**Drive Chapter Behavior with Targeted Benchmarking – May 26, 2021**

**Webinar Transcription**

2

00:00:04.020 --> 00:00:15.389

Peggy Hoffman: I always love seeing the doors open and folks coming in a miss the faces but it's always good to see folks.

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00:00:16.289 --> 00:00:16.529

Peter Houstle: There uh.

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00:00:17.910 --> 00:00:18.330

Peggy Hoffman: huh.

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00:00:18.660 --> 00:00:19.740

Peter Houstle: They are streaming in.

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00:00:20.100 --> 00:00:32.370

Peggy Hoffman: They are we've got Anthony and Debbie and Aaron couple of errands I love that Lacey and shelly and sherry hey guys as you're coming in, throw in to chat.

7

00:00:34.140 --> 00:00:50.760

Peggy Hoffman: question of what makes you smile this morning, when you when you get first got started working did you what was the first thing that made you smile, what was the first thing that made you smile so let's go ahead and share that hi shelly, thank you for jumping on chat and getting us started.

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00:00:53.130 --> 00:01:02.130

Peggy Hoffman: We got a great conversation I had my primed Peter, and he is ready to go and to share some really good content here.

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00:01:03.120 --> 00:01:12.330

Peter Houstle: My test it out my story with the cicadas yesterday, and it was just a standing ovation they are all up in arms, making all kinds of crazy noise, it was great.

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00:01:13.920 --> 00:01:21.630

Peggy Hoffman: Oh Debbie I love that walking the dogs always nice to kind of get out there and just have some cool stuff that's great.

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00:01:25.650 --> 00:01:30.780

Peggy Hoffman: Calendar full of meetings, but she said this one's really good nice weather from wm excellent.

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00:01:32.730 --> 00:01:44.580

Peggy Hoffman: yeah so Wednesday’s is my we call it workout Wednesdays we go to a trainer, and so I smile today because he has this new thing called the agility star.

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00:01:45.060 --> 00:01:57.750

Peggy Hoffman: And he puts all these little lights on the floor and then you have to run to them and turn them off based on the color and it was just so much fun, if you have to work out, you might as well, have some fun so that's what made me smile.

14

00:01:59.010 --> 00:02:01.020

Peggy Hoffman: No rain awesome.

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00:02:02.880 --> 00:02:15.960

Peggy Hoffman: We are getting some folks in here lots of lots of names I recognize and a bunch that are maybe newbies hey Michelle I hope that annual meeting went well, I think you it's been finished at this point.

16

00:02:17.610 --> 00:02:23.970

Peggy Hoffman: Tracy’s on good to see you Tracy Julie and Judy hi.

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00:02:25.320 --> 00:02:27.360

Peggy Hoffman: and number of folks.

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00:02:29.850 --> 00:02:36.240

Peggy Hoffman: yeah it's always good so guys we're just throwing in to the chat what makes you smile.

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00:02:37.380 --> 00:02:48.330

Peggy Hoffman: And Michelle says yes, that they had a good annual meeting and all does not always make us feel good when we've had something that's easy to smile so.

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00:02:50.160 --> 00:02:53.460

Peggy Hoffman: Jane I see your name popping in that is awesome.

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00:02:54.570 --> 00:03:09.660

Peggy Hoffman: We got about a minute to go so folks grab your beverage of choice, tell us what made you smile this morning, so we can start off with some good big grins and we really.

22

00:03:10.230 --> 00:03:14.970

Peter Houstle: scared Jason’s kids make him smile, I wonder how all those kids are.

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00:03:17.010 --> 00:03:20.250

Peter Houstle: I guess they're under 10 because when they're under 10 they still love you.

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00:03:20.490 --> 00:03:32.670

Peggy Hoffman: Yes, and guys, just a quick note, as we go, we always For those of you who have been with us, you know the chat is usually on fire and Peters got lots of questions he's going to ask you today.

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00:03:33.090 --> 00:03:47.760

Peggy Hoffman: When you are responding so that all the groups can see everybody can see go ahead and respond to all panelists and attendees 1010 and eight so Jason’s got some twins that's gonna make you smile I love it I love it.

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00:03:50.040 --> 00:03:59.580

Peggy Hoffman: Oh, oh Aaron you don't even know Peter, we could show we can show our fish that's the only pet we have here we have a whole wonderful group.

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00:04:00.870 --> 00:04:03.270

Peggy Hoffman: thing of fish, I don't know if they're going to be able to see it.

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00:04:03.270 --> 00:04:05.640

Peter Houstle: Peter real soon as I turned everything off so.

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00:04:06.210 --> 00:04:08.850

Peter Houstle: we'll try that some other time yeah yep.

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00:04:09.870 --> 00:04:31.020

Peggy Hoffman: Oh Jill a second time this week actually we're great to see you again absolutely okay Peter we've got 12 o'clock on the top, so let me turn it over to you I’m going to go off video so Peter is going to be the star super excited to get started here and over to you, Peter.

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00:04:37.230 --> 00:04:38.430

Peter Houstle: hey so.

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00:04:39.780 --> 00:04:45.540

Peter Houstle: Driving chapter behavior with targeted benchmarking, so what is benchmarking?

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00:04:46.650 --> 00:04:56.790

Peter Houstle: Well, according to Webster benchmarking is setting a standard by which others may be judged setting a standard by which others may be judged we're all about comparing right we're comparing a to be.

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00:04:57.210 --> 00:05:03.210

Peter Houstle: My horse is faster than your House my dad stronger than your dad my chapter is better than your chapter.

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00:05:04.440 --> 00:05:04.770

Peter Houstle: hmm.

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00:05:06.210 --> 00:05:23.340

Peter Houstle: Well, maybe we want to think a little differently about this, so when I was a kid my parents used to play this game called scrabble SCR a bb l E I can't remember how many points you get for that, but any rate it's a game, some of you may have heard of if you haven't Google it.

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00:05:24.930 --> 00:05:42.150

Peter Houstle: But they played scrabble in a different way they used to play with another couple they really enjoyed playing together and their goal was not to beat each other, their goal was to beat the board to get the best possible score as a group that they could get they were thinking as a team.

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00:05:43.440 --> 00:05:57.330

Peter Houstle: And when we talk today about Chapter benchmarking I’m going to suggest maybe we need to think differently about what benchmarking should be used for how can we help our chapters beat the board, as it were.

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00:05:58.380 --> 00:06:03.780

Peter Houstle: So hang on there we're gonna we're going to get there, but first we have a word from some of our great sponsors.

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00:06:04.830 --> 00:06:14.010

Peter Houstle: And today, our sponsors are surprise Billhighway and Mariner. Billhighway helps you get the data and Mariner helps you figure out what it all means.

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00:06:14.760 --> 00:06:29.460

Peter Houstle: Be sure to check out our websites for all those wonderful details and speaking of details mark your calendars on June 30. My partner Peggy Hoffman will be working with Billhighway folks to help you map your volunteer learning journey.

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00:06:30.570 --> 00:06:38.370

Peter Houstle: From 12 to 1pm Eastern Standard Time there's a link that I think will probably be available in the chat at some point or other there, it is thanks Sarah.

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00:06:38.850 --> 00:06:48.600

Peter Houstle: And also don't forget that on Friday June 4 Mariner and Billhighway will be collaborating at the.

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00:06:49.200 --> 00:06:59.340

Peter Houstle: MM&C and looking at bright spots and how can we take our chapters that are really knocking it out of the park and replicate their performance across our entire chapter system.

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00:07:00.240 --> 00:07:04.830

Peter Houstle: So, with all that said then hey who's that guy.

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00:07:05.310 --> 00:07:13.050

Peter Houstle: that's your presenter Peter hostile I’m the CEO of mariner management I’m also the Executive Director of two associations, the metro DC chapter of the.

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00:07:13.320 --> 00:07:19.530

Peter Houstle: appraisal Institute and the Maryland Recycling Network, they are two of our management consulting or management clients.

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00:07:20.040 --> 00:07:24.330

Peter Houstle: We spend actually most of our time, these days, talking to associations about their chapters.

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00:07:24.870 --> 00:07:36.660

Peter Houstle: And about their volunteers and usually those two things find a way to blend together, but one of the cool things about this this job of managing these two associations is we work with volunteers and chapters every single day.

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00:07:38.010 --> 00:07:53.520

Peter Houstle: When I was CEO of a National Association many moons ago I had a variety of chapters, and I think I hated all of them I’m not sure I hit it all about I hated most of them, they didn't seem to want to do what I wanted them to do.

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00:07:54.540 --> 00:08:03.840

Peter Houstle: They seem to want to do their own thing, and of course that drove me absolutely crazy, because I was while I was the CEO of the National Association why aren't they bending to my will.

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00:08:04.470 --> 00:08:12.060

Peter Houstle: Suffice to say I never figured that one out and I’m beginning to figure that out now and that's what we're going to talk about today, so if we take a look at our agenda.

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00:08:13.410 --> 00:08:27.690

Peter Houstle: We want to think about what is effective when we look at our chapters which chapters are actually effective, what is it what does that word mean, and how are we trying to move our chapters towards effectiveness as opposed to.

