



**A Benchmark Study of  
Chapter Networking Programs and  
Member Engagement**

**For  
Canadian Society of Association Executives  
Trillium Chapter**



**Submitted by**

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## **I.0 EXECUTIVE SUMMARY**

“When you start with an honest and diligent effort to determine the truth of your situation, the right decisions often become self-evident. It is impossible to make good decisions without infusing the entire process with an honest confrontation of the brutal facts.”

*Jim Collins – Good to Great*

It has often been said that “the truth hurts.” Someone also once said “no pain, no gain.”

If these sayings are indeed true, the Canadian Society of Association Executives Trillium Chapter is should be anticipating a new era of growth and relevance.

During its 2005/2006 season, the CSAE Trillium Chapter Board of Directors determined that in order to staunch the flow of membership cancellations that were on the incline and quell the rumble of disgruntled members, aggressive tactics would need to be followed.

As painful as the truth may be, the Chapter sought out answers from its members so that it could respond and act accordingly.

Beginning with a survey of its Executive Members in June 2005 and continuing with an in-person forum with its Business Members in December 2005, Trillium Chapter faced the brutal reality of why its members were unhappy and began a process to heal rifts, break down silo walls and build value for the members.

For many association members, the value of their membership is often found in the relationships that they have made.

Relationships don't just happen of course. They are borne out of opportunities found within the association community especially those that encourage networking.

Networking connects members with each other for mutually beneficial assistance or support and sometimes can be the sole reason that a member will belong, particularly if

they are a supplier member. Networking is possible at education and social events but it needs to be encouraged, even promoted, in order to be meaningful.

Networking, despite being an intangible, can be classified as a member program or service because it adds value to membership.

This document acknowledges the important role that networking plays in the life of an association and attempts to measure it as it would measure other programs and services.

The premise of this study is if member networking is successful, members are happy, engaged and less likely to leave.

Hopefully the truth of this will become evident and will provide CSAE Trillium Chapter with a foundation for future growth and membership value.

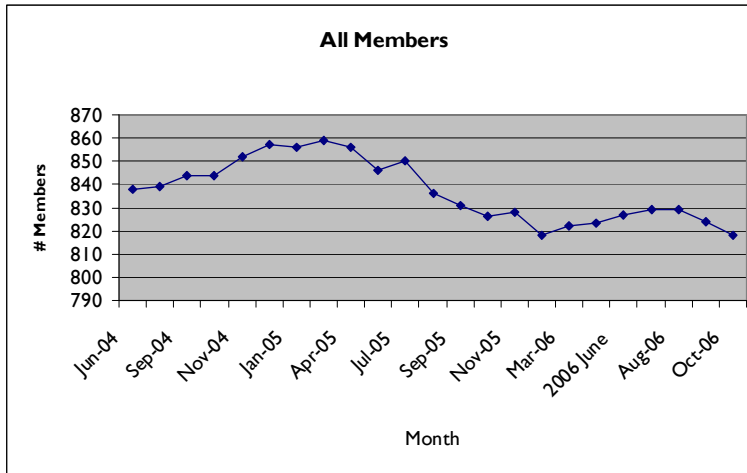
## **2.0 SITUATIONAL ANALYSIS**

The Canadian Society of Association Executives (CSAE) Trillium Chapter is the regional voice for association professionals spanning a large geographic region that covers Windsor to Kingston and Toronto to Northern Ontario. Trillium is the largest of CSAE's chapters and because of its size has a tremendous amount of influence on overall membership growth and retention.

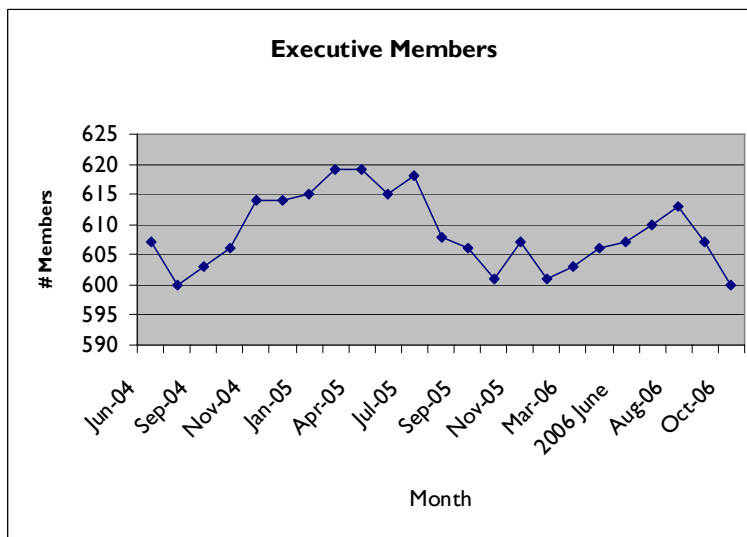
Trillium Chapter provides a grass roots access point into the association through its very successful educational activities. For many CSAE members, how well the chapter association performs and fulfills their needs has a direct influence on how they perceive the national association. For this reason Trillium Chapter carries quite a bit of weight and responsibility as an organization when it comes to recruiting and retaining members.

## 2.1 Status of CSAE Trillium Chapter Membership

CSAE Trillium Chapter membership is made up of Executive, Business, Honourary and General Members. Since June of 2004, membership numbers have reached a high of 859 in March 2005 and a low of 818 more recently in October of 2006. There has been an average of 837 members since June 2004.



