Sample Chapter Dashboard

Divided into 5 sections:
1. Chapter Setting
2. Leadership
3. Operartions
4. Member Involvement
5. Member Services

Each section is followed up with the following open ended questions (except chapter setting)

➢ What Working?
➢ What's Not?
➢ Goals
➢ Questions and Notes

NIGP Chapter Dashboard

Manage Collaborators

Chapter's Setting → Leadership → Operations → Member Involvement → Member Services

Chapter *

(select) ⌄

Applicant *

Kaitlyn Mankin

Chapter Title *

What's Your Chapter Setting

Fill in the numbers for your chapter as best able and then complete the guiding questions. Based on the responses, fill in the initial dashboard.

No. of Total Members *

Dual and Chapter-only members.

No. of Members Trend *

○ Growing
○ Maintaining
○ Dropping
○ Don't know

Annual Average Retention Rate *

%

Annual Average Retention Rate Trend *

○ Growing
○ Maintaining
○ Dropping
○ Don't know

Primary service 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. If you haven't recently surveyed members, then say "not sure but believe [insert]"

Leadership Best Practice

A core group of volunteers with an identifiable leader and leaders in the wings

Which scenario best describes the current board? *

Scenario A:

- All key positions filled by different people
- 50% or more are new or people serving their 1st or 2nd term
- Volunteers in the wings (who are being groomed for leadership); we don't struggle to find volunteers

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

Scenario C:

- Positions open on board
- Most have been on the board for a number of terms and/or are back on the board
- Struggle to find volunteers

○ Scenario A
○ Scenario B
○ Scenario C

Are your election of volunteers in accordance to the bylaws and/or written procedures? *

○ Yes
○ Not really

Does your chapter have an active leadership succession plan? *

○ Yes, a formal plan in use
○ Yes a plan on paper
○ Handles informally
○ Don't have

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%

NIGP Chapter Dashboard

Operations Best Practice

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

Which scenario best describes your Operations? *

Scenario A

- Have <u>monthly</u> financial & membership reports to the board
- Have a positive operating cash flow
- Have on-time accounts payable
- Meet net income budget goals
- Operate & maintain membership database
- Track registration by individual and event counts
- Meet programming/ communications schedule

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

Scenario C

- Financial & membership reporting is limited or not made to the board
- Struggle with one or more positive operating cash flow, on-time accounts payable, meet net income budget goals, maintain membership datafile, meet programming/ communications schedule

- ○ Scenario A
- ○ Scenario B
- ○ Scenario C

Have annual written business plan? *

- ○ Yes, created each year & its monitored monthly
- ○ Yes, we update last year's
- ○ The president has one

Have reserve policy? *

- ○ Yes
- ○ No

Have reserve policy? *

○ Yes
○ No
○ Not sure

Have a positive NPS? *

Net Promoter Score (Customer Loyalty)
○ Yes
○ Not sure/don't track

What individual activity do you track? *

☐ Membership
☐ Volunteering
☐ Registration
☐ Event attendance
☐ Activity participation
☐ Other
☐ None

What percentage of annual operating budget held in reserves? *

○ 50%+
○ 20-49%
○ <20%

Generate regular reports and trends on membership (e.g. counts, retention, new members, member categories)? *

○ Yes
○ No

What's Working *

NIGP Chapter Dashboard

Member Involvement 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

Which scenario best describes your Member Involvement? *

Scenario A

- One-third or more of members participate in or attend several events/activities annually
- We are generally covered when it comes to tapping members to commit time to speak, facilitate, respond to inquiries
- We have a strong member satisfaction score
- We meet or exceed the national member retention rate

    (NIGP Membership 16,107   Annual Average Retention Rate 93%)

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

Scenario C

- We do not know how many members engage or know that fewer that one quarter of members participate in or attend events regularly
- We struggle to get members to help with events, activities or responding to communications
- We lag behind the national member retention rate

○ Scenario A
○ Scenario B
○ Scenario C

What percentage of members have attended or participated in at least one event in the calendar year? *
○ More than 50%
○ 25-50%
○ less than 25%

What percentage of your members volunteer (count all volunteering)? *
○ More 20%
○ 10-20%
○ less than 10%

What percentage of Chapter members also hold NIGP membership? *
○ More than 90%
○ 75-90%
○ 50-74%
○ Less than 50%

What percentage of Chapter members are new professionals? *
%

[   ]

Which if any statistics measuring member involvement are collected for/by the chapter? *
☐ Open/click-thru rates on e-letter/email
☐ Website visits
☐ Newsletter readership (e.g., reader survey)
☐ Other
☐ None

NIGP Chapter Dashboard

Chapter's Setting → Leadership → Operations → Member Involvement → Member Services

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.

Which scenario best describes your Member Services? *

Scenario A

- We conduct event surveys and regularly receive high satisfaction ratings
- Our events meet or exceed registration goals
- We conduct member surveys and regularly receive high satisfaction ratings

Scenario B

- We occasionally conduct event surveys
- Our events meet registration goals at least 50% of the time

Scenario C

- We do not regularly conduct event surveys or have low response rate
- Our events do not always meet registration goals

○ Scenario A
○ Scenario B
○ Scenario C

Has your chapter collaborated with another NIGP chapter or similar to create a member event (educational or networking)? *

○ Yes, more than once
○ Yes
○ We're currently working on an event
○ No

Does your chapter have a strategy for having both virtual and in-person events? *

○ Yes, and our calendar includes both
○ Our focus will be on in-person in the coming year
○ Our focus will be on virtual in the coming year
○ Other: (explain)

Has your Chapter done something different to meet member needs? *

Example: a different event, a new service, switched websites, created a new communication

○ Yes (briefly describe)
○ We are planning to (briefly describe)
○ No
○ Other: (explain)

Then all completed submissions are scored and given a color of their status.

Chapter Dashboard Key Code

Purple = High Performing

Green = Sustaining

Yellow = Caution

Blue = At Risk