

CEX Virtual

Equipping Your Chapter Leaders &
Volunteers for 2020



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Thanks for coming!



Introduction

billhighwaySM



In 2019, Billhighway and Mariner Management & Marketing came together to host the 3rd annual [CEX: Association Component Exchange](#) for component relations professionals (CRPs). During that event, we asked...What is the role of chapters? Are chapters still relevant? What changes are associations making to chapters? What support and services should we be giving chapters? How do we evaluate our chapters? How do we effectively share information with all chapters? This virtual event welcomed professionals who work with, manage, or nurture chapter leaders or volunteers to discuss the answers to those questions. Together, the speakers and attendees explored the successes, struggles, strategies, and innovations they've seen in chapters during 2019 and their vision for 2020.

How The eBook Was Made

This whitepaper was assembled by volunteers from the component relations community in collaboration with the [Matchbox Virtual Media](#) team. They strategically aimed to pinpoint crucial thoughts and ideas that bubbled up during the virtual event, through the speakers' conversations, the attendee chat, the popup questions, and post-event conversation with motivated CRP community volunteers. Additionally, they researched resources related to themes discussed and scattered them throughout the eBook! These resources sometimes appear as hyperlinks within a quote, or as dedicated short lists. The takeaways in this eBook aim to demonstrate the event's essential themes, ideas, and general output for anyone that is interested!

Tip: Did you miss [CEX Virtual](#)? We suggest watching it now before continuing on to the rest of this eBook. We promise it will be more valuable if you do!

“ Woohoo! What a fantastic session!! ”

Thanks To Our Partners!

A huge thank you to all of our partners who helped make this virtual co-creation event possible!



About [CEX: Association Component Exchange](#)

It's no secret that there's currently a gap in education for associations that operate in a component model. So Billhighway and Mariner Management came together to build a community and connect component-based organizations and component relations professionals (CRPs). This manifested itself in CEX. CEX is a learning community where you get together with peers to share your successes, struggles, strategies, tactics, ideas, and insights.



About [Billhighway](#)

Got Chapters? Billhighway gives component-based associations the tools to automate and simplify operations while creating data visibility across your entire organization. This empowers you and your chapters to focus more on member value and grow your association.



About [Mariner Management & Marketing](#)

Association components are an important part of your association's strategy to move the mission and meet members' needs. Tap Mariner for leadership development, creating engaging leadership resources and communities, optimizing your association resources and staff, or reimagining your component structure and strategy. We are a mentor, friend, and connection for association staff and volunteers.



About [Matchbox Virtual Media](#)

Matchbox creates virtual events that drive conversations that matter and foster connections that last. Matchbox designs and executes virtual events leveraging the knowledge and experience of members to build collaborative networks. Matchbox will help your association increase engagement, improve the effectiveness of education, and help you find the best path to new solutions.

Conversation Starters

The attendees' conversations were set in motion by the following component relations professional (CRP) speakers who generously gave us their time, thoughts, and themes of the discussion. Thank you!



Diana Tucker, CAE

Vice President for Membership and Chapter Relations
NAIOP



Wesley Carr

Director of Stakeholder Engagement
Regulatory Affairs Professionals Society (RAPS)



Nabil El-Ghoroury, PhD, CAE

Executive Director
California Association of Marriage and Family Therapists (CAMFT)