The number of Executive Members has been as high as 619 in March 2005 and as low as 600 in October 2006. The average number of Executive members over twenty three months is 608.



There has been a steady decline of Business Members since June 2004. At their peak, there were 243 members (December 2004) and a low of 216 (August 2006). The average number of business members over twenty three months is 228.



CSAE Trillium Chapter Membership Status as of October 31, 2006 is as follows:

Business Members – 218

Executive Members – 600

The ratio of Executive Members to Business Members is currently 73/27.

## 2.2 Geographical Distribution of Chapter Membership as of July 2006

Region	# of Members	Percentage of Total
Hamilton/Halton/Niagara	87	10.03%
Peel	104	12.00%
Guelph/Kitchener/Waterloo	28	3.23%
Muskoka/Northern Ontario	30	3.46%
Toronto	506	58.36%
London/Windsor	26	3.00%
Eastern Ontario	10	1.15%
GTA (i.e. surrounding Toronto)	64	7.38%
Other	12	1.38%
Total Members	867	

### 2.3 Environmental Scan

Over the past two seasons, Trillium Chapter has been struggling with declining member engagement and a downward slide in membership numbers.

Changes to program delivery, particularly Trillium Chapter's education program, has been identified as a potential cause for disgruntlement amongst CSAE's Business Members. Networking opportunities that used to exist at Chapter "*Lunch and Learn*" events, disappeared with the introduction of the new G.I.V.E. (**G**ain **I**nsight, **V**alue and **E**ducation) Program. Therefore one of the prime reasons for belonging to the association no longer existed for Business Members.

Between May 16, and June 2005, CSAE Trillium Chapter conducted a survey with its 613 Executive Members to determine the major issues confronting these members so that it could "develop a value proposition for products, programs and services that encourage retention, promote recruitment and encourage participation." [CSAE Trillium Chapter: Member Survey, Infofeedback Survey Services Inc., 2005]

Of the 174 respondents, 66% indicated that they either agreed or strongly agreed that they would be more likely to take advantage of Trillium events if they could have a greater opportunity for networking and learning from their peers. 86% indicated that they would be more likely to interact with colleagues if Trillium were able to facilitate ways for members with common interests, similar types of associations, and/or issues to get in touch with each other.

On December 12, 2005, CSAE Trillium Chapter invited its Business Members to participate in a forum to express their views on the value of CSAE membership and provide input into how the Chapter delivered programs and services. Participants expressed their concerns that opportunities for business member engagement was limited and that the new education format did not encourage networking.

As a result of the Business Member Forum, the following recommendations were made:

1. A regular, dependable calendar of events, provided at least six months in advance.
2. Pricing opportunities for Business Members (E.g. Subscription series or the opportunity to host or invite an executive member at a reduced rate)
3. Five networking events per year.
4. Survey members regarding their business needs plus a mechanism to connect Executive Members with a specific event
5. Resources for new Business Members including a) Sponsorship opportunities; b) Orientation; c) Calendar of Events; d) “How to Approach Executive Members”; e) How to submit speakers or venue ideas

## **2.4 CSAE National Strategic Plan**

In 2006, CSAE released a draft strategic plan to guide and direct the association over the next three years. On August 31, 2006, the Trillium Chapter Board of Directors was led through its own strategic planning exercise in order to validate the national strategic plan and create an operational plan.

CSAE Trillium Chapter delivers its activities through four Board committees and two operational committees. They are:

- Communications
- Education
- Membership
- Special Events
- Sponsorship
- Voluntary Financial Review

While each of the committees has its own terms of reference and mandate, they all share the same goal which is to “promote the value of not-for-profit organizations to Canadian society by reinforcing and advancing the excellence and professionalism of its members through relevant education, advocacy, information and research.” [CSAE Mission Statement]

#### *2.4.1 CSAE Strategic Plan Objectives*

Trillium Chapter has identified the National Strategic Plan objectives referable to their own membership mandate. They include:

- Analyze member needs
- Identify trends affecting the sector
- Develop knowledge, products and services to meet the needs of sector leaders
- Increase member participation at Chapter and national events
- Encourage Executive and Business members to work together to ensure success
- Build a sense of pride in being a CSAE member
- Develop networking capabilities and resources to position CSAE as an organization that provides exceptional value
- Increase awareness with not-for-profit ED and their Boards to position CSAE as the premier source of leadership and information in the sector
- Identify at least two other Societies of Association Executives and/or similar organizations and establish relationships that emphasize reciprocal value, expertise sharing and new products and services. The intent is to deliver CSAE programs and services to their members to drive non-dues revenue to CSAE, while at the same time fulfilling the human dimension of working with organizations that need our expertise. [Canadian Society of Association Executives Strategic Plan May 1, 2006 to April 30, 2009]

### 2.4.2 CSAE Success Indicators

The Strategic Plan has identified success indicators that fall within the Trillium Chapter's mandate as they pertain to membership. They include:

- Determine member satisfaction with the relevance, quality, effectiveness and currency of CSAE's products, services and organization performance.  
(Measured by comparing 2006/2007 and 2007/2008 member satisfaction survey results in areas of importance to members)
- Grow membership from 2,250 to 2,350 as of April 30, 2007 with an emphasis on Executive recruitment
- New local service delivery model created and implemented where appropriate by June 2007
- Create a "resource bank" of qualified volunteers across the country by January 2007
- Volunteer satisfaction benchmarks established and measured yearly with the aim of seeing levels increase
- Membership increases within Executive category by 5% in the first year and then to 10% in years two and three
- Business membership increases by 5% per year
- Maintain Executive to Business member ratio of 70/30
- Membership retention rates increase yearly from 86% to 90% by 2008/2009 with a focus on first-year members
- Chapter and CSAE revenues increase by 5 - 10% per year due to strong programs and services that are effectively marketed
- Annually increase General Membership category by 20 – 30 members by focusing on students taking not-for-profit courses
- Member satisfaction levels increase every time the annual survey is conducted [ibid]

### **3.0 BENCHMARKING THE INTANGIBLE**

As a regional chapter of a national association, CSAE Trillium Chapter has ground level access to its members through professional development and social events. Trillium Chapter events are often the means by which members or prospective members discover the value of belonging. And since Trillium Chapter doesn't have its own roster of products and services like those delivered by CSAE National, it relies upon the delivery of intangible benefits such as networking to engage its members.

According to Pealow, best practices serve as minimum standards for high performance associations. [Pealow, Jim. *Benchmarking and Best Practices for Associations*, Canadian Society of Association Executives, 2003].

By adopting best practices for networking and member engagement, CSAE Trillium Chapter is confident that it will be able to enhance the value of membership, improve member retention and increase member recruitment.

#### **3.1 Planning and Organization Phase**

At a Trillium Chapter Board of Directors meeting held on September 19, 2006, it was announced that the Membership Committee was going to conduct a Benchmark Study that would measure networking for Chapter Members. Networking, or relationships with fellow association members, is often cited as being one of the most important reasons for belonging. [CSAE Trillium Chapter: Member Survey, Infofeedback Survey Services Inc., 2005] Within CSAE Trillium Chapter, networking is not just a benefit, it can also be considered a member program or service.

The benchmark study was timed to coincide with the strategic planning document that had been released by CSAE National and by the Chapter itself. More importantly, the study was going to establish a benchmark for measuring CSAE Trillium Chapter activities, particularly the ones that added networking value such as the education programs or the special events.

The benchmark study would also assist the Chapter in recognizing or validating best practices as well as identifying other opportunities that may have been missed or overlooked in the past including delivery of regional activities to support Chapter members outside the Greater Toronto Area.

For the purpose of the study, CSAE Trillium Chapter identified twenty comparative organizations including chapters of three national or international associations. All CSAE chapters across Canada were included in the prospect list.

The president or staff person of each Chapter was contacted and asked to participate in the study citing the purpose, the level of involvement and the length of time required to participate. [Appendix I] They were advised that scope of the benchmark study would be products, services or programs and since networking can be considered a member service, it would be measured for the purpose of the study.

### **3.2 Information Phase**

Of the twenty associations initially contacted, six agreed to participate. Upon confirmation of the benchmark partners, they were sent a link to an online survey and asked to complete the questionnaire by December 1, 2006. Ultimately, five chapter associations completed the survey.

Concurrently, the Trillium Chapter Board of Directors was also invited to participate in an online survey that asked them to assess themselves and the Chapter.

After the surveys were closed, data from the surveys was extracted and placed into Excel spreadsheets for the purpose of comparative analysis.

Each benchmarking partner was identified by a code name to protect their identities.

### **3.3 Analysis Phase**

Using a scale of one to five with five representing a high performance level and one representing a low performance level, Benchmark Partner scores were studied and averaged to determine rankings and for comparison to CSAE Trillium Chapter. [See Figure 1]

The performance gaps between the comparative associations (high scores) and Trillium Chapter (low scores) can be explained by a couple of assumptions:

