



## Instructions

The following template is designed to provide a simple process for evaluating the association's performance and indicating the future direction necessary to address areas of concern. Complete the following steps.

1. Collect financial and participation data for primary programs, services and initiatives for the past 5 years.
2. Enter this information into the spaces provided. Add additional tables as necessary given the level of detail you require.
3. Review the data and indicate in the column provided whether or not the performance trend is increasing, decreasing or flat.
4. Convene a staff meeting or other activity to review and discuss the meaning of trends in the data and potential next steps to address areas of concern.

By answering "Decreased" or "Flat" you have identified an area that is trending down and merits closer attention to identify the root of the problem.

By answering, "Increased" you have identified an area of marketing success. This area should be evaluated to the reasons for success so they can be applied throughout the organization.

- Membership (all categories)
- Conferences and events including exhibits
- Distance education or information such as webinars or teleconferences
- Publications
- Sponsorship
- Product sales such as books or videotapes
- Volunteer participation

Ignore areas that do not apply and feel free to add in additional data you feel is important to your evaluation.

**Membership Outcomes**

Membership data can be broken down by membership type or, if possible by distinct member audiences.

*Primary Membership Category*

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Category	Year 1	Year 2	Year 3	Year 4	Current	Tend Line
<b>Total # of Members</b>						
<b>Total Revenue for Category</b>						
<b>Net Membership Revenue</b>						

*Secondary Membership Category*

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Category	Year 1	Year 2	Year 3	Year 4	Current	Tend Line
<b>Total # of Members</b>						
<b>Total Revenue for Category</b>						
<b>Net Membership Revenue</b>						

*Tertiary Membership Category*

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Category	Year 1	Year 2	Year 3	Year 4	Current	Tend Line
<b>Total # of Members</b>						
<b>Total Revenue for Category</b>						
<b>Net Membership Revenue</b>						

**Conference and Event Outcomes**

Conference information can be as general or as detailed you feel is necessary. Initially, identify trends in major events or for major event product lines (for example; a monthly event such as a chapter meeting). If necessary, add in additional detail to highlight specific areas or audiences.

<b>Category</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Current</b>	<b>Tend Line</b>
<b>Total # of Member Attendees</b>						
<b>Total # of Nonmember Attendees</b>						
<b>Total Revenue for Members</b>						
<b>Total Revenue for Nonmembers</b>						
<b>Net Revenue for Event</b>						
<b>Total Sponsorship for Event</b>						
<b>Total Exhibit Square Footage</b>						
<b>Total Exhibit Revenue</b>						
<b>Total Net Revenue for Exhibit</b>						

Repeat the proceeding table as often as necessary. If you analyze more than one or two products aggregate the information into a single table to understand the total trend in the product line.

**Distance Delivery Channel Outcomes**

This area includes audio and video conferences.

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<b>Category</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Current</b>	<b>Tend Line</b>
<b>Total # of Member Participants</b>						
<b>Total # of Nonmember Participants</b>						
<b>Total Revenue for Members</b>						
<b>Total Revenue for Nonmembers</b>						
<b>Net Revenue for Activity</b>						
<b>Total Sponsorship for Activity</b>						

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Repeat the proceeding table as often as necessary. If you analyze more than one or two products aggregate the information into a single table to understand the total trend in the product line.

**Publications Outcomes**

This area includes your primary journal or magazine, paper and electronic newsletters.

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<b>Category</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Current</b>	<b>Tend Line</b>
<b>Total # of Member Subscribers</b>						
<b>Total # of Nonmember Subscribers</b>						
<b>Total # of Institutional Subscribers</b>						
<b>Total Subscription Revenue for Members</b>						
<b>Total Subscription Revenue for Nonmembers</b>						
<b>Total Revenue for Institutional Subscribers</b>						
<b>Total Advertising Revenue</b>						
<b>Net Revenue for Publication</b>						

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Repeat the proceeding table as often as necessary. If you analyze more than one or two products aggregate the information into a single table to understand the total trend in the product line.

**Product Outcomes**

This area includes the sales of distinct physical products such as books, DVDs etc.

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Category	Year 1	Year 2	Year 3	Year 4	Current	Tend Line
<b>Total # of Unit Sales</b>						
<b>Total Unit Sales Revenue</b>						
<b>Net Revenue for Publication</b>						

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Repeat the proceeding table as often as necessary. If you analyze more than one or two products aggregate the information into a single table to understand the total trend in the product line.

**Volunteer or Other Participation Outcomes**

This area includes activity that may not be revenue based. Examples include number of participants in a grass roots legislative program, committee volunteers or web site visits.

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Category	Year 1	Year 2	Year 3	Year 4	Current	Tend Line
<b>Total # of Participants