Peggy Hoffman, FASAE, CAE

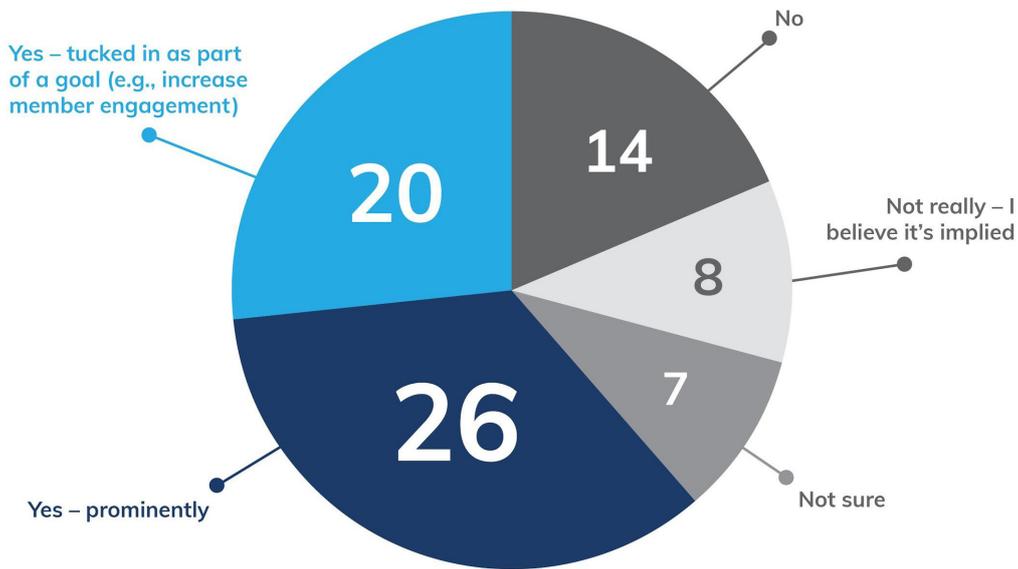
Co-Founder & President
Mariner Management

“ Great Job Everyone! GREAT Information! ”

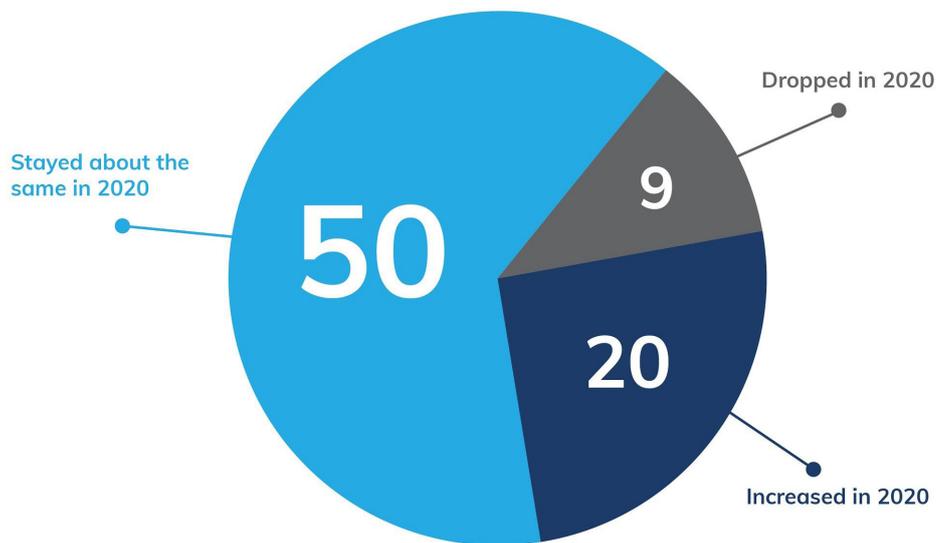
Event Insights and Takeaways

During the live event, multiple choice pop-up questions appeared for all participants to engage with! The following visual representations provide a snapshot of CEX Virtual's attendees' situations.

Poll Answers from CEX Virtual Are chapters in your organization's strategic plan?



Poll Answers from CEX Virtual Have your budget and resources for managing and supporting chapters...



Contributions From the Speakers' Discussion

The following pages consist of elements drawn from the transcripts of the speakers' recording. Although a team of volunteers carefully sifted through the transcripts to identify the little gems worth sharing, they only represent a small portion of the speaker's full discussion! To appreciate the entire discussion, we invite you to watch the session on demand through registering at the [CEX Virtual Event Page](#), or to [read the transcript, if that's preferred](#).

Thought-Provoking Questions

Innovation, change, and solutions that move obstacles begin with thought provoking questions that get your gears turning. They help you learn something new and gain fresh perspectives. Here are some questions that our speakers asked to spark their journeys.

How do you support chapters in [attracting younger members](#) and then draw them into leadership?

How do you aid chapters in creating [successful leadership transitions](#)?