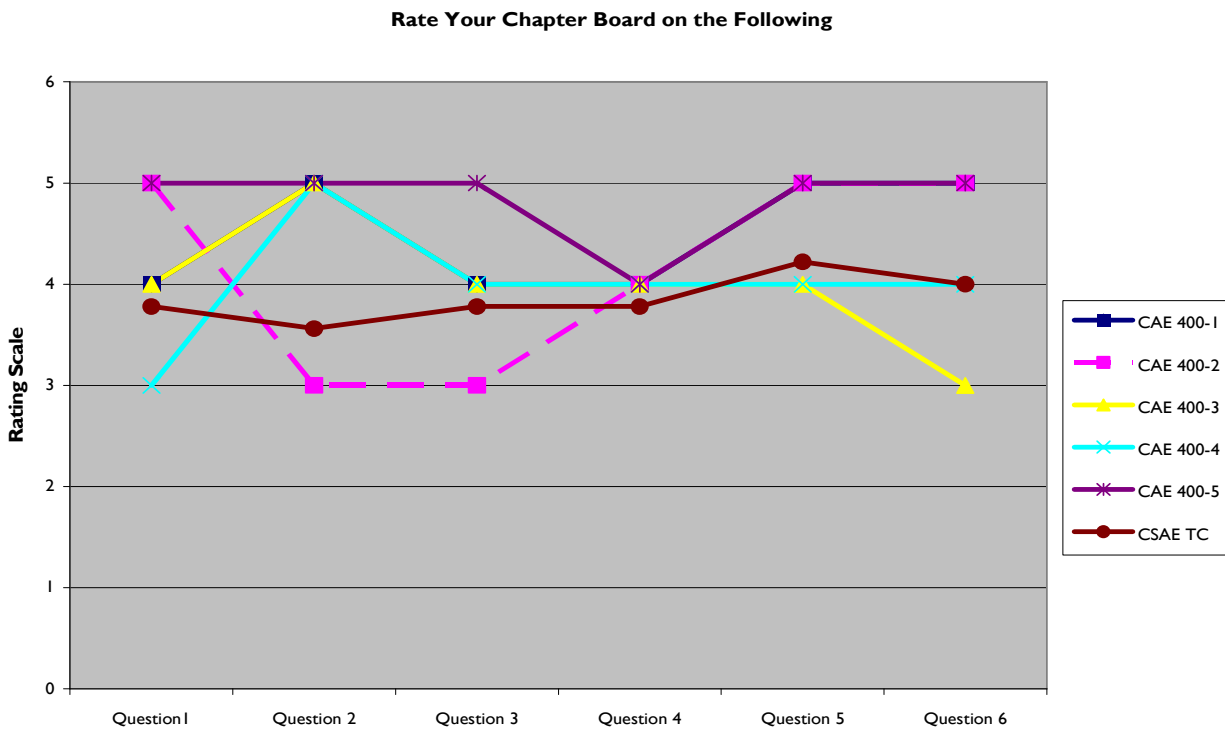
1. The benchmark partners each only had one person participate in the survey and therefore the responses were from the perspective of only one individual representing their respective organization. The Trillium Chapter response was an aggregate and average of nine responses by members of the Trillium Chapter Board of Directors. Had only one person from Trillium Chapter responded, the scores might have been substantially different.
2. Trillium Chapter has not only undergone board and committee restructuring in recent years, it has also gone through a major transition with a change in association management companies. The end result has been unhappy members displeased with the new structure or delivery model, burned out volunteers and inconsistent service. The scores reflected the current perspective of members. With a new association management company in place and the winds of positive change blowing strong, there is no doubt that volunteers will become reenergized, service will improve and member engagement will be strengthened.

**FIGURE I – BENCHMARKING PARTNER PROFILE**

		CSAE Trillium Chapter	Partner Profile A CAE 400-1	Partner Profile B CAE 400-2	Partner Profile C CAE 400-3	Partner Profile D CAE 400-4	Partner Profile E CAE 400-5
<b>VARIABLE</b>	<b>MEASURE</b>						
<b>Size of Association</b>	Number of Members	818	70	260	450	53	460
	Membership Categories	Executive Business	Executive Business	Corporate Association 3 <sup>rd</sup> Party/Independent	Professional Student	Corporate Association 3 <sup>rd</sup> Party/Independent	Executive Business
	In the past 5 years membership has...	Decreased	Stayed the same	Increased	Increased	Increased	Increased
	In the past years membership has...	Decreased	Stayed the same	Increased	Increased	Increased	Stayed the same
	Your membership represents what percentage of the national or international association's total?	38%	10%	10%	10%	10%	21 – 30%
<b>Age of Association</b>	In what year was your association established?	1951	1951	1972	1970	1972	1951
	In what year was your association established?	<b>1962</b>	<b>Do not know</b>	<b>1984</b>	<b>1985</b>	<b>1991</b>	1960
<b>Management of Association</b>	Does your chapter use an AMC?	Yes	Yes	Yes	Yes	No	Yes
Association Committees	In addition to your Board of Directors, indicate which committees oversee your chapter's activities	Education Membership Communications Special Events Sponsorship Finance	Membership Events	Membership Events Education Finance Marketing Sponsorship Community Outreach Publications Awards Scholarship	Board oversees 14 portfolios	Education Membership Finance Sponsorship	Education Membership Events Marketing Programs
<b>Averages for All Sections</b>		<b>3.0</b>	<b>3.4</b>	<b>3.6</b>	<b>3.4</b>	<b>3.1</b>	<b>3.1</b>
<b>Rank</b>		<b>SIXTH</b>	<b>THIRD</b>	<b>FIRST</b>	<b>SECOND</b>	<b>FIFTH</b>	<b>FOURTH</b>

**FIGURE 2. RATE YOUR CHAPTER BOARD ON THE FOLLOWING:**

		<b>Average Score</b>
<b>Q1</b>	The board encourages discussion between committees and committee chairs to avoid duplication and to encourage seamless planning	<b>4.2</b>
<b>Q2</b>	The board uses data, whether gathered from member surveys or mined from membership databases, for planning and decision-making.	<b>4.6</b>
<b>Q3</b>	The board is innovative and is open to new ideas particularly in the face of challenges and change	<b>4</b>
<b>Q4</b>	The board is customer-focused and attuned to the needs of the members.	<b>4</b>
<b>Q5</b>	The board supports the mandate of the national/international association.	<b>4.6</b>
<b>Q6</b>	The board communicates with the national/international association and keeps them informed of chapter initiatives and activities.	<b>4.4</b>