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00:08:29.010 --> 00:08:39.450

Peter Houstle: activists and then, what do we assess what are we counting and why are we counting it and how do we benchmark and now today's conversation is not about comparing association.

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00:08:39.930 --> 00:08:42.510

Peter Houstle: association chapter systems to each other.

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00:08:43.320 --> 00:08:52.620

Peter Houstle: today's conversation is about how we compare our chapters to each other to identify who's knocking out of the park where the bright spots and how can we replicate those bright spots.

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00:08:53.070 --> 00:09:00.570

Peter Houstle: So those three areas what's effective what do we assess how do we count things and how do we benchmark, how do we compare.

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00:09:02.340 --> 00:09:15.600

Peter Houstle: So I’m like you in the chat just to take a minute and think of your absolute favorite chapter think of your absolute favorite chapter, what makes that chapter stand out for you, what is it that really makes you go oh that's my favorite chapter.

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00:09:17.460 --> 00:09:24.810

Peter Houstle: let's see the let's see that the chat roll with that positivity from the leaders communication awesome people.

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00:09:26.550 --> 00:09:37.080

Peter Houstle: Okay, strong leadership thanks Jenny collaboration volunteer engagement connected to mission connected the mission I love that actually reply to our emails.

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00:09:38.550 --> 00:09:49.230

Peter Houstle: Support the mission, the strategic plan coach of coachable volunteers yesterday that they're malleable they will and Jason your kids are malleable right now about four or five years.

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00:09:50.970 --> 00:10:03.390

Peter Houstle: engaged with the global organization supported the national vision and mission, yes, very, these are all really important things and actually adds value locally and we've we're working on a.

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00:10:04.800 --> 00:10:13.800

Peter Houstle: Chapter benchmarking study, but this time we're going about it a little bit differently and we just completed to CEO roundtables we were asking them.

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00:10:14.070 --> 00:10:28.470

Peter Houstle: You know why do you have chapters what's the purpose they serve what's the value they create and what makes an effective chapter, so we really hope to really dig deeply across the Community, with this whole notion of Chapter effectiveness, but I would ask the question.

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00:10:29.610 --> 00:10:37.350

Peter Houstle: You know if the chapter is your favorite is it does it mean it's effective doesn't actually get the job done and what job.

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00:10:38.250 --> 00:10:40.410

Peter Houstle: Is it doing and it's getting done.

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00:10:41.160 --> 00:10:52.890

Peter Houstle: So we want to take a look at this word, effective and trying to get some sense of what we're trying to get to right now and part of the problem we struggle with is we it's sometimes hard to differentiate between chapter activity.

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00:10:53.550 --> 00:11:01.320

Peter Houstle: and meaningful results chapters may do a lot of things, but do they make a difference, do they move the needle do they help the Member do they move the mission.

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00:11:02.430 --> 00:11:08.550

Peter Houstle: That we have some chapters that that do all kinds of things, all the time is some chapters that do relatively few things.

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00:11:09.090 --> 00:11:20.700

Peter Houstle: But some of the chapters that do a lot of stuff don't do it very well and some of the chapters that do with just a few things do those things really well and they make a substantial difference in our effort as an organization to move our mission.

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00:11:21.720 --> 00:11:24.330

Peter Houstle: So let's take a look for a minute I’m going to go back to.

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00:11:25.350 --> 00:11:28.500

Peter Houstle: Our chapter benchmarking are studying in the past.

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00:11:29.760 --> 00:11:38.580

Peter Houstle: let's go let's do a poll here, Sarah, what do you currently measure when you're measuring your chapters, what are the metrics that you're trying to get your arms around.

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00:11:39.360 --> 00:11:47.010

Peter Houstle: Administration do they do they dot the i's and cross the team awareness to their Members know that they exist activity, do they do stuff.

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00:11:47.640 --> 00:11:55.770

Peter Houstle: engagement to their members participate usually a tough one, for people to get their arms around satisfaction to their Members like what they do.

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00:11:56.160 --> 00:12:07.110

Peter Houstle: and retention to their members renew and renewal or growth, do they attract new members, and I would suggest, most importantly, their mission do they do things that actually move the mission.

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00:12:08.040 --> 00:12:24.750

Peter Houstle: Okay, so I’m looking at our at our tally so far and it looks like activities, probably the one that's in the lead closely followed by retention and growth, and then administration behind that awareness and satisfaction and the mission our way in the back of the pack.

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00:12:27.060 --> 00:12:29.730

Peter Houstle: looks like about three quarters of our folks have voted.

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00:12:30.990 --> 00:12:35.850

Peter Houstle: The popcorn in the microwave looks like it's about stops so Sarah why don't you share these results.

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00:12:38.610 --> 00:12:42.420

Peter Houstle: We can see that we like to measure activity are they doing stuff.

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00:12:43.920 --> 00:12:49.650

Peter Houstle: So lots of times will count how many meetings, did you have how many events that you have how many golf tournaments did you have how many.

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00:12:50.190 --> 00:13:00.150

Peter Houstle: Whatever did you do and those can and I’m not suggesting, those are important things to measure, but we want to make sure that they're ultimately tied back to the mission right and.

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00:13:01.590 --> 00:13:19.440

Peter Houstle: Yes indeed, so mission was sort of a I guess it was not quite last, but it was very close to last so we're going to talk today about how we can get to that so let's keep moving through our slide deck and we go ahead and close that poll out and go to our next slide and ask another poll.

84

00:13:20.460 --> 00:13:26.010

Peter Houstle: How are most of your metrics collected, how did you know they do what they do.

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00:13:27.180 --> 00:13:37.500

Peter Houstle: or they self-reporting, are you working in a shared data platform or common system, so this everything is generated for you or some combination of the above.

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00:13:39.570 --> 00:13:47.670

Peter Houstle: And usually the self-reporting stuff is the stuff that drives us NUTS when we're managing chapters right because we when we're not sure whether to believe them or not.

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00:13:48.030 --> 00:13:54.780

Peter Houstle: And way too often we feel like we're pulling teeth or they're reluctant to to share the data with us, and so that makes us.

88

00:13:55.080 --> 00:14:05.010

Peter Houstle: We sort of getting up into a an us and them conversation and we're the bad guy where the where the bad cop and they're going, why are you being on me about this silly report that you want me to do.

89

00:14:06.480 --> 00:14:08.820

Peter Houstle: So when I look at the number, so far, it looks like.

90

00:14:09.960 --> 00:14:19.200

Peter Houstle: Self reported is about half the group and some combination of the above, is right behind that and a few people have a shared data platform and common systems.

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00:14:19.770 --> 00:14:33.570

Peter Houstle: And you've probably heard me say numerous times let's get ourselves on a common platform let's have shared data let's count the same things the same way, so that we all, when we say I’ve got 20 apples.

92

00:14:34.110 --> 00:14:38.460

Peter Houstle: I actually have 20 apples not 20 aardvarks okay yeah.

93

00:14:39.120 --> 00:14:49.530

Peter Houstle: Thanks Sarah and, yes, you can see that the self reporting is still the dominant way in which we get our information from our chapters, so that does limit us in many cases, because, first of all.

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00:14:50.010 --> 00:14:55.800

Peter Houstle: Some chapters are not terribly sophisticated about how they count things it may be that they're working on I’ll probably.

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00:14:56.310 --> 00:15:06.390

Peter Houstle: Post, it notes, which you can't see because they're green or they can be working on the excel spreadsheets some have sophisticated data management systems, but that's probably the exception, not the rule.

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00:15:06.870 --> 00:15:17.070

Peter Houstle: Okay let's go to our next poll then Sarah, how do you actually use the results of your benchmarking, how do you use the results.

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00:15:17.850 --> 00:15:27.600

Peter Houstle: You spotlight successes, do you do remedial training you offer financial rewards that people get rebates, because for any kind of financial anything.

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00:15:28.230 --> 00:15:33.330

Peter Houstle: Based on how they perform do they get additional support if they needed or whether they need it or not.

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00:15:34.230 --> 00:15:47.760

Peter Houstle: You cut the cord and that's we haven't seen too many associations willing to cut the cord, but there are lots of times when I’m wondering why are you keeping this this group around they don't seem to be doing much and then there's some other things that they may be doing.

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00:15:50.100 --> 00:15:55.590

Peter Houstle: And you'll notice that their chapters have to file a report to get the get the do share and that's a pretty common.

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00:15:56.790 --> 00:16:02.460

Peter Houstle: pair of handcuffs we put on chapters, we were trying to get them to toe the line, as it were.

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00:16:06.450 --> 00:16:14.370

Peter Houstle: Okay, it looks like spotlight successes that is that the leader of the pack and that's great to hear, because I think going back to this notion of we want to beat the board.

103

00:16:14.760 --> 00:16:24.210

Peter Houstle: In scrabble for not trying to beat each other, I think the goal is how do we show everybody what's working well and create a an incentive for them to go down that same road.

104

00:16:26.400 --> 00:16:31.290

Peter Houstle: And I see Aaron they checkers inactive we demoed them to a networking group.