How do you convince management that [professional development](#) for volunteers must be in the budget every year? In fact, how do you get extra dollars when you need them?

How do we help chapters embrace their volunteers, or [new volunteering concepts](#)?

How do we get the chapter leaders to pay attention to our communications? Are you already noticing what they do listen to? Do you have some sense of what some of the triggers are that assure you do get people to listen?

Do we need chapters for the smaller communities and what opportunities do we have?

What is the most amazing or surprising thing you saw at your chapters last year that's going to be fuel for 2020?

Event volunteers have recommended the following articles to compliment the theme of attracting younger chapter members:

- [How NAIOP Launched a Chapter Mentoring Program to Engage Members](#)
- [Wow Your Chapters with These Member Recruitment Resources](#)
- [Wanted by Chapters Everywhere: Member Recruitment Training](#)

Insights and Words of Wisdom

Our four panelists have years of experience working with components, and [their discussion](#) at [CEX Virtual](#) served as inspiration and guidance to many event participants. The following insights and words of wisdom are bite-sized food for thought to help evaluate your programs, support your strategies, and possibly transform your thinking.



“We’re now doing a lot of training for the chapter leaders on [how to do succession planning](#) and leadership in the constant recruitment era because it’s not a one time thing. It’s really, you have to see who’s engaged, who’s coming to your events routinely and suggest to them, “Hey, do you want to volunteer for this?” Leverage the [microvolunteering](#) strategies and then engage them more so that they want to continue in leadership.”



“One of the things that we’ve moved towards is actually hosting a chapter leadership or volunteer leadership summit every year where we bring selected chapter leaders to our office or to a hotel. We have them for two full days. We focus day one on presentations from staff, upcoming initiatives ... trying to pull together a plan from the chapter level as well as from headquarters level to align those things.”



“Part of what we moved to is a strategy where we actually invest in our chapters. It’s not always about what they bring to the table for headquarters, but it’s what we can do for them. Bringing them in, showing them, “You’re important to us. You’re a part of our annual planning. We want to hear from you.””



“What happens is some of the younger leaders that had started with [small tasks](#) at the local level are starting to move into those leadership roles at the chapter level. It’s kind of one of those things, I think for every step you take towards your volunteers, you’ll often see two steps in response.”



“The other part honestly is the board leaders are coming from chapters, so they want to support their growth areas. I’m really excited about this [opportunity to invest in chapters](#), for the long haul, for sustainability. I want to create a system that can sustain itself.”



“I love that notion of let’s tie it to what is real sustainability, which is what is a real goal?”

Event volunteers have recommended the following articles to compliment the themes of leadership planning & volunteer development:

- [How To Build A Chapter Leadership Pipeline](#)
- [Powering Up Your Chapter Leaders Succession Planning](#)
- [Chapters In Crisis: Handling & Preventing Chapter Leader Succession Issues](#)
- [4 Associations Experiment With Volunteer & Chapter Leader Training Programs](#)
- [Chapter Succession Planning: Engage Your Volunteer Community](#)
- [NIGP's New, Holistic Approach to Leadership Development](#)

Resources

Our panelists shared a variety of resources that were complimented by volunteers' research. Explore these resources below and remember you can always check out the full transcript from the speaker discussion [here](#), or watch the session on demand through [the CEX Virtual Event Page](#)!



“We have something called the Member Knowledge Center where we put free content. You can explore our [Member Knowledge Center here](#).”



“Last year we tested a new chapter program with a handful of chapters. It’s a version of [speed mentoring](#). We have senior members who are professionals that are paired with junior professionals. They get three minutes to just engage with one another and ask questions following the ground rules: you can’t ask about a job, but you can ask about career decisions. You have three minutes to talk, a buzzer goes off, everybody gets up and then shifts. The idea is all the junior professionals get to engage with the senior professionals. Afterwards there’s food and networking. Then you can connect and continue those conversations. Those have been really successful. I’m excited to try to do more of those in 2020.”

Interested in learning about microvolunteering? Here are some more articles to support your efforts!