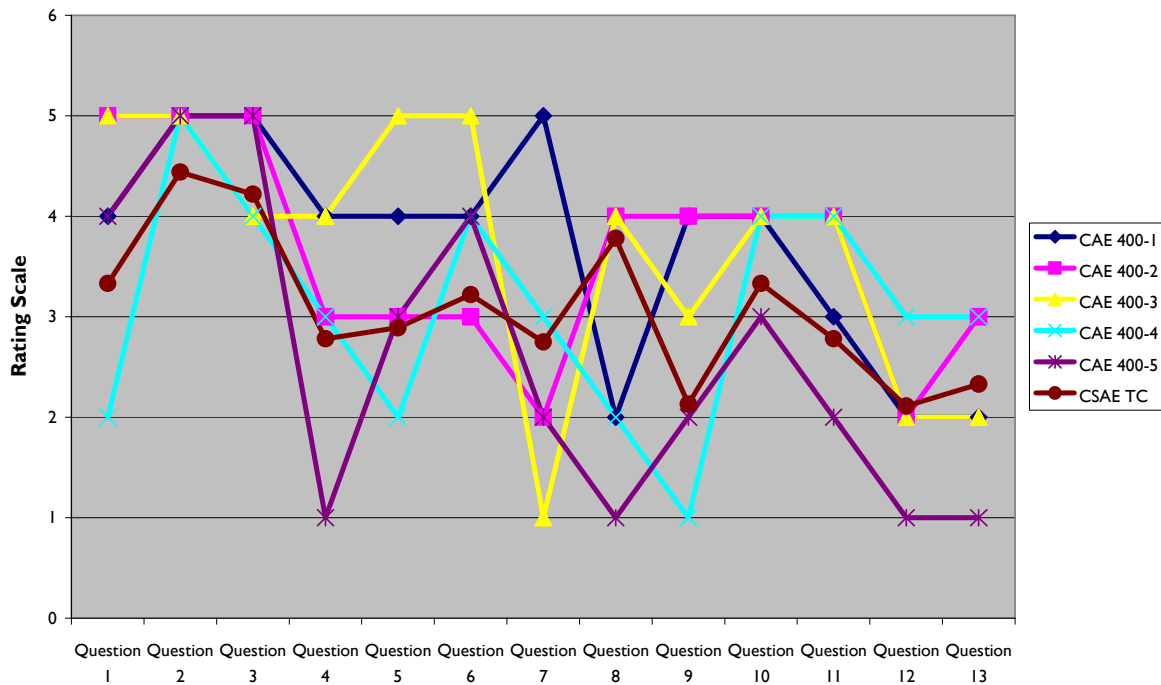


<b>OVERALL AVERAGE SCORE:</b>	<b>4.3</b>
<b>HIGH SCORE:</b>	<b>4.5 (CAE 400-1)</b>
<b>LOW SCORE:</b>	<b>3.9</b>
<b>CSAE TRILLIUM CHAPTER AVERAGE SCORE:</b>	<b>3.9</b>

**FIGURE 3. RATE YOUR CHAPTER ON THE FOLLOWING:**

	<b>Average Score</b>
<b>Q1</b> The chapter conducts regular member surveys to better understand member needs and/or opinions about events, programs, services and products.	<b>4</b>
<b>Q2</b> The chapter regularly communicates to its member via newsletters and e-blasts.	<b>5</b>
<b>Q3</b> The chapter provides meaningful networking opportunities for its members and prospective members.	<b>4.6</b>
<b>Q4</b> The chapter has a system to connect prospective and new members with existing members	<b>3</b>
<b>Q5</b> The chapter calls new members to welcome them and invite them to upcoming events.	<b>3.4</b>
<b>Q6</b> The chapter makes new and prospective members feel welcome at events.	<b>4</b>
<b>Q7</b> The chapter recognizes new members through its newsletters or on the website.	<b>2.6</b>
<b>Q8</b> The chapter provides orientation for new members.	<b>2.6</b>
<b>Q9</b> The chapter contacts cancelled members for an exit interview.	<b>2.8</b>
<b>Q10</b> The chapter reinforces membership value not just at renewal time but throughout the year.	<b>3.8</b>
<b>Q11</b> The chapter helps members to discover the personal and social payoffs of joining	<b>3.4</b>
<b>Q12</b> The chapter acknowledges geographical challenges and provides virtual communities to connect members.	<b>2</b>
<b>Q13</b> The chapter offers the personal touch while building and strengthening virtual communities	<b>2.2</b>