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00:16:31.740 --> 00:16:37.560

Peter Houstle: And if they cannot recover we dissolve the group so at least there is sort of a hierarchy of consequences to.

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00:16:37.830 --> 00:16:46.890

Peter Houstle: To their performance and that's important because I think accountability is something that we tend to shy away from a lot of times when we're working with both chapters and with volunteers.

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00:16:47.760 --> 00:17:05.160

Peter Houstle: Okay, so spotlight successes was definitely number one additional support was right there at the top, and there were a few folks that actually cut the cord cool, thank you very much okay good stuff so let's let's take this conversation in a slightly different direction here.

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00:17:06.600 --> 00:17:09.030

Peter Houstle: and talk about what we're counting.

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00:17:10.080 --> 00:17:10.560

Peter Houstle: and

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00:17:12.390 --> 00:17:17.640

Peter Houstle: Lots of times we count lots of things and we're not really sure if there are things that actually count.

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00:17:18.210 --> 00:17:29.340

Peter Houstle: And I think it's important we count the things that reflect meaningful effect of this and i'm going to tell you the story of a tale of two chapters, as it were, and I’m not going to say who this chapter is but.

112

00:17:29.940 --> 00:17:34.350

Peter Houstle: Who this association is I don't want to embarrass anybody, but I think it's an important story.

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00:17:35.370 --> 00:17:49.200

Peter Houstle: This association is they have an operations manual for their chapter that's all chapters that's 160 pages long 160 pages of operations stuff for their chapters to deal with.

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00:17:50.430 --> 00:18:02.610

Peter Houstle: The word mission I think appears maybe a handful of times and there's no real discussion about how are we setting goals and how those goals drive the mission of the organization.

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00:18:04.110 --> 00:18:10.320

Peter Houstle: And they have these things they call minimum requirements if you want to stay in business, this is what you got to do on an ongoing basis.

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00:18:10.710 --> 00:18:22.740

Peter Houstle: And there are absolutely no mission or a Member service metrics inside those minimum requirements they're all about organizational compliance and my Daddy my eyes and my crossing my t's.

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00:18:23.490 --> 00:18:31.800

Peter Houstle: Well, in 2020 you may all remember, there was this pandemic thing that came along, and there were two chapters that were literally sort of side by side.

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00:18:32.820 --> 00:18:43.950

Peter Houstle: And one chapter basically did nothing they went into hibernation, but they did all the minimum requirements things they filed all the reports they done it all as i's and cross all the t's.

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00:18:44.910 --> 00:18:47.910

Peter Houstle: The other chapter went out and said hey our Members need our help.

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00:18:48.360 --> 00:18:55.620

Peter Houstle: So they went out and they had a whole series of town halls they brought in experts from all over the place to talk about you know what's an essential worker.

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00:18:55.890 --> 00:19:06.960

Peter Houstle: Can I can I do my job, how can I do my job, what are the things I need to do they posted things on their website they referred to lots of other resources people could go to to to stay in business to keep doing what they.

122

00:19:07.410 --> 00:19:10.740

Peter Houstle: What they what they wanted to do to keep doing their job and making a living.

123

00:19:11.850 --> 00:19:21.900

Peter Houstle: They burned, a lot of calories MySpace but they got zero credit for that, because the minimum requirements, the system that that this association has in place doesn't recognize them for doing things that move the mission to serve the Member.

124

00:19:22.560 --> 00:19:29.490

Peter Houstle: And in fact at the other year at the end of the year, they had not had quote unquote a chapter meeting.

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00:19:29.970 --> 00:19:38.280

Peter Houstle: Now a chapter meeting is a time when we bring the Members, together, we talk about Chapter business and that really doesn't have anything to do.

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00:19:38.760 --> 00:19:49.170

Peter Houstle: With Member business or mission business, and so they were actually threatened with losing their dues rebate, because they didn't have for Chapter meetings.

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00:19:49.890 --> 00:19:56.400

Peter Houstle: And that's where I think we get ourselves twisted into the into enough that really isn't serving the serving the Community.

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00:19:57.120 --> 00:20:09.360

Peter Houstle: Going back to our game of scrabble our goal is to beat the board, how can we, how can we be a team, how can we think of our chapters as a team, how can we help the chapters themselves think of themselves as part of a team.

129

00:20:09.840 --> 00:20:16.710

Peter Houstle: And the minute we fail to recognize what's important to them, we begin to lose sight of what it actually means to be a team.

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00:20:17.340 --> 00:20:27.000

Peter Houstle: So the key here then it's looking at strategic effectiveness and there are variety of ways in which we can measure that and one of the areas that we talked about a lot is alignment.

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00:20:27.420 --> 00:20:33.240

Peter Houstle: And that's really one of the major themes of this conversation, how do we get everybody pointed in the same direction.

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00:20:33.810 --> 00:20:39.000

Peter Houstle: Shooting for the same goals and so that's where we need to have a shared vision and a shared mission.

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00:20:39.420 --> 00:20:44.040

Peter Houstle: And you find this in the business, this is not just an association thing this isn't the business world generally.

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00:20:44.250 --> 00:20:51.990

Peter Houstle: The most successful businesses are those were the culture of the Organization has a clear and well-defined focus on the organizational mission.

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00:20:52.230 --> 00:21:05.670

Peter Houstle: and vision everybody from the CEO down to the janitor who cleans the toilets all understand this is what we're all about this is why we do what we do in our 2019 benchmarking survey or 2018 benchmarking survey.

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00:21:06.780 --> 00:21:16.890

Peter Houstle: Slightly more than half of the respondents reported that their chapters were usually well aligned, which means that almost half we're not usually well aligned we're just.

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00:21:17.910 --> 00:21:21.510

Peter Houstle: We want to fix that one right, and of course we also look at quality control.

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00:21:21.960 --> 00:21:32.040

Peter Houstle: Over and over it again, we will hear about this concern that the Member experience very significantly from chapter to chapter and we want our Members, wherever they are.

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00:21:32.430 --> 00:21:50.460

Peter Houstle: To get the best possible experience with our organization, we went the value proposition from the Members perspective to be the best it can be, and in in our survey again 29% of the respondents score their chapter systems in the top two quintiles with respect to quality, while the majority.

140

00:21:51.630 --> 00:22:03.180

Peter Houstle: 60 70% said yeah not so much not that great pretty uneven and again we want to want to have good even quality across the system and high quality and, of course, is the juice worth the squeeze.

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00:22:04.110 --> 00:22:14.670

Peter Houstle: Are the results worth the effort, only a third, and our 2019 survey of the responded suggested that their chapters actually we're worth the effort that they were putting forth.

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00:22:15.030 --> 00:22:20.190

Peter Houstle: So that that just doesn't sound right to me, we need to fix that we need to, we need to come to.

143

00:22:20.820 --> 00:22:28.590

Peter Houstle: An agreement about what the ROI should be and find a way to get there and then last but not least, we all look at risk mitigation.

144

00:22:29.220 --> 00:22:37.890

Peter Houstle: And that's a place where we're all trying to make sure that they don't do anything that's going to get us all thrown in jail or get all their members sued for something or other.

145

00:22:39.030 --> 00:22:44.220

Peter Houstle: And again what we found was, and this is speaks well to risk mitigation in that.

146

00:22:44.760 --> 00:22:50.430

Peter Houstle: 4% celebrated their chapters risk free 74% that there were only occasional missteps.

147

00:22:50.700 --> 00:23:00.330

Peter Houstle: So I what I’m what I’m suggesting here is, as I think most chapters most chapter leaders want to do the right thing and they're going to do the right thing, most of the time.

148

00:23:00.990 --> 00:23:11.640

Peter Houstle: But we certainly burn a lot of calories trying to make sure that they do it we try to put some handcuffs on them to push them to report to us oh yes I’m doing all the right things the right way.

149

00:23:12.990 --> 00:23:24.660

Peter Houstle: what's the downside of that is if you're going zero miles an hour, you have zero risk right if you're not moving you have zero risk, but when you have zero risk, you have zero reward.

150

00:23:25.260 --> 00:23:34.530

Peter Houstle: So where is that place on that speedometer where we can we can be moving at a good pace, but not had such a risky paste that we run off the road and.

151

00:23:35.250 --> 00:23:45.090

Peter Houstle: and have that accident, and I think most of us most chapter leaders and most chapter execs want to do the right thing we want to drive at a safe speed, but we want to get there, we want to get there.

152

00:23:47.520 --> 00:23:47.970

Peter Houstle: So.

153

00:23:48.990 --> 00:23:53.070

Peter Houstle: Why do we assess why don't we benchmark or to rephrase this you know.

154

00:23:54.960 --> 00:23:58.890

Peter Houstle: Why do we count and compare, why do we count and compare.

155

00:23:59.970 --> 00:24:08.940

Peter Houstle: Well they're there there's three valid reasons that we want to focus on today, and the first one is simply to focus attention on what's truly important.

156

00:24:09.930 --> 00:24:16.920

Peter Houstle: And one of the struggles that Peggy and I often have and we're working with organizations trying to address this issue of Chapter benchmarking.

