



CHAPTER LEADERS RESOURCE PAGE – DASHBOARD METRIC DATA CHEAT SHEET

All monthly dashboard data must be entered by the end of the month following. For example, January data must be entered no later than the last day of February. If the deadline is missed or data in a previous month is inaccurate, submit a Dashboard Missing Information Template (CLRP > Chapter Administrator > Documents) to your Regional Operations Manager for a manual update.

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

Metric Engagement Goals

Volunteer Engagement: the total number of volunteers the chapter had who committed themselves for at least one (01) hour 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.).

Education Program Satisfaction Survey Score: the total sum of the survey scores for all educational events for the month being reported based on one question – Overall Program Satisfaction.

All educational event surveys must include a question that allows attendees to rate their Overall Program Satisfaction using a 5-point rating scale with 1 being the lowest satisfaction and 5 being the highest satisfaction (1 – 5 rating). The only score reported on the dashboard is the overall satisfaction question. Overall program satisfaction scores are to be added: i.e. $4 + 4 + 5 + 4 + 5 + 3 = 25$ (the sum of all scores, 25, should be entered).

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.

In the above Education Satisfaction example, there were 6 survey responses, regardless of how many people registered for the event this is the number that should be entered.

Education Events: the total number of educational events (non-accredited and accredited) the chapter had for the month being reported.

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 organizations (city colleges, universities, etc.) or other organizations like the Event Industry Council.

Networking/Social Events: the total number of networking/social events the chapter had for the month being reported.

New Member Attendance All Events: the total number of new members (who joined the chapter in the last 12 months) that attended all chapter events (educational, accredited education, networking and social) for the month being reported.

Member Attendance All Events: the total number of members that attended all chapter events (educational, accredited education, networking and social) for the month being reported.

Non-Member Attendance All Events: the total number of non-members who are part of the meetings/events industry that attended all chapter events (educational, accredited education, networking and social) for the month being reported. This should only include industry attendees who could potentially become a member after attending a chapter event.

Anti-Human Trafficking Awareness Compliance: Record the AHT Awareness activity in the month it occurs. Enter "1" if one activity was completed, and include an administrator's note briefly describing the activity (e.g., "In August, fliers were placed on all attendee chairs.").

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 or there were no events held this month).

Financial Goals

Total Revenue: the total revenue amount for the month being reported.

Total Expenses: the total expense amount for the month being reported.

Year To Date Reserves: the current balance of the reserves amounts (savings and investments only) for the month being reported (reserves balances may fluctuate month-by-month).

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.