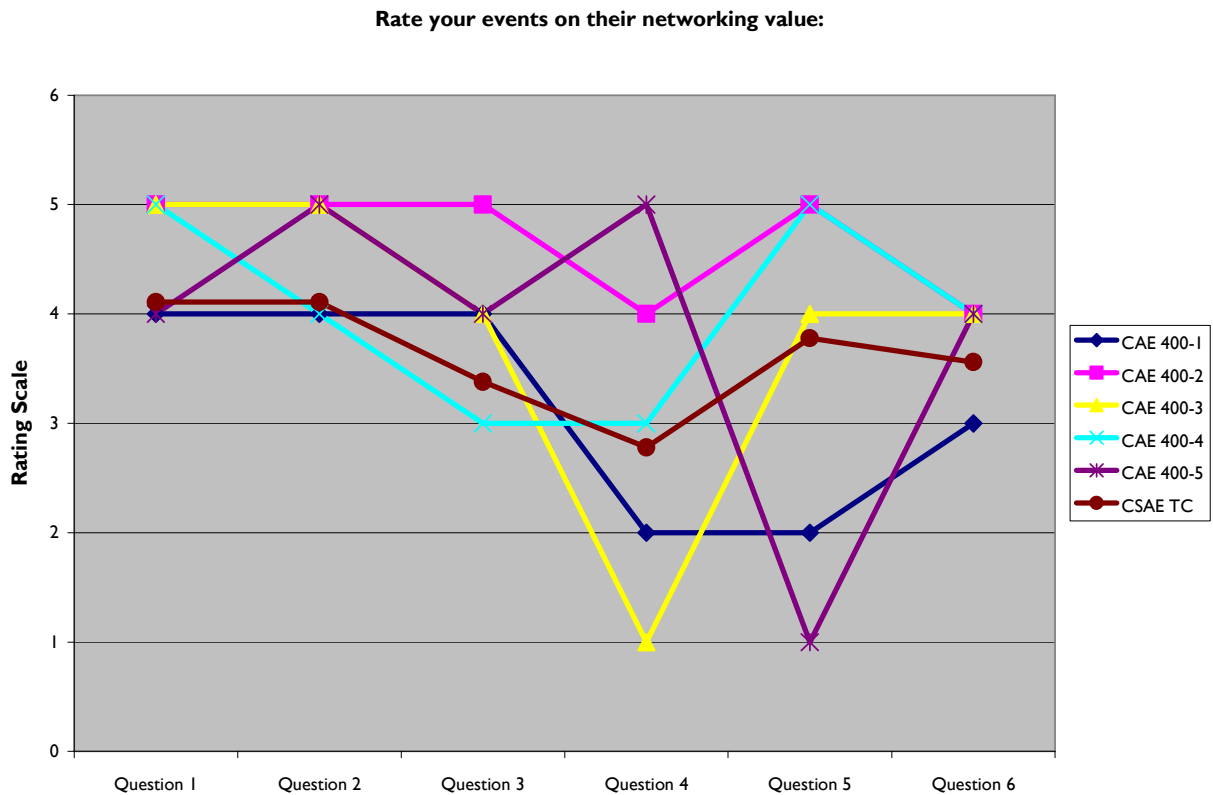
**Rate your chapter on the following:**



**OVERALL AVERAGE SCORE:** 3.3  
**HIGH SCORE:** 3.7 (CAE 400-1 AND CAE 400-3)  
**LOW SCORE:** 2.6 (CAE 400-5)  
**CSAE TRILLIUM CHAPTER AVERAGE SCORE:** 3.1

**FIGURE 4. RATE YOUR EVENTS ON THEIR NETWORKING VALUE:**

	<b>Average Score</b>
<b>Q1</b> Professional Development Events	<b>4.6</b>
<b>Q2</b> Social Events	<b>4.6</b>
<b>Q3</b> Business Round Tables	<b>4</b>
<b>Q4</b> Trade Shows/Table Top Events	<b>3</b>
<b>Q5</b> Conferences	<b>3.4</b>
<b>Q6</b> Annual General Meetings	<b>3.8</b>



OVERALL AVERAGE SCORE:	3.9
HIGH SCORE:	4.7 (CAE 400-2)
LOW SCORE:	3.2 (CAE 400-5)
CSAE TRILLIUM CHAPTER AVERAGE SCORE:	3.6

### 3.4 GAP ANALYSIS

#### 3.4.1 RATE YOUR CHAPTER BOARD ON THE FOLLOWING:

		<b>Average Score</b>	<b>CSAE vs. Average</b>	<b>400-2 vs. Average</b>	<b>CSAE vs. 400-2</b>
<b>Q1</b>	The board encourages discussion between committees and committee chairs to avoid duplication and to encourage seamless planning	<b>4.2</b>	<b>3.8</b> ↓	<b>5</b> ↑	<b>-1.2</b>
<b>Q2</b>	The board uses data, whether gathered from member surveys or mined from membership databases, for planning and decision-making.	<b>4.6</b>	<b>3.6</b> ↓	<b>3</b> ↓	<b>+1.6</b>
<b>Q3</b>	The board is innovative and is open to new ideas particularly in the face of challenges and change	<b>4</b>	<b>3.8</b> ↓	<b>3</b> ↓	<b>+1.8</b>
<b>Q4</b>	The board is customer-focused and attuned to the needs of the members.	<b>4</b>	<b>3.8</b> ↓	<b>4</b> =	<b>-.2</b>
<b>Q5</b>	The board supports the mandate of the national/international association.	<b>4.6</b>	<b>4.2</b> ↓	<b>5</b> ↑	<b>-.8</b>
<b>Q6</b>	The board communicates with the national/international association and keeps them informed of chapter initiatives and activities.	<b>4.4</b>	<b>4.0</b> ↓	<b>5</b> ↑	<b>-1.0</b>

The CSAE Trillium Chapter Board was scored based on the current situation which reflects two years of restructuring and the transition to a new association management company. While the scores are not as high as the average or as the top-scoring CAE 400-2, they are still respectable and leave sufficient room for improvement.

#### *#1 Recommendation to overcome gaps:*

The Board and its committees should encourage a culture of information sharing whereby all staff, directors and committee volunteers receive or have access to the same consistent information, whether it is member feedback, direction from CSAE National or committee work plans. This information should be shared and dialogue encouraged. Silos, especially those created by committees, must be demolished to reduce fragmentation.

Committees should share their minutes, work plans and schedules with each other and CSAE National to encourage open dialogue, innovative ideas and integration of the Chapter “brand” with National strategies and directions.

