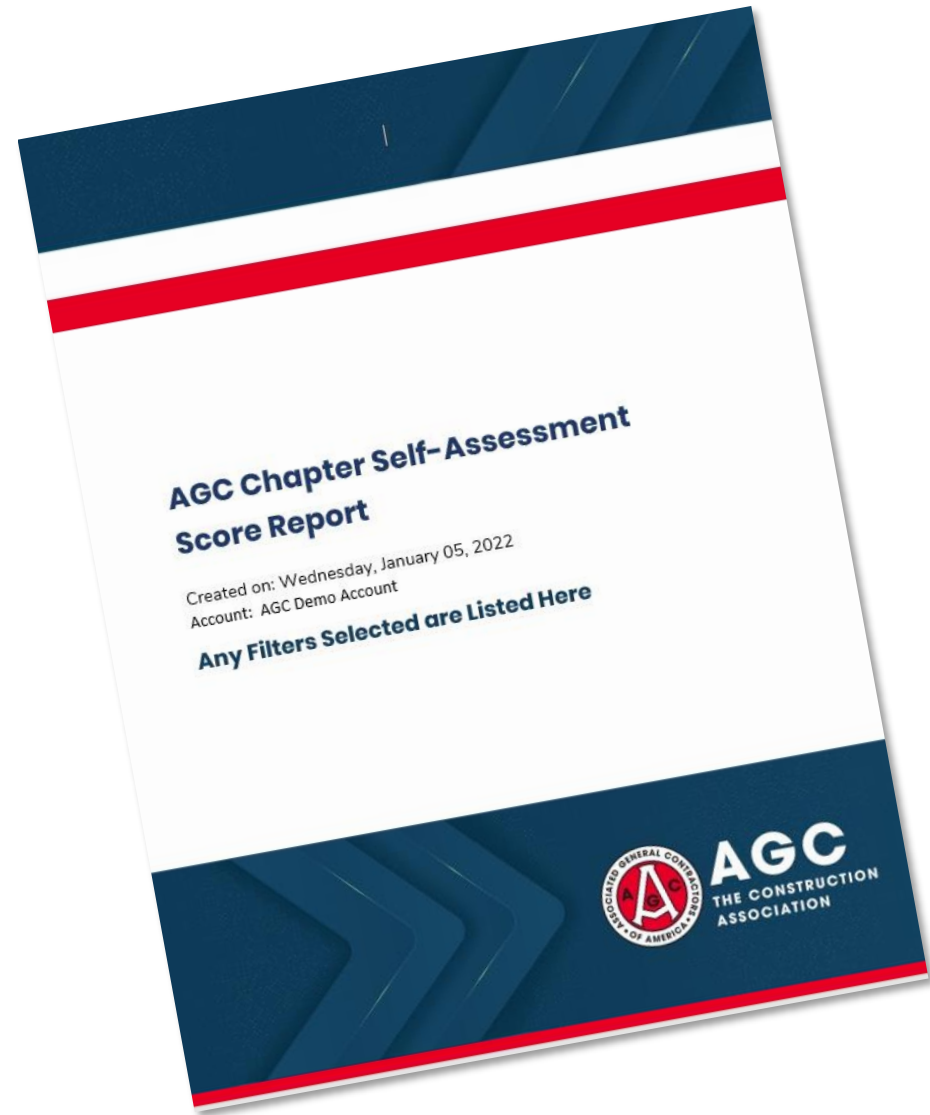


Chapters and Leaders gain access to Annual Demographic Survey Results

Self-Assessment Scorecard

- ✓ Shows scores by best practices category
- ✓ Dynamic based on filters selected
- ✓ Explains what your scores mean
- ✓ Provides best practice guidance
- ✓ Links to valuable association management resources

AVAILABLE SOON



How it works

- Takes ~ 30-45 minutes to complete.
- Entire chapter team can help complete it.
- Launches in late summer/early fall each year.
- Results, reports and scorecard available in the fall/winter.
- Participants access results by completing all required questions.





What we measure?

1. Membership (Growth & Retention) & Engagement
2. Operations and Financial Viability)
3. Communications
4. Leadership
5. Member Service (no score assigned for this section)

ELC 2025 Goal: 80% of AGC Chapters are High-Performing



1. Customer Loyalty & Acquisition

- A. Three-year rolling contractor **member retention** percentage of 95% or better (median for U.S. Trade Associations is 90%.) Retention to be calculated as follows:

$$\text{(End Count - New Members)} \div \text{Start Count} = \text{Retention Rate}$$

- B. Five-year average **contractor member net growth**
- C. Local **market penetration** (4 options for measuring)
 - 1. 50% or more of the dollar volume in the market, or
 - 2. 50% of ENR 400 measurement, or
 - 3. 50% of the number of contractors based on U. S. Census Bureau data, or
 - 4. 50% of local business journal lists or other reliable local sources

ELC 2025 Goal: 80% of AGC Chapters are High-Performing




2. Financial Viability

- A. Average **annual net operating income** over three years greater than zero and/or as needed to maintain an appropriate level of reserves, and
- B. **Financial reserves** totaling at least 6-12 months of annual operating expenses.

Step 1: Login to Access Survey

Home Contact Us

AGC CHAPTER SELF-ASSESSMENT



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MEMBER LOGIN

User :

Password:

SUBMIT

[Click here](#) if you have forgotten your password

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<http://chaptersurvey.agc.org>

AGC CHAPTER SELF-ASSESSMENT



2024 Data Collection Is Now Open!

For access to results, you must answer all required questions.