157

00:24:17.490 --> 00:24:26.250

Peter Houstle: Is when we look at their system it doesn't really tell you what's important it just has this long checklist of things that you're supposed to do.

158

00:24:27.270 --> 00:24:33.960

Peter Houstle: And there's no hierarchy of those things and having bylaws submitting your minutes.

159

00:24:34.980 --> 00:24:40.530

Peter Houstle: could be as important as delivering a good advocacy program in the state Capitol.

160

00:24:41.640 --> 00:24:51.330

Peter Houstle: But I would say those things are nowhere near each other, I would say the advocacy piece is far and away the far more important if that's critical to your mission.

161

00:24:52.050 --> 00:25:01.500

Peter Houstle: Because again if you're if you're doubting those administrative i's and crossing those bureaucratic teas but you're not moving the mission who cares so.

162

00:25:01.980 --> 00:25:14.580

Peter Houstle: We want to help make sure our chapter leaders are execs are volunteer leaders understand what's important and then of course we want to identify the bright spots and I’ll remind you again June 3 at MC.

163

00:25:16.470 --> 00:25:28.920

Peter Houstle: murder and bill hi will be talking about bright spots, how do we replicate them, how do we take those chapters that are knocking it out of out of the park and help others look, just like them again, how do we beat the board.

164

00:25:30.090 --> 00:25:35.250

Peter Houstle: And then, last but not least, we want, we want to make the make sure the juice is worth the squeeze.

165

00:25:35.580 --> 00:25:43.020

Peter Houstle: We want to make sure that what we're doing is worth the effort and, most importantly, we want to make sure what the volunteers are doing it's worth the effort.

166

00:25:43.380 --> 00:25:50.400

Peter Houstle: Now Peggy and I are both passionate about volunteers and we hate to see volunteer calories burned without creating any useful heat.

167

00:25:50.820 --> 00:25:58.350

Peter Houstle: So let's make sure that our chapters are doing the right things, and then all comes back to this notion, you need to measure what matters.

168

00:25:58.770 --> 00:26:08.460

Peter Houstle: If you're trying to lose weight and yeah you want to probably count your calories you want to exercise, but if you're not losing weight, then, are you counting the right things.

169

00:26:09.450 --> 00:26:15.330

Peter Houstle: We want to make sure that we're counting the things that actually make a difference and usually either right stuff.

170

00:26:16.170 --> 00:26:28.530

Peter Houstle: Reducing the calories exercising that's going to help you reduce weight, but not always, and if it's not helping you reduce weight, then you got to figure out well, what is it that's helping me can help me reduce weight, I need to look at some of the other metrics.

171

00:26:29.670 --> 00:26:40.950

Peter Houstle: As you've probably heard any number of times you can't met manage what you can't or don't measure and Peter Drucker or jack welch or one of those people said that at least that's what I understand and, of course.

172

00:26:41.550 --> 00:26:53.070

Peter Houstle: If you don't measure it you can't improve it and that's really what we're trying to do here right, we want to improve things so in order to improve them, we have to start with what's the baseline where are we starting, how do we make it better.

173

00:26:54.240 --> 00:27:05.700

Peter Houstle: And of course experience tells us over and over and over again, we tend to manage what we measure we tend to manage what we measured if you wear a Fitbit.

174

00:27:06.390 --> 00:27:14.580

Peter Houstle: you're going to count your steps and you're going to try to get 1000 5000 10,000 steps that's where your head's going to be focused.

175

00:27:15.240 --> 00:27:31.260

Peter Houstle: I want to make that number show up on my Fitbit because that's what my Fitbit is telling me to do so if we're measuring the right things that's great But what if we're measuring the wrong things remember the tale of two chapters right.

176

00:27:32.310 --> 00:27:38.940

Peter Houstle: Chapter A they were they were meeting all the minimum requirements chapter be was moving the mission of serving the Member.

177

00:27:40.620 --> 00:27:49.560

Peter Houstle: But Chapter A was getting rewarded for for dotting i's and crossing t's it had nothing to do with moving the mission and serving the Member.

178

00:27:51.180 --> 00:27:57.030

Peter Houstle: So we really struggled with this question, you know what do we focus on your organizational metrics for the mission metrics.

179

00:27:58.410 --> 00:27:59.790

Peter Houstle: Where we focus on both.

180

00:28:01.260 --> 00:28:06.270

Peter Houstle: And I think you'll see as we go through this, we need to focus on both we can't ignore risk management.

181

00:28:07.380 --> 00:28:20.460

Peter Houstle: But the question is not do we ignored the question is where do we place our emphasis, and I think that's the paradigm, we want to shift today again I’ll go back to the scrabble metaphor, you want to beat the board not each other.

182

00:28:23.100 --> 00:28:24.900

Peter Houstle: risk mitigation is critical.

183

00:28:26.100 --> 00:28:30.930

Peter Houstle: But if we focus solely on risk we would never have gone to the moon never.

184

00:28:34.110 --> 00:28:45.150

Peter Houstle: The faster you drive the sooner, you get there, it may be fast, it may be, you save us to go zero miles an hour, but you're not going to get to the moon, that while you're not going to get the Glen burnie that way, for that matter.

185

00:28:47.040 --> 00:28:53.520

Peter Houstle: there's another equally important question for us to take a look at and that's the question that effort versus results.

186

00:28:54.060 --> 00:29:06.090

Peter Houstle: Do we want to focus on effort how hard they try or results, how much they actually get done and that's a tough question because sometimes you know if everybody's a winner nobody's a winner.

187

00:29:07.260 --> 00:29:13.530

Peter Houstle: I can't we're back to the army are we comparing people trying to figure out who's better are we trying to figure out how we can all be better.

188

00:29:14.730 --> 00:29:23.940

Peter Houstle: Or do we don't look at both, and I think there are reasons for us to look at those because results are important if everybody's making the effort but we're not getting the results that we need to do something.

189

00:29:25.500 --> 00:29:32.850

Peter Houstle: So I’ll go back to our 20 2018 park me chapter benchmark metrics these were the things that we looked at back then.

190

00:29:33.240 --> 00:29:44.820

Peter Houstle: And this is what it showed most associations were putting at the top of their list, as it were, and you see that the bylaws was the top of the heap everybody looks at bylaws.

191

00:29:46.560 --> 00:29:48.060

Peter Houstle: leadership positions filled.

192

00:29:49.200 --> 00:29:58.350

Peter Houstle: seemed like an important thing I can sort of agree that that could be an important thing, but again if the leadership positions are filled but they're not doing anything hmm who cares.

193

00:29:59.010 --> 00:30:10.980

Peter Houstle: Membership retention membership recruitment was pretty high up there, but then let's let's ask ourselves the question how many people have had chapters that knocked it out of the park when it came to membership recruitment.

194

00:30:11.970 --> 00:30:21.990

Peter Houstle: And my experience, very few have actually pulled that one off i've only seen that work really well in federation's where basically the chapters which are the.

195

00:30:22.440 --> 00:30:28.260

Peter Houstle: The source of membership for the headquarters organization, are the ones that drive membership and it's in their.

196

00:30:28.590 --> 00:30:36.630

Peter Houstle: best interest to have lots of Members or I remember the entrepreneurs organization, and I emphasize the word entrepreneurs organization.

197

00:30:37.170 --> 00:30:45.570

Peter Houstle: were offered a competitive opportunity to make an additional 10,000 bucks for their chapter if they could get their membership recruitment numbers, up to a certain level.

198

00:30:46.050 --> 00:30:52.590

Peter Houstle: But generally the experience of Peggy and I’ve had is that chapters are not the greatest membership recruitment tools for organization.

199

00:30:53.640 --> 00:31:00.960

Peter Houstle: And you look through this list of things that we were measuring and they're not too many mission related things in here that seemed to float to the top.

200

00:31:01.650 --> 00:31:14.880

Peter Houstle: Lots of stuff like insurance and branding agreements filing an annual report getting yourself incorporated all that stuff was rated pretty highly but now is that really is it really critical to moving the mission and serving the Member.

201

00:31:17.010 --> 00:31:20.310

Peter Houstle: So I think we need to focus first on the mission.

202

00:31:21.630 --> 00:31:29.730

Peter Houstle: that's really critical focus first on the mission so let's do a quick poll here are your the majority of your chapters run by paid staff.

203

00:31:31.110 --> 00:31:33.960

Peter Houstle: Volunteers or not sure.

204

00:31:41.070 --> 00:31:43.650

Peter Houstle: Okay, it looks like volunteers are away in the lead here.

205

00:31:47.610 --> 00:31:53.580

Peter Houstle: way up at the top of the pile yes indeed not too many run by paid staff.

206

00:31:55.050 --> 00:32:05.940

Peter Houstle: So looks like the majority of our folks have weighed in here and it looks like most of the chapters that of the folks that are on the call today are run by volunteers.

207

00:32:07.380 --> 00:32:08.310

Peter Houstle: Why is that important.

208

00:32:09.510 --> 00:32:09.870

Peter Houstle: well.