### 3.4.2 RATE YOUR CHAPTER ON THE FOLLOWING:

		<b>Average Score</b>	<b>CSAE vs. Average</b>	<b>400-2 vs. Average</b>	<b>CSAE vs. 400-2</b>
<b>Q1</b>	The chapter conducts regular member surveys to better understand member needs and/or opinions about events, programs, services and products.	4.0	3.3↓	5.0↑	-1.7
<b>Q2</b>	The chapter regularly communicates to its member via newsletters and e-blasts.	5.0	4.4↓	5.0↑	-.6
<b>Q3</b>	The chapter provides meaningful networking opportunities for its members and prospective members.	4.6	4.2↓	5.0↑	-.8
<b>Q4</b>	The chapter has a system to connect prospective and new members with existing members	3.0	2.8↓	3.0=	-.2
<b>Q5</b>	The chapter calls new members to welcome them and invite them to upcoming events.	3.4	2.9↓	3.0↓	-.1
<b>Q6</b>	The chapter makes new and prospective members feel welcome at events.	4.0	3.2↓	3.0↓	+2
<b>Q7</b>	The chapter recognizes new members through its newsletters or on the website.	2.6	2.8↑	2.0↓	+8
<b>Q8</b>	The chapter provides orientation for new members.	2.6	3.8↑	4.0↑	-.2
<b>Q9</b>	The chapter contacts cancelled members for an exit interview.	2.8	2.1↓	4.0↑	-1.9
<b>Q10</b>	The chapter reinforces membership value not just at renewal time but throughout the year.	3.8	3.3↓	4.0↑	-.7
<b>Q11</b>	The chapter helps members to discover the personal and social payoffs of joining	3.4	2.8↓	4.0↑	-1.2
<b>Q12</b>	The chapter acknowledges geographical challenges and provides virtual communities to connect members.	2.0	2.1↑	2.0=	+1
<b>Q13</b>	The chapter offers the personal touch while building and strengthening virtual communities	2.2	2.3↑	3.0↑	-.7

The CSAE Trillium Chapter Board tries very hard to be member-focused and encourages all committee members to make contact with members through regular communications, at events and via phone. Clearly, however, there is still much to be done to connect with members, particularly those outside the Greater Toronto Region. Challenges still exist for the Chapter engaging with members who are geographically dispersed throughout the province. Networking opportunities for these members is limited and it is not uncommon for these members to feel isolated or disenfranchised from their professional association

*Recommendation to overcome gaps:*

CSAE Trillium Chapter needs to move away from being Toronto-centric and come to grips with the Chapter's geographic diversity. This means making Chapter professional development and social events accessible to all members including those not currently serviced through professional development and social events. The Chapter needs to remind itself that it is here to serve its members and should convert lip service into action.

Being member focused may mean embracing the technologies that enable an organization like Trillium Chapter to create virtual communities including list serves and discussion boards. Since these technologies are already currently in use by CSAE or have been used in the past, the Trillium Chapter Board must encourage CSAE National to introduce virtual communities to the membership mix so that members in the farther reaches of the province can become as engaged as those member in the GTA.

Finally, the Chapter should encourage networking activities at all events whether they are educational or social. Association members have a need to connect with other members. The Chapter should make networking a regular component of all Chapter Activities.

### 3.4.3 RATE YOUR EVENTS ON THEIR NETWORKING VALUE:

	<b>Average Score</b>	<b>CSAE vs. Average</b>	<b>400-2 vs. Average</b>	<b>CSAE vs. 400-2</b>
<b>Q1</b> Professional Development Events	4.6	4.1↓	5.0↑	<b>-0.9</b>
<b>Q2</b> Social Events	4.6	4.1↓	5.0↑	<b>-0.9</b>
<b>Q3</b> Business Round Tables	4	3.4↓	5.0↑	<b>-1.6</b>
<b>Q4</b> Trade Shows/Table Top Events	3	2.8↓	4.0↑	<b>-1.2</b>
<b>Q5</b> Conferences	3.4	3.8↑	5.0↑	<b>-1.2</b>
<b>Q6</b> Annual General Meetings	3.8	3.6↓	4.0↑	<b>-0.4</b>

Despite CSAE Trillium Chapter's seemingly low rating of their events, networking value has in fact improved dramatically over the past year. This is primarily because staff and volunteers

have deliberately and strategically orchestrated activities that encourage interaction, dialogue and sharing of information. This rating will no doubt improve over the next year.

*Recommendation to overcome gaps:*

The Chapter should continue to encourage activities that promote networking including matching seasoned members with new or prospective members, contacting new members to welcome them, instructing members on effective networking and new member orientation. All events should be structured with networking as a main component. The cost to the Chapter is minimal. The benefits to the membership are invaluable.

#### 4.0 CHAPTER TACTICAL AND OPERATIONAL PLAN

<b>RECOMMENDATION #1 – CULTURE OF INFORMATION SHARING</b>	
<b><i>Strategic</i></b>	<b><i>Tactical/Operational</i></b>
Encourage a culture of information sharing. Eliminate silos. Encourage open dialogue, innovative ideas and integration of the Chapter “brand” with National strategies and directions.	Ensure that staff, directors and committee volunteers receive or have access to the same consistent information.  Circulate committee work plans, minutes and other documentation.  Conduct member survey and collect member feedback.  Interact with CSAE National.
<b>Budget Implications</b> <ul style="list-style-type: none"> <li>- Costs to conduct surveys</li> </ul>	
<b>Operational Implications</b> <ul style="list-style-type: none"> <li>- More interaction with CSAE National</li> <li>- More interaction between Trillium Chapter staff, directors and volunteers</li> <li>- More paper and e-mail</li> </ul>	

