

Application: 8626

Miller, Robin

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<b>Page: Entry Information</b>
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<b>Chapter</b> Northeast Florida Chapter
<b>Chapter Size</b> Small (50-260)
<b>Category</b> Chapter Operations and Sustainability
<b>Program Name</b> Strategic Data Management
<p><b>Each question is worth 20 points and will be scored using the following rubric:</b></p> <p><b>(1-5) Poor</b> Didn't effectively answer the question</p> <p><b>(6-1) Fair</b> Answered the question</p> <p><b>(11-15) Good</b> Answered the question with more detail</p> <p><b>(16-20) Excellent</b> Went above and beyond with proven results and visible data</p>
<p><b>Describe the program and why it fits the category. (20pts)</b></p> <p>For several years, NEFLCAI managed the membership data through Excel and Constant Contact. There were also several paid outsourced solutions for various functions of the organization, such as a paid independent contractor to produce the quarterly magazine. The systems, while not as sophisticated as they could have been, did work, until the world became virtual after the pandemic.</p> <p>We were able to hire a remote executive director in August 2020 with experience running small associations and she came to the position with several new technology tools, which fell under her "brand-focused operations" skillset. Quickly, she introduced us to several new tools, which we still use today and offer us tremendous efficiency in our operations. For our data management, event management, accounts receivable, and member portal, we use Wild Apricot. For all of our graphic design needs, we use Canva. For scheduling meetings and volunteers, we use both SignUp Genius and Doodle. We use Zoom for our meetings, and most recently have switched over to Google Docs to share materials with the board of directors.</p> <p>We have been able to move most of our functions in-house with these tools.</p>
<p><b>How did this program meet the mission and vision of the chapter and CAI as a whole? (20pts)</b></p> <p>Right before our executive director came on, we had invested in and embarked on a new website project to position ourselves with a more polished brand. Bringing the rest of our operations up to par was simply the next step in the process. Our vision was to offer a superior experience to our members and to ease an increasingly fatiguing board of directors operating under the 80/20 rule, where 20% of the people were doing 80% of the work. We wanted to utilize the new technologies available and have them work in concert with one another for a seamless and sophisticated customer experience.</p>
<p><b>What was the impact on the chapter and its members after completing the program? (Growth of membership, financially, public awareness, membership value, better chapter/member relationship, chapter operations, etc.) (20pts)</b></p> <p>Now, two years into using these tools, we have a pretty well-oiled machine, which allows us to introduce new programs and initiatives because the house is pretty much in order, and we have the capacity to take on more. Over the past two years, we have branded collateral documents that look consistent and polished. We have comparative data so we can see how we are performing financially and from a membership growth perspective. We have easy ways for our members to engage and communicate with our organization.</p>
<p><b>Please provide quantifiable data supporting the rationale for success. (20pts)</b></p> <p>When members see a well-functioning operation, they want to be a part of it. In 2021 we saw growth of 0.5% (the national growth number was 2.2%, reasonable for a COVID year). In 2022, we saw membership growth of 10.5%, more than 7% higher than the national growth percentage.</p> <p>Running statistics and reporting data (which we can now do because we have a few years of history since we started using these tools), we have processed 2,163 registrations in our Wild Apricot system. And while there is still some human processing associated with those transactions, much of it is automated, allowing for immediate payment, immediate confirmation, and accurate data regarding attendance (also allowing us to order just the appropriate amount of food and not having to guess).</p> <p>Our sponsors seem to like where the organization is going. For 2021, we secured \$29,100 in sponsorship. For 2022, we secured \$45,000 in sponsorship. And, if all are renewed for 2023, plus our new ones, we should secure \$57,600.</p>

**Based on the results, will the program be a regular part of the chapter's programs in the future and why? (20pts)**

Yes, we will always use technology that makes our operation easier and more efficient. We have found several additional ways to use the "events" portal inside Wild Apricot. For example, we use it for our Outstanding Awards application portal, our Speakers' Bureau application portal, and a Committee Report portal as well. The data we can glean from our software allows us to budget very intentionally and from a very educated perspective. The other tools we use are also cloud-based and can be used and accessed by multiple board members. For 2023, we are exploring all of the assets that Google Suite and Services offers, to make data management and communication for our board effective and easy, and hopefully free.

Supporting documents including flyers, postcards, pictures, videos etc. can be uploaded below. While they aren't required for your submission we certainly encourage it.

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Yes

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**Thank you for your submission! We encourage you to submit another program in a different category.**