How to enter data:

- Click on each section to enter data for your chapter, starting with the *Profile* section.
- **Past Survey Participants:** Use the *Copy Prior Year Data* feature on each data entry page to pull forward, view, update, and save your previous year's data on a page-by-page basis. Data entry for previous years remains open to enter or edit your data.
- View the [User's Guide](#) for basic instructions.
- Need help collecting the needed data ahead of time? Click the *Download* icon on the home page.

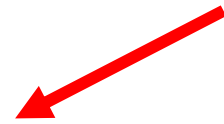
Results:

- 2024 results will be available once a sufficient amount of data is collected.
- Results for previous years remain open for participating chapters. To access results for previous years, change the year drop-down menu in the upper right-hand corner.
- Visit the **Results: All Reports** tab to download dynamic, personalized reports.
- Visit the **Results: By Question** tab to view question-by-question comparisons, including pop-up charts for each question.
- To protect data anonymity, results are displayed for questions with five (5) or more responses.

Questions?

Be sure to visit the **Support** page for additional information and resources (the link to the **Support** page is located in the upper right-hand corner of the site), or contact the support team at chaptersupport@agc.org.


Continue to Survey



Step 2: Complete each section of the assessment

★Welcome Message★ | My Account | Support | Logout

AGC CHAPTER SELF-ASSESSMENT



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Welcome: AGC Demo | Company Name: AGC Demo Account

Home | My Data ▾ | Question by Question Comparisons ▾ | Dynamic Reporting | Year: 2024 ▾

My Data | Question by Question Comparisons | Dynamic Reporting

Profile

- Chapter Profile
- Office Operations
- Welcoming Experience
- Member Services

0% complete

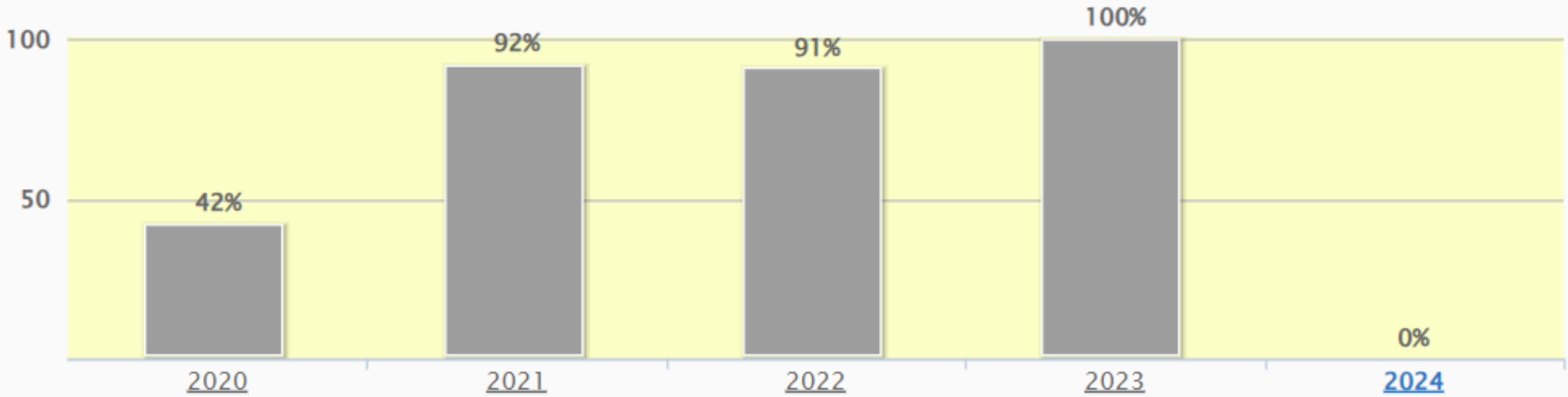
Assessment

- Operations & Admin
- Communications
- Mbrshp & Engagement
- Leadership & Volunteers
- Scores

0% complete

DOWNLOAD

Progress Report



This account qualifies for access to results for 2024.

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What if improvements are needed?



- Ask for an ELC Mentor.
- Connect with a high-performing Chapter.
- Tap into the Chapter Resource Directory on the AGC Chapter Exchange.
- Attend the AGC Convention and participate in the Chapter Staff Education Program or an ELC Best Practices Program.
- Attend the ELC Conference in June.
- Attend the National & Chapter Leadership Conference and bring your leaders.
- Ask for help!





Contact Me



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Billhighway Success Stories



RIMS

RIMS Relies on Billhighway to help Staff & Volunteer Leaders Manage Chapters Around the Globe



SWE

SWE Strengthens Its Support of Global & Domestic Components with Billhighway



LPGA, AOC & USBG

Three Impexium Clients Explain Why They Love the Billhighway Chapter Performance Solution

Tap us for...

Billhighway

With Billhighway, you can see chapter performance data in real time—no more nagging chapters for:

- Current financial reporting
- Chapter member engagement data
- Number of events they're hosting
- Types of events they're hosting
- Percentage of members and non-members attending

Want more? [Contact us](#) for a 15 minute chat.

Mariner Management

Your chapters need help? You need help with your chapters?

- Discovering your chapter ROI
- Innovating your chapter structure
- Rethinking your volunteer strategy
- Training & developing chapters leaders

Want more? [Contact us](#) for a 15 minute chat.



Thank You!



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