<b>RECOMMENDATION #2 – MEMBER-FOCUSED</b>	
<b>Strategic</b>	<b>Tactical/Operational</b>
<p>Move away from Toronto-centric events and acknowledge geographic diversity.</p> <p>Become more member focused.</p> <p>Create virtual communities.</p>	<p>Create a “road show” program for members outside of the GTA</p> <p>Embrace technologies to support virtual communities including list serves and discussion boards.</p>
<p>Budget Implications</p> <ul style="list-style-type: none"> <li>- Costs to extend events into other regions (potential cost recovery)</li> <li>- Costs to launch discussion boards or list serves</li> </ul>	
<p>Operational Implications</p> <ul style="list-style-type: none"> <li>- Additional events</li> <li>- Event logistics outside of Toronto</li> <li>- Technological challenges and learning curves</li> <li>- More interaction between Trillium Chapter volunteers and new members</li> </ul>	

<b>RECOMMENDATION #3 – NETWORKING VALUE</b>	
<b>Strategic</b>	<b>Tactical/Operational</b>
<p>Promote and encourage networking.</p>	<p>Contact new members to make them feel welcome.</p> <p>Instruct members on how to effectively network.</p> <p>Encourage networking activities including “buddy system” at all CSAE Trillium events.</p> <p>Identify non-members on badges.</p>
<p>Budget Implications</p> <ul style="list-style-type: none"> <li>- None</li> </ul>	
<p>Operational Implications</p> <ul style="list-style-type: none"> <li>- More interaction between Trillium Chapter volunteers and new members</li> <li>- Additional work to match seasoned member with new member</li> <li>- Additional work to mark badges</li> <li>- Additional staff and volunteer time to come up with networking ideas</li> </ul>	

## 5.0 CONCLUSION

Over the past two years, CSAE Trillium Chapter has demonstrated tremendous resiliency in the face of overwhelming odds.

Dwindling memberships combined with significant operational challenges have tested the mettle of the volunteer leaders and has forced the Chapter to look inward for answers.

By facing the brutal facts and determining the truth of its situation, good decisions are being made. Additionally, the Chapter has been successful in recruiting committed and engaged volunteers ensuring that the right people are on the bus.

As long as Trillium Chapter creates a customer service culture that acknowledges the members and tries to understand their needs, the Chapter will continue to thrive and grow.

As long as Trillium Chapter continues to gather and analyze data gathered from member surveys and feedback and from the wider environment, it will continue to be relevant.

As long as Trillium Chapter continues to disseminate the information it gathers to its volunteers and to its staff and encourages a close knit community that doesn't include silos, great ideas will continue to flourish.

CSAE Trillium Chapter has the potential to learn from its mistakes and overcome the adversity of recent years. By acknowledging its shortcomings, by truly paying attention to what members have to say, and by ensuring that the right people have the right information, the Chapter will have a breakthrough year in 2007.

## 6.0 BIBLIOGRAPHY

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## APPENDIX I

### Benchmarking Partner Invitation

**From:** Constance Wrigley-Thomas [mailto:constance@essentient.ca]  
**Sent:** Monday, November 13, 2006 3:11 PM  
**To:** 'constance@essentient.ca'  
**Subject:** Canadian Society of Association Executives Trillium Chapter Benchmark Study

Good afternoon Constance,

I am a member of the Canadian Society of Association Executives Trillium Chapter Board of Directors and Chair of its Membership Committee. I also happen to be a candidate for the Certified Association Executive (CAE) designation and am conducting a benchmark study for Trillium Chapter as part of my course requirements. The Trillium Chapter Board has given me permission to proceed ahead with this project. Trillium Chapter plans on using this document as the basis for continuous improvement.

I am contacting chapters of national or international associations to participate as a benchmark partner. The scope of the benchmark study will be products, services or programs. Since **networking** can be considered a member service, that is what I will be measuring for the purpose of this study. I hope to have approximately 20 association chapters participating in the study. Participation will be done anonymously as all participants will be de-identified for the purpose of the study. Additionally, all information provided for the purpose of this study will be kept confidential. Only I or my instructor will know which organizations participated.

All benchmark partners will also be entitled to receive a copy of the final document to see how they measure up against similar organizations and will gain insights into how the “best in class” organizations achieve a high level of success. Those organizations that are deemed to be best in class will be contacted further to obtain more information about how they are able to attain a high level of member engagement.

Participation in this study will be conducted through an online survey. I plan on launching the survey to all participants next Monday. The survey won't take any more than 5 minutes to complete.

The benchmark study must be completed by December 4<sup>th</sup>. The final document will be released to all participants on or around December 15<sup>th</sup>.

If CSAE Trillium Chapter is interested in participating, please let me know by Friday, November 17<sup>th</sup>.

If you are curious as to what a benchmark study might look like, here is a link to an earlier study that I prepared back in 2003:

<http://www.essentient.ca/Wrigley-Thomas%20AME%20200-2.pdf>

Thank you and best regards,

Constance Wrigley-Thomas  
Essentient Association Management  
Tel: 905-331-9668  
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Constance Wrigley-Thomas  
CAE 400-2  
December 4, 2006

E-mail: [constance@essentient.ca](mailto:constance@essentient.ca)

Website: [www.essentient.ca](http://www.essentient.ca)

## **APPENDIX II**

Survey to Benchmark Partners: <http://www.surveymonkey.com/s.asp?u=909782934357>

## **APPENDIX III**

Survey to Trillium Chapter Board: <http://www.surveymonkey.com/s.asp?u=339502945413>