



## **CHAPTER LEADERS RESOURCE PAGE – DASHBOARD METRIC DATA CHEAT SHEET**

Following are simple descriptions for each of the metric data items to be entered on a monthly basis through the CLRP for the Dashboard Reports.

### **Metric Goals Tab**

**Total Monthly Number of Volunteers:** the total number of volunteers the chapter had for the month being reported. This includes engaged board members, committee chairs, committee volunteers, task force volunteers, special projects volunteers (volunteers should be counted only once, even if they are involved in multiple committees, projects, etc.)

**Total Monthly Revenues:** the total revenue amount for the month being reported

**Total Monthly Expenses:** the total expense amount for the month being reported

**Annual Budgeted Fixed Expenses:** the amount of annual fixed expenses for the chapter. This should not include any event-related expenses, only expenses needed to keep the chapter operational (i.e. costs related to chapter administrator, bank fees, telecommunication, rent, etc.). This amount should only be updated if there is a change in your annual budgeted fixed expenses.

**YTD Reserves:** the current balance of the reserves amounts (savings and investments only) for the month being reported (reserves balances may fluctuate month-by-month as deposits and/or withdrawals are made)

**Total Monthly Overall Education Program Survey Score:** the total sum of the survey scores for all educational events for the month being reported **(1)**

**(1)** the following questions must be part of all educational events held by the chapter (1 – 5 rating) and the scores of the last item (overall program) are to be added: i.e.  $4.3 + 4.6 + 4.8 + 4.3 + 4.9 + 4.0 = 26.9$  (the sum of all scores, 26.9, should be entered)

Please rate your overall satisfaction with each of the following from today's program:

Quality of the presenter

Communication skill of the presenter

Overall Content

Usable take-away from this session

The overall program (enter the sum of all scores from *this question only* in your dashboard)

**Total Monthly Number of Education Survey Responses:** the total number of survey responses for all educational events, regardless of how many people registered for the event, for the month being reported **(2)**

**(2)** In the above example **(1)** there were 6 survey responses, regardless of how many people registered for the event, and this is the number that should be entered



## **Engagement Statistics Tab**

**Total Number of Monthly Educational Events:** the total number of educational events (non-accredited) the chapter had for the month being reported

**Total Number of Monthly Accredited Education Events:** the total number of accredited educational events the chapter had for the month being reported. Accredited educational events are those that provide clock hours/continued education units for participants. These can be in collaboration with another associations (ASAE/CSAE, ILEA, PCMA, etc.), educational organization (city colleges, universities, etc.) or other organizations like the Event Industry Council.

**Total Number of Monthly Networking/Social Events:** the total number of networking/social events the chapter had for the month being reported

**Total Number of Member Attendees at All Monthly Events:** the total number of members that attended all chapter events (educational, accredited, networking and social) for the month being reported

**Total Number of Industry-Affiliated Non-Members Attending All Monthly Events:** the total number of non-members who are part of the meetings/events industry that attended all chapter events (educational, accredited, networking and social) for the month being reported. This should only include industry people who could potentially become a member after attending a chapter event

**Total Monthly Non-Member Conversions:** the total number of new members for the chapter for the month being report from the non-member list of past chapter events' attendees (chapters are to run new member reports and cross check with past non-member attendees of the current fiscal year and report how many of the new members attended a past chapter event as a non-member)

**Total Number of New Members Attending All Monthly Events:** the total number of new members that attended their first chapter event (educational, accredited, networking or social) for the month being reported. The highest membership cancellations happen within the first 24 months of a member joining and tracking their engagement through participation at chapter events will assist the VP of Membership and the Membership Committee(s) identify members that have not engaged with the chapter and reach out to them

**Metric Dashboard Notes:** any note the chapter wants to report about the metrics being entered for the month that is being reported (i.e. the educational event had a very good turnout thus the higher than anticipated revenue for this month)