- [You Say Ad Hoc, I Say Micro](#)
- [The List: Micro & Ad hoc Volunteer Jobs in Associations](#)
- [Micro-adhocracy: Macro-engagement](#)
- [Walking The Walk Of Deep Volunteer Engagement](#)
- [5 Ways To Keep Your Volunteer Pipeline Full](#)
- [8 Solutions To Attract Chapter Volunteers To Participate](#)
- [It Doesn't Take A Miracle To Attract & Retain Chapter Volunteers](#)
- [5 Truths to Leverage to Build Volunteerism](#)

“ Thank you for all the ideas and experiences that got us to think and how to apply in our own associations! ”

Contributions from the Attendee Chat

As the pre-recorded session played, an attendee chat allowed all stakeholders to interact and develop the conversation in whatever organic direction it took. The full chat transcript can be found [here](#), but we invite you to enjoy the selected questions, comments, stories, ideas and resources shared below.

Thought-Provoking Insights

The attendee chat welcomed contributions from all attendees with access to a keyboard! This diversity of perspectives made for some curious conversation, and we welcome you to feed your curiosity and use the following thought-provoking insights to ignite conversations in your association.



“One of the indicators we look at is the level of conversion of Developing Leaders to regular members (at higher dues!) after they age out of DLs.”



“It’s neat how some people are looking at attendance ratio to balance large and small chapters. We need metrics that aren’t about size but about outcomes!”



“We also started doing “Town Hall” webinars where our CEO shares association news, info, projects with chapter leaders only.”



“We are rolling the program out in phases--compiling basic component demographics to ensure our information is correct, holding a roundtable meeting at [our annual conference](#) to discuss concerns and needs, developing a larger needs assessment based on the initial roundtable discussion, enhancing support services from HQ based on the results of the survey, providing a compliance “kit” with a checklist and templates needed for annual reporting and legal compliance, and finally developing a leadership development program. Will take 18-24 months to fully roll out.”



“Our student members were also not interested in Snapchat! I would recommend polling your members to see where they’re “hanging out”.”



“We post on social 4 times per week, at minimum. Our most popular “regular” post is Motivation Mondays where we give students a little motivation to get through the stressful week ahead. We also do #NSSLHAs shoutouts on Fridays, where I mine through our chapters Instagram posts and share any “fun” activities/posts they did that week. It’s gained a lot of traction - they LOVE seeing themselves reposted on the national account!”



“Interesting concept. How do you foster community and tie back to the national organization in an unstructured environment? I do think this is the wave of the future.”

Event volunteers have recommended the following articles to compliment the discussion around chapter leadership conferences and training:

- [How to Train, Support & Inspire at Your Chapter Leader Conference](#)
- [Chapter Leadership Conference: The Catalyst for Chapter Success](#)
- [Chapter Leader Training Provided by Headquarters](#)



“I was talking with an association and they didn’t see a connection to chapter activities and retention until they began looking at event attendance. Attendance at chapter event correlated to retention.”



“It would be interesting to hear more stories of associations that moved from the traditional, chartered chapters to these less structured groups. I’m all for it in some respects but also worry about potential liabilities/actions of that group.”

In reply: “Good point! We’re also considering having a “chapter chartering” cycle. we currently process as they come. I like the idea of having a prerequisite to being chartered - but there’s certainly a bit of liability there.”

In reply: “Yes you need to consider those options around risk & liabilities. But I always go back to the stories about chapters who lose their incorporation due to not filing or are incorporated and still suffer embezzlement.”



“I’ve also seen where a request was made to provide a listing of meetings, # of members vs # of members recruited, and the amount of \$\$ raised from sponsorships as metrics.”



“Very true, yet for many associations it’s difficult for them to [cut loose those chapters](#) that are underperforming or not performing at all.”



“We have this problem. Our regional VPs need to say ‘it’s time to close this chapter’ but they don’t. I think it’s because they see it as a failure. But we’d rather have vibrant chapters than barely there chapters.”

In reply: “We have kept chapters alive where there are 70 members but only 20-25 at each meeting. I feel like the ones that don’t show but still keep membership must get some benefit.”



“Yes! That is why I think we really need to shift our metrics and not focus so much on butts in seats.”