209

00:32:11.220 --> 00:32:14.400

Peter Houstle: let's think about this question of what we're asking them to focus on.

210

00:32:15.810 --> 00:32:17.790

Peter Houstle: what's important to our volunteers.

211

00:32:19.530 --> 00:32:21.960

Peter Houstle: Well, our volunteers care about the mission.

212

00:32:23.400 --> 00:32:26.160

Peter Houstle: it's why they're here it's what they care about.

213

00:32:27.600 --> 00:32:35.520

Peter Houstle: If you want to get a volunteer leader to go someplace for you, you got to reach their heart you got to go for their passion.

214

00:32:36.120 --> 00:32:51.000

Peter Houstle: And their passion, quite frankly, it's not an articles of incorporation meeting minutes annual reports and stuff they just don't care about that stuff they care about why they joined the organization in the first place and that's all about the mission.

215

00:32:53.040 --> 00:32:57.480

Peter Houstle: So we need to focus on what they care about not what we care about.

216

00:33:01.830 --> 00:33:07.080

Peter Houstle: that's the way we drive alignment if we all have that shared vision and mission alignments pretty easy to get.

217

00:33:08.790 --> 00:33:16.020

Peter Houstle: It allows people to really focus on where they're trying to go and not necessarily all pick the same direction or the same method of transportation.

218

00:33:18.210 --> 00:33:21.750

Peter Houstle: We want to emphasize purpose, rather than process.

219

00:33:22.860 --> 00:33:25.200

Peter Houstle: emphasize purpose, rather than process.

220

00:33:26.820 --> 00:33:30.750

Peter Houstle: And we want to be flexible about how they get it done.

221

00:33:33.750 --> 00:33:41.010

Peter Houstle: This is all about celebrating different this is really where we really tap into the collective wisdom.

222

00:33:41.970 --> 00:33:54.360

Peter Houstle: and creativity of our system of our team we allow everybody in the team to to bring it we allow and actually we encourage our chapters to try things out and failure is okay.

223

00:33:54.960 --> 00:34:11.190

Peter Houstle: If we if we're too stuck on risk mitigation failure is not Okay, so the less emphasis we place on risk mitigation, the more likely we're going to encourage our chapters to try things out and discover some bright spots that maybe wouldn't have come across at all.

224

00:34:14.130 --> 00:34:20.580

Peter Houstle: and send you also makes the note, allowing large, medium and small chapters to participate equally, and I think that's.

225

00:34:20.970 --> 00:34:25.170

Peter Houstle: Sometimes we tend to differentiate based on a variety of dimensions size, being one of them.

226

00:34:25.470 --> 00:34:30.240

Peter Houstle: And I think those dimensions may be important in terms of the resources they can bring to the table.

227

00:34:30.510 --> 00:34:41.490

Peter Houstle: But it is not important, with respect to the creativity and the ideas that they can bring to the table, sometimes the smallest of chapters are the most fleet and nimble and creative.

228

00:34:41.880 --> 00:34:48.120

Peter Houstle: let's take advantage of all of our chapters, regardless of where they are, how big they are, how many Members, they have any of those dimensions.

229

00:34:49.980 --> 00:34:58.710

Peter Houstle: So in the chat I’d like you to go ahead, and this is a test, this is a test, what is your associations mission.

230

00:35:00.180 --> 00:35:09.330

Peter Houstle: And I don't know you don't need to do the whole paragraph thing let's see if we can condense that mission down that one or two sentences let's take a look at some association missions here.

231

00:35:12.510 --> 00:35:14.910

Peter Houstle: I see everybody's scrambling now they're all having to their.

232

00:35:17.040 --> 00:35:22.170

Peter Houstle: improve the quality of health information from a professionalism excellence and civility in legal the legal profession.

233

00:35:23.190 --> 00:35:24.630

Peter Houstle: And power grid professionals.

234

00:35:26.760 --> 00:35:32.670

Peter Houstle: srt is advance and elevate medical imaging and radiation therapy profession and to enhance the quality and safety of patient care.

235

00:35:33.930 --> 00:35:38.010

Peter Houstle: connect people and organizations across borders to save and change lives.

236

00:35:40.800 --> 00:35:44.970

Peter Houstle: Promoting fire protection sides, the professional fire protection engineers.

237

00:35:47.940 --> 00:35:51.510

Peter Houstle: Knowledge resources empower.

238

00:35:52.950 --> 00:36:00.210

Peter Houstle: make the world a better place, these are all very powerful statements, these are all powerful wise.

239

00:36:02.550 --> 00:36:08.970

Peter Houstle: We have to ask ourselves how do we tie these wise these missions.

240

00:36:09.450 --> 00:36:20.400

Peter Houstle: To our metrics, how do we, how do we make these two things fit together, because you look at these things you say well how am I going to measure that and to what extent can I hold my chapters at all responsible for moving the nation hmm.

241

00:36:20.970 --> 00:36:27.060

Peter Houstle: that's a tough one that's a tough one, so let's try to make the connection and I’m going to I’m going to pick on.

242

00:36:28.080 --> 00:36:33.600

Peter Houstle: an organization that I happen to have which I happen to be the executive director because that's what we're trying to do here.

243

00:36:35.130 --> 00:36:43.800

Peter Houstle: And that's the Maryland recycling network and right away, you can see the green theme here so there's sort of a an environmental.

244

00:36:44.280 --> 00:36:49.800

Peter Houstle: cause at play here, that one can wrap one's arms around, but I can tell you I’m looking at all the other.

245

00:36:50.700 --> 00:36:59.640

Peter Houstle: missions that we see out there every single one of them has a cause embedded in it there's a place where I bet you from the Members perspective their heart is in it.

246

00:37:00.210 --> 00:37:10.170

Peter Houstle: Regardless of what the professional the industry may be they're passionate about what they do and that's why they step up and they want to work with the volunteer workers volunteers for their for their chapters.

247

00:37:11.580 --> 00:37:26.130

Peter Houstle: So, in the case of the Maryland recycling network their mission is to is to promote the sustainable reduction, reuse and recycling in Maryland Those are the three r's we all heard about them, reduce reuse recycle.

248

00:37:27.300 --> 00:37:38.670

Peter Houstle: Pretty simple sort of focus for the organization and their vision, and this is important, their vision is it materials, otherwise destined for disposal in our state are reused or recycled.

249

00:37:39.030 --> 00:37:43.260

Peter Houstle: In other words, they're not going into the landfill they're not going into an incinerator they're actually.

250

00:37:43.830 --> 00:37:52.110

Peter Houstle: Continuing to create value for our society and they're all kinds of great consequences of this mission and vision for our environment.

251

00:37:52.530 --> 00:37:58.140

Peter Houstle: And the This is why the members of MRN are passionate about what they do, they get excited about this.

252

00:37:59.070 --> 00:38:06.480

Peter Houstle: So our metrics are really focused on how do we get there, and so again, what do we measure here, how do we, how do we tell this has happened.

253

00:38:06.810 --> 00:38:11.910

Peter Houstle: Well, you can actually there are there are measurable sitting inside of this and I challenge every one of you to take a look at your missions.

254

00:38:12.150 --> 00:38:18.810

Peter Houstle: And figure out where the measurable goals are there and how you can tie that back to your to your chapters, so we look at the Maryland recycling network.

255

00:38:19.170 --> 00:38:26.100

Peter Houstle: We have a couple of key metrics that they pay a lot of attention to, and these are actually measured by the Maryland Department of the Environment.

256

00:38:26.820 --> 00:38:31.890

Peter Houstle: And what is the waste diversion rate and the other one is the recycling tonnage.

257

00:38:32.700 --> 00:38:39.090

Peter Houstle: How much stuff is not going into the landfill and how much of that stuff that's not going to landfill is being recycled.

258

00:38:39.600 --> 00:38:51.750

Peter Houstle: And implicit in that, particularly in the waste diversion question is reduction, because the smaller the pile of stuff going into the system, the better.

259

00:38:52.680 --> 00:39:05.580

Peter Houstle: So those are the two key metrics that we look at and we say okay to what extent are we moving that one way or the other, now, if you think about that from the mayor recycling networks perspective and they're a small organization they don't have a big budget, they have a staff of oh.

260

00:39:07.320 --> 00:39:08.100

Peter Houstle: Let me count me.

261

00:39:09.240 --> 00:39:18.180

Peter Houstle: Actually me and I’m taking a Carol so the three of us work at Fort for MRN and, quite frankly, we are as passionate about MRN.

262

00:39:20.040 --> 00:39:33.120

Peter Houstle: As I think the volunteers are but that's important for us, but we recognize that our ability as a as an association to directly affect the diversion and recycling rates in Maryland is somewhat limited.

263

00:39:33.480 --> 00:39:38.580

Peter Houstle: Right, because the government does some things that might make a difference, private sector does some things that might.

264

00:39:38.850 --> 00:39:47.730

Peter Houstle: make a difference and oh those citizens out here, they do lots of things that could make a big difference, but sometimes we have a hard time helping them understand that.