“Our active chapters are amazing member [engagement incubators](#). They identify resources/speakers that we might not otherwise have known about.”

Event volunteers have recommended the following articles to compliment the themes of ROI and proving your chapters’ worth:

- [Chapters– A Defensible ROI?](#)
- [How one association proved their Chapter ROI - Mariner Marketing & Management, LLC](#)
- [Chapters– Are they worth the cost?](#)
- [When Is It Time to Close a Chapter?](#)
- [How 3 Associations Collect & Use Chapter Data](#)

Words of Wisdom

During [CEX Virtual](#), participants in [the attendee chat](#) shared advice and perspectives on shared and relatable experiences. Whether you were present at the live event, or are catching up on the conversations now, we encourage you to reflect on your own programs inspired by words of wisdom from the attendees.



“We found it is easy to get people to engage if we give them a space to complain about software. Then we provided value by connecting them so they can amplify their voice to get the software fixed.”



“In my prior association we had small groups meet informally. The issue was that for many people it was their first introduction to the association. If the group didn't do much, then it didn't reflect well on the association.”



“We also started doing “Town Hall” webinars where our CEO shares association news, info, projects with chapter leaders only.”



“We have a 3 phase formation process which includes the creation of a business plan prior to allowing a chapter to incorporate locally and/or charter with the parent organization.”



“We have an annual reporting process asking all metrics, how they function, etc - only about 50% of chapters actually submit. Trying to figure out a way to have “compliance” being expected from my senior leadership but also have realistic expectations of what we're asking our chapter leaders to report.”



“We found it is easy to get people to engage if we give them a space to complain about software. Then we provided value by connecting them so they can amplify their voice to get the software fixed.”



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“We have 247 chapters worldwide and we have undertaken a [chapter assessment](#) project where each chapter chair/leader is contacted to participate in either a group session or individual session to discuss their chapter needs, wants, pain points, etc. We then make an assessment of that chapter and create action plans depending on their assessment “score.””



“We had a dying component that resurrected itself. I received a call from the President who said he's secured speakers for a day-long seminar but had no idea what to do next. I worked with him on event registration and marketing. The component now holds the seminars quarterly and is self-sufficient. Looking to carry this success over to other components.”



“We have a retention contest and the chapters get rebates based on their retention and they get two rebates--one for handing in their mid-year report and one for their year-end reports.”

“ So many great ideas today! ”

Resources

We're sure you're dying for more! Just because CEX Virtual is done, doesn't mean the fun stops here. Explore the Billhighway and Mariner knowledge banks to keep learning how to improve your National-chapter relationships.

The full attendee chat transcript can be found [here!](#)

Of course, [Mariner's research/articles](#) are my go-to!!

Love that question of metrics. Check out the [2019 Chapter Benchmarking Report From Billhighway & Mariner](#) for a list and build from there.

[Association resources by Billhighway](#), created just for associations with components (chapters, sections, states, and affiliates).

Conclusion

Where do we go next? Use this recap of our discussion to ignite conversations in your association. Use the thought-provoking questions to evaluate your programs, your strategy, and perhaps your thinking. Use the words of wisdom from the chat to reflect on your own programs.

Then, commit to one or two actions. Will you call up one of the speakers and learn more? Will you pull out your chapter leadership agenda from last year and consider how to change it up? Will you check out some of the resources?

Will you make a commitment to your own learning? Maybe put the CRP webinars hosted by Mariner and Billhighway on your calendar or subscribe to the Billhighway and Mariner resource blogs.

#LeverageChapters

Thanks for coming!

Want to stay connected? Join our component relations community!

Keep an eye on our [Events page](#) so you can join our next joint webinar, CRP virtual meetup, [subscribe to Billhighway updates](#), or follow Billhighway on [Twitter](#), [Facebook](#), or [LinkedIn](#) and [subscribe to Mariner Management](#) or follow them on [Twitter](#) and [LinkedIn](#). We're always here for you!

And we're hosting our fourth annual CEX: Association Component Exchange. Check out the www.leveragechapters.com to stay up-to-date on the agenda and registration. We hope you'll join us this year!

“ I hate to miss the last five minutes - the first 55 were awesome! ”