265

00:39:47.970 --> 00:40:01.260

Peter Houstle: I remember the recycling coordinator for Baltimore city complaining to me one time, he said I’ll put out a trash can and a recycle bin on the street and I’ll go buy it the next day and there's lots of trash and recycled materials and they're all on the sidewalk so.

266

00:40:02.520 --> 00:40:09.990

Peter Houstle: Our ability to move that mission and serve that Member sometimes it's somewhat limited, but these are the things that we focus on.

267

00:40:10.560 --> 00:40:19.440

Peter Houstle: And I would suggest that we want to help our chapter leaders focus first and foremost on one of the key mission metrics of our association.

268

00:40:19.650 --> 00:40:29.700

Peter Houstle: And how are those metrics doing and how can they contribute well that question of how can they contribute, it is what I want to tackle next because there are actually some very specific things that they may be doing.

269

00:40:30.570 --> 00:40:41.310

Peter Houstle: And it's not going to be the same across chapters it's going to depend upon where their interest, is where the capacity is where their skill experience etc. are so in the case of MRN, as you might expect.

270

00:40:42.360 --> 00:40:43.680

Peter Houstle: advocacy is very important.

271

00:40:44.700 --> 00:40:51.870

Peter Houstle: The Maryland General Assembly is in session 90 days of the year, though, any legislator will tell you that.

272

00:40:52.920 --> 00:41:02.010

Peter Houstle: it's not a three month session by a long shot in fact I had one legislator tell me the next time somebody tells me this is a three month like your job I’m going to shoot him in the expletive deleted.

273

00:41:03.480 --> 00:41:08.820

Peter Houstle: But in the course of that 90 days they pass something on the order of I don't know.

274

00:41:10.020 --> 00:41:20.160

Peter Houstle: 787 or 800 different pieces of legislation and consider over 2000 so it's kind of a it's that proverbial you know you're watching the making of sausage.

275

00:41:20.640 --> 00:41:29.190

Peter Houstle: But in the case of MRN ran we're really saying how do we make sure that legislation is getting through that is supporting this driving the three r's.

276

00:41:29.400 --> 00:41:34.110

Peter Houstle: and, equally importantly, how do we make sure that their legislation that's getting through this that's not.

277

00:41:34.590 --> 00:41:43.590

Peter Houstle: obstructing the three r's and that's where we burn calories we spent a fair chunk of time doing that and we can count the number of bills to get past that we'd like.

278

00:41:44.070 --> 00:41:49.440

Peter Houstle: And we can count the number of bills that could propose that don't get past Those are two very countable things.

279

00:41:49.710 --> 00:41:59.910

Peter Houstle: And we measure them every year that's very important to us to make sure we've got the right ratio of good stuff to not so good stuff and ideally that not so good stuff is as close to zero, as it could possibly be.

280

00:42:01.080 --> 00:42:04.320

Peter Houstle: that's not the only thing that we do the other place that we go, of course.

281

00:42:05.520 --> 00:42:13.620

Peter Houstle: Like most associations we're in the education business, we want our Members to learn how to do things better, faster cheaper, etc.

282

00:42:14.100 --> 00:42:23.820

Peter Houstle: So we are metric is a well-attended highly rated conference workshops webinars and tours which build our Members expertise in the three r's.

283

00:42:24.600 --> 00:42:31.650

Peter Houstle: Those are all measurable, we can count how many events that we put on but, more importantly, how many people attend.

284

00:42:32.070 --> 00:42:46.380

Peter Houstle: And most importantly, how satisfied, they are, how much value they get from the things that they attend so Peggy I often see associations that will count how many events their chapters do and I’m going okay that's great how many events that they do.

285

00:42:48.090 --> 00:42:51.960

Peter Houstle: But did they help their Members get better how many people actually showed up.

286

00:42:52.560 --> 00:43:04.200

Peter Houstle: And what's there what's their market penetration what percentage of their members actually show up at half things so those are important subsidiary metrics that we can look at when we look at this question of.

287

00:43:04.710 --> 00:43:09.870

Peter Houstle: Education how well are we serving the Members, those are really the two things that MRN does.

288

00:43:10.500 --> 00:43:22.650

Peter Houstle: Are there other things that could do good to do a public relations campaign sure probably doesn't have the dollars to do it very well, but it could be another check mark on that list right if public relations campaigns were on that list.

289

00:43:23.760 --> 00:43:31.950

Peter Houstle: There it could it could have golf tournaments it could do all kinds of things that they don't have the resources or the interest, quite frankly, and doing.

290

00:43:32.370 --> 00:43:41.310

Peter Houstle: But these are things at advocates advocacy and education that make a significant difference for the Maryland recycling community and that's where we burn calories.

291

00:43:41.670 --> 00:43:45.690

Peter Houstle: So that's where I think in terms of what, what are we measuring, why are we measuring it.

292

00:43:46.410 --> 00:43:54.510

Peter Houstle: We want to have that mission related focus and I think if you each of you took your mission and said hmm where are the metrics sitting inside of that.

293

00:43:54.780 --> 00:44:04.650

Peter Houstle: How could I take those metrics and put them in front of my chapters and help my chapters move those metrics in the right direction you'd be surprised at how many great places things could be different than they are right now.

294

00:44:05.880 --> 00:44:13.770

Peter Houstle: So the ideal benchmarking hierarchy obviously starts with a mission right and one of the activities, then the drive that mission.

295

00:44:14.790 --> 00:44:25.080

Peter Houstle: And last and least last and least not saying unimportant, but last and least we look at the organizational metrics are they done any dotting the i's crossing the t's.

296

00:44:25.290 --> 00:44:31.290

Peter Houstle: Do they have their insurance policy in place all that kind of fun stuff that's interesting stuff but from a volunteer leaders perspective.

297

00:44:31.650 --> 00:44:46.770

Peter Houstle: that's the stuff that I really just don't want to burn calories on unless I absolutely have to I will only do that I will only do that if doing that is essential to helping me move the mission and serve them and that's where my eyes are focused.

298

00:44:48.060 --> 00:44:55.320

Peter Houstle: So I want to ask each of you for your homework assignment once you go look at all your chapter metrics what are you measuring.

299

00:44:57.120 --> 00:45:06.150

Peter Houstle: And do you measure what matters to what extent is that hierarchy is that list of things in a hierarchy that places the mission first.

300

00:45:06.510 --> 00:45:13.710

Peter Houstle: Or is there any hierarchy at all remember if everything's important than nothing is important, so I think that's.

301

00:45:14.430 --> 00:45:22.830

Peter Houstle: Critical to making sure that our volunteer leaders understand where we're trying to go and getting them excited about the mission and the vision, the organization every time we talk to them.

302

00:45:23.280 --> 00:45:27.540

Peter Houstle: If you have a dashboard does that dashboard put the mission right at the top and show how we're doing.

303

00:45:27.930 --> 00:45:35.850

Peter Houstle: On that mission and then show the activities that the chapters as a group, as a team are putting on to drive that mission forward.

304

00:45:36.780 --> 00:45:48.060

Peter Houstle: The more we can help them see themselves as part of our organization not separate from our organization, the more likely they are to stay aligned and focused on where we think they should go.

305

00:45:49.830 --> 00:45:59.040

Peter Houstle: Ultimately, if you want to drive chapter behavior with targeted benching the benchmarking, you need to measure what matters.

306

00:46:00.540 --> 00:46:01.830

measure what matters.

307

00:46:05.580 --> 00:46:06.330

Peter Houstle: Okay guys.

308

00:46:08.280 --> 00:46:08.880

Peter Houstle: it's your turn.

309

00:46:11.130 --> 00:46:13.020

Peter Houstle: Questions observations.

310

00:46:26.280 --> 00:46:31.230

Peter Houstle: So Jill I like that notion of Member approved tasks and events that feedback in the mission.

311

00:46:33.990 --> 00:46:41.160

Peter Houstle: I wonder how many people actually talk to their Members about how they see the organization moving the mission that's a great that's a great thought.

312

00:46:43.200 --> 00:46:46.320

Peter Houstle: Sometimes members aren't really sure if the patient is.

313

00:46:56.100 --> 00:46:58.080

Peter Houstle: So let's see.

314

00:47:00.540 --> 00:47:06.180

Peter Houstle: Angela says her words premise points based and points are good, because they're accountable.

315

00:47:14.370 --> 00:47:23.550

Peter Houstle: So, Michelle suggests that they measure, a lot of important administrative stuff, but it can be framed to focus on the mission impact of doing those things well.

316

00:47:24.030 --> 00:47:34.680

Peter Houstle: And Michelle I think that's true, but I think it's also important that we find a way to put those things in the context of the mission and not let them be to salient.

317

00:47:37.680 --> 00:47:40.500

Peter Houstle: Kelly’s asking for there are there any methods or platforms.

318

00:47:40.890 --> 00:47:52.320

Peter Houstle: We recommend for sharing stuff out and there are lots of big business, business intelligence platforms out there that have a wonderful way of graphically representing.

319

00:47:53.250 --> 00:48:06.540

Peter Houstle: data and way too often we tend to overload people with excel spreadsheets with a bunch of numbers and their eyes glaze over so to the extent that you can use something like Tableau, and they have a free version.

320

00:48:07.710 --> 00:48:13.110

Peter Houstle: That can help you present information graphically I would certainly recommend doing that.

321

00:48:14.040 --> 00:48:15.000

Peter Houstle: and

322

00:48:15.300 --> 00:48:24.390

Peggy Hoffman: I’m sorry Peter, this is Peggy listen that's a great question that Shelley asked about what our methods and platforms, you would measure I’m wondering if folks in chat could throw in.

323

00:48:24.750 --> 00:48:36.060

Peggy Hoffman: what's their answer to that, in other words what methods or platforms are some of you guys using because there could be you know, this is the wisdom of the crowd guys if it kind of helps us.

324

00:48:36.810 --> 00:48:52.230

Peggy Hoffman: Take a look at some of those things, so I just wanted to suggest that and I also just wanted to mention Peter, and maybe you can you can answer this question is, how can you incentivize chapters to provide information because.

325

00:48:52.560 --> 00:48:59.850

Peggy Hoffman: Girls got that challenge, and several people on this challenge yeah Michelle I I sympathize I empathize.

326

00:49:01.170 --> 00:49:05.550

Peter Houstle: that that is not that's not an easy that that's not an easy nut to crack.

327

00:49:06.720 --> 00:49:15.390

Peter Houstle: Because a lot of times again it comes back to who are we asking, and what are we asking them for and, most importantly, why are we asking them for it.

328

00:49:16.200 --> 00:49:20.490

Peter Houstle: And, most of the time, I find that particularly if your attackers are volunteer run.

329

00:49:21.480 --> 00:49:27.330

Peter Houstle: The administrative stuff is of the least interest to them and usually the most difficult for them to put together.

330

00:49:27.930 --> 00:49:35.940

Peter Houstle: So I would take a look at how you're asking for it and what you're asking for and ask for only the most important things.

331

00:49:36.600 --> 00:49:46.320

Peter Houstle: And the fewer things you asked for the more likely, you are to get them and the perceived importance of those things to the mission, the more likely, you are to get them.

332

00:49:47.100 --> 00:49:54.630

Peter Houstle: But when we ask volunteers to go through all kinds of crazy shenanigans and crazy calculations, to give us a report.

333

00:49:55.410 --> 00:50:03.480

Peter Houstle: The odds are we're gonna fight hard to get it, I think, ultimately, the best solution for that problem is a shared shared systems common.

334

00:50:04.050 --> 00:50:11.850

Peter Houstle: Whether they're your membership management systems, your accounting systems to get them all on the same platform is a great way to go, we were doing some work with the.

335

00:50:11.850 --> 00:50:14.070

Peter Houstle: financial planning association last year.

336

00:50:14.310 --> 00:50:20.820

Peter Houstle: And they ran into that pandemic thing and try to turn them sideways but they had a wonderful concept called one FPA.

337

00:50:21.390 --> 00:50:33.690

Peter Houstle: And the whole idea was they were they were bringing all of their chapters on to a common platform for accounting for data management for communications for registrations everything was being run through a common system.

338

00:50:35.550 --> 00:50:37.410

Peter Houstle: The appraisal Institute has a common system.

339

00:50:37.590 --> 00:50:38.730

Peter Houstle: For all their.

340

00:50:38.880 --> 00:50:51.180

Peter Houstle: For I would say, the majority of their their data management in their accounting at this point, more and more association associations are moving in that direction for the very reason Michelle and you bring up it's tough to get.

341

00:50:51.720 --> 00:51:00.510

Peter Houstle: The volunteers or the exacts to comply with a bunch of recording reporting requirements so far better to have it done automatically.

342

00:51:00.930 --> 00:51:17.490

Peter Houstle: So they don't have to lift a finger to get it, and the advantage of doing that is the minute you do that, you have a common data taxonomy you're all speaking the same language you know 12 apples or 12 apples not 1205 aardvarks and to orangutans or whatever.

343

00:51:18.540 --> 00:51:20.220

Peter Houstle: And so you can both.

344

00:51:21.420 --> 00:51:25.890

Peter Houstle: eat more easily compare across the system but you're also speaking of common language that.

345

00:51:29.100 --> 00:51:31.050

Peggy Hoffman: point let me ask a question that was that.

346

00:51:31.050 --> 00:51:37.170

Peggy Hoffman: was put in the Q amp a and it's related to some things but which is so that we've got all of these.

347

00:51:38.190 --> 00:51:45.990

Peggy Hoffman: metrics and we want to, we want to connect with them what's the best way for us to communicate, how do we bring all of these variety of chapters.

348

00:51:46.500 --> 00:52:00.390

Peggy Hoffman: In and could there be something in the form of a mature this being chapter leader orientation should be in a guidebook you know what are some of the effective practices for communicating and bringing people to the table to the table for that.

349

00:52:00.960 --> 00:52:02.610

Peter Houstle: So that's a great question.

350

00:52:02.640 --> 00:52:13.260

Peter Houstle: And it has lots of answers, some of which going to work better for for one organization or another, but I usually I think you know Peggy and I, you and I usually suggest that.

351

00:52:14.580 --> 00:52:21.450

Peter Houstle: We are really looking at is not a solution, there are a number of solutions that really need to be worked together.

352

00:52:22.320 --> 00:52:35.910

Peter Houstle: The chapter leader program whatever it may be, and certainly an opportunity to begin to educate people about what these things are and why they're important, but I think we need to look at this as a 24 by seven exercise.

353

00:52:36.390 --> 00:52:42.150

Peter Houstle: We need to think about systems that are that are available on demand, because the reality is particularly with volunteers.

354

00:52:43.230 --> 00:52:52.470

Peter Houstle: they're not paying attention to us nearly as much as we're paying attention to us for us for me I’m 24 by seven I pay attention to myself, all the time.

355

00:52:53.070 --> 00:52:58.350

Peter Houstle: For most chapter leaders, particularly if they're volunteers we're getting about that much of their attention.

356

00:52:59.310 --> 00:53:07.260

Peter Houstle: So we need to make sure we get that attention we use it very well and, most importantly, we need to make sure that that we allow them to dip in.

357

00:53:07.740 --> 00:53:16.050

Peter Houstle: When it's most convenient for them, so I think a combination of a chapter portal of real time with real time data reporting is useful.

358

00:53:16.380 --> 00:53:24.840

Peter Houstle: I think, using the chapter leader program is great, I think, using your outbound communications, whether the email social media whatever you're using to communicate with your chapter leaders.

359

00:53:25.110 --> 00:53:31.740

Peter Houstle: To on an ongoing basis, reinforcing hey here's how we're doing with our mission here's how you're doing with our mission.

360

00:53:32.130 --> 00:53:36.720

Peter Houstle: Here are things that we see that really excite us because they're there are other ways of.

361

00:53:37.380 --> 00:53:52.770

Peter Houstle: Moving that mission those kinds of communications I think it's the con the sum of the parts is greater than the whole and then I think the more things that you can do, the more likely, you are to help people become aware of what's important.

362

00:53:53.520 --> 00:54:10.500

Peggy Hoffman: So Peter we go to other questions and it's really cool because many of these questions are coming in along sort of the same theme around this communications and I loved how you emphasize multi-channel because, as you said, our volunteers are very they're very distracted.

363

00:54:11.790 --> 00:54:22.560

Peggy Hoffman: Monica said so let's say that we've managed to get them all on the same page and they've done this, but now they're pushing back at how HQ is measuring them, so, in other words.

364

00:54:22.950 --> 00:54:35.610

Peggy Hoffman: we've communicated some value to this about doing this process, but now they're possibly it's because they're unhappy with the with the thing so I’m going to ask you that question and I got one more question behind that.

365

00:54:35.910 --> 00:54:38.850

Peter Houstle: Okay, so that's a great question and Monica.

366

00:54:40.770 --> 00:54:47.880

Peter Houstle: The there's an answer I’m going to I’m going to point to, and this may be a little different than for some folks but the associate general contractors.

367

00:54:48.330 --> 00:54:56.520

Peter Houstle: Now they're a federation so that's a little different, but this is what's really cool is the federation, the chapter members got together and said hey.

368

00:54:57.060 --> 00:55:03.930

Peter Houstle: We need to do a group assessment, we need to self assess right and share that assessment across the entire system.

369

00:55:04.260 --> 00:55:13.650

Peter Houstle: It was it came from them, it didn't come from headquarters headquarters is in the conversation, and I think that the point I’m making here is that.

370

00:55:14.130 --> 00:55:21.540

Peter Houstle: When you're putting these systems together the extent to which you invite the chapter leadership to participate in the development of the system.

371

00:55:21.810 --> 00:55:32.610

Peter Houstle: is going to have a direct impact on their willingness to participate, and the more ownership, they have of how the system is designed the questions that asks the the requirements.

372

00:55:33.000 --> 00:55:41.370

Peter Houstle: It puts in place, the more likely, you are to get compliance if they feel like this is just something you're you've went into a back room and wrote a bunch of stuff down said hey.

373

00:55:41.670 --> 00:55:50.280

Peter Houstle: Here are all the things you got to do 1-234-567-8910 do that, where you don't get any money they're going to say well I’m not gonna tell you what they're going to say because it's a.

374

00:55:51.600 --> 00:56:04.980

Peter Houstle: Anyway, but I think getting them involved in the conversation from the get go is is critical to getting their ownership their engagement and their compliance for.

375

00:56:05.250 --> 00:56:12.180

Peggy Hoffman: You wouldn't you, would you agree that there's two other pieces to that as well, one is the transparency of the data so.

376

00:56:12.780 --> 00:56:23.040

Peggy Hoffman: What data, am I using how am I manipulating and how am I pulling it together, and I think sometimes the pushback is because they don't understand the data and I’m not a data person people so.

377

00:56:24.330 --> 00:56:34.470

Peggy Hoffman: You have to kind of explain some things to me, so I think that that kind of is a help, but I think the other thing we saw several things in the chat Peter and I had to go back I think Jill was one of them a couple people.

378

00:56:34.950 --> 00:56:41.820

Peggy Hoffman: If you are using the data for positivity, in other words, I saw I saw and.

379

00:56:42.540 --> 00:56:50.370

Peggy Hoffman: A chat recently where someone said as soon as they went out to their chapters and they said here's this service that we're providing because you asked it.

380

00:56:50.640 --> 00:56:57.930

Peggy Hoffman: Everybody was like oh wow they listen so maybe the pushback is because they don't they don't see the outcome of that data.

381

00:56:58.650 --> 00:57:02.520

Peggy Hoffman: So I want to bring those two things but Peter, I also want to ask you one more question.

382

00:57:03.000 --> 00:57:14.070

Peggy Hoffman: This one comes from an SMS about have we seen any chapters that have a subscription based type of agreement with an association, so this is where as I’m understanding they sign up for services.

383

00:57:14.970 --> 00:57:21.900

Peggy Hoffman: And you know they're probably getting from the from the from HQ and they pay with a debit to their membership dues.

384

00:57:22.380 --> 00:57:37.920

Peggy Hoffman: rebate and I think that she's I think she's just asking if we've seen that kind of thing, and maybe the cool thing about that is that might tie into kind of some benchmarking, you might have some shared data, but any comments to that.

385

00:57:38.790 --> 00:57:44.670

Peter Houstle: So I don't know specifically have an association that's using a what I would call a cafeteria.

386

00:57:46.320 --> 00:57:56.730

Peter Houstle: system where they're the chapters can buy into different services, I know I’ve seen chatter about that, but I don't have any personal experience with associations that have done that.

387

00:57:58.200 --> 00:58:06.360

Peter Houstle: The again the question becomes do, what is your what's the basis upon which they decide what they need and.

388

00:58:08.250 --> 00:58:17.070

Peter Houstle: that's the that's where the metrics are so important because the metrics should be what drives that decision to select the service they may need.

389

00:58:17.550 --> 00:58:24.030

Peter Houstle: I’ll go back to this notion of not focusing so much on the how but focusing on the results.

390

00:58:24.510 --> 00:58:38.700

Peter Houstle: And, and the advantage of a subscription service or a cafeteria program is they can really say here are the things that we think we need to do to move the mission let's get the resources to make that happen let's not buy stuff we don't need.

391

00:58:39.180 --> 00:58:43.020

Peter Houstle: And that allows them to better use the limited resources they have at their disposal.

392

00:58:43.740 --> 00:58:56.130

Peter Houstle: So I think in principle that sounds like a great idea I’m not quite sure that I can share with you a specific example of anybody who's doing it if anybody on the chat knows if anyone is doing, please let us know love to talk to them.

393

00:59:01.650 --> 00:59:10.950

Peggy Hoffman: And Peter, let me ask you one last question this came up in an earlier conversation I had with an association and that was this this conversation about.

394

00:59:12.660 --> 00:59:18.360

Peggy Hoffman: The difference between approaching this reporting as benchmarking versus reporting.

395

00:59:18.780 --> 00:59:28.680

Peggy Hoffman: And of course it gets to some of the things you've already sort of said but it's kind of a little bit of a shift in the terminology, we used to say okay I'll do the annual report.

396

00:59:29.130 --> 00:59:44.070

Peggy Hoffman: And one of the things which of course will be highlighted in the AGC story in the blog that's going to come into the on the bill highway post sometime this week is this notion of benchmarking having a different flavor can you just say anything about that.

397

00:59:45.150 --> 00:59:53.880

Peter Houstle: Well, and that was when I when I started working on this presentation, I was looking at the word benchmarking and going okay to what extent does that get my backup.

398

00:59:54.570 --> 01:00:03.900

Peter Houstle: Because, as I said at the beginning, benchmarking and according to Webster’s is where we have standard against which we are being assessed or judged.

399

01:00:04.500 --> 01:00:11.550

Peter Houstle: And whenever somebody says they're going to judge you automatically you've put yourself into a hierarchical relationship.

400

01:00:12.090 --> 01:00:30.420

Peter Houstle: And I think the real key is maybe less the terminology, then than it is the ownership of the process and that's why i'll emphasize I think if the chapters feel like they own the process in the case of AGC the chapters own the process it's not viewed as an us and them.

401

01:00:30.420 --> 01:00:40.890

Peter Houstle: conversation it's a viewed as a hey we're getting together to talk about how things are going and figure out how we can all take advantage of what's working well and what could be better.

402

01:00:43.590 --> 01:00:51.420

Peggy Hoffman: So I think you have answered the questions that bubbled up but there could be some additional questions Peter so i'm just kind of waiting to see if someone else.

403

01:00:52.080 --> 01:00:57.210

Peggy Hoffman: comes up that the last kind of question I want to ask you and I guess we're super segue.

404

01:00:58.050 --> 01:01:08.280

Peggy Hoffman: Moving a little bit maybe pivoting a little bit off the of the of the basic conversation, but is around the ROI question because mariner has done you've done a.

405

01:01:09.000 --> 01:01:25.320

Peggy Hoffman: bit more work on creating the ROI and can you just real quickly mentioned the kind of questions or the data points, maybe that folder into an ROI because there may be some cool connection here, maybe.

406

01:01:26.640 --> 01:01:46.260

Peter Houstle: Well, certainly those the ROI process is very closely related to what we're talking about today and ROI the ROI matrix the evaluation process we put together really looks at how can we monetize the value that chapters create and the question I asked in our CEO roundtables was.

407

01:01:47.280 --> 01:01:58.380

Peter Houstle: I bet every one of you can tell me to the penny how much you're spending to support your chapters in terms of payroll programs technology, etc.

408

01:01:59.460 --> 01:02:06.240

Peter Houstle: But show me on your P&L the income side, the number on the income side that justifies that amount.

409

01:02:06.750 --> 01:02:19.920

Peter Houstle: And nobody can because they haven't really monetized the value they haven't counted the value in a way that can be translated into $1 amount that justifies how much However much they're spending so if you go to the mariner website, or just Google.

410

01:02:21.240 --> 01:02:32.820

Peter Houstle: Mariner ROI and chapters you'll see a series of areas that we look at in the valuation matrix and they're all about the things that we're counting that chapters may or may not be doing.

411

01:02:33.510 --> 01:02:40.950

Peter Houstle: Not to suggest the chapters should do all those things it's just we want to take a look at the things they aren't doing and see how well they're doing and what difference they're making.

412

01:02:41.850 --> 01:02:51.000

Peter Houstle: Again, the tying it back to the mission, I think, is the central message that I want to bring today that, if we can't tie it back to the mission.

413

01:02:51.450 --> 01:02:57.870

Peter Houstle: we're not going to get the volunteers excited about pulling this this train so let's keep this this train moving speaking of which.

414

01:02:58.830 --> 01:03:02.400

Peter Houstle: And just do One last word from our sponsors.

415

01:03:02.940 --> 01:03:07.440

Peter Houstle: Of course that's bill highway who is really great at getting the data together for you.

416

01:03:07.680 --> 01:03:16.590

Peter Houstle: And of course the folks here at Mariner we're all about helping you understand what that data means, and I think together we put together a pretty good to good team to help support.

417

01:03:16.980 --> 01:03:29.160

Peter Houstle: The chapter Community because our goal, again we give stuff away like crazy, our goal is for the the the associations that manage and and and and use chapters as an critical part of their of the ecosystem.

418

01:03:29.490 --> 01:03:41.820

Peter Houstle: We want them to be the best they can be that's what we're all about, so thank you very much to everybody drive your chapter behavior with targeted benchmarking by measuring What matters, thank you right.

419

01:03:42.000 --> 01:03:53.040

Peggy Hoffman: And last thing I want to just mention is the chapter benchmarking study will be coming out in a couple of months, and so stay tuned because we want to have you all involved and engaged in that.

420

01:03:53.340 --> 01:04:01.980

Peggy Hoffman: Peter big round of applause, thank you, thank you, thank you for being our content lead today and y'all have a good time now.

421

01:04:03.090 --> 01:04:06.540

Peggy Hoffman: See you guys next month we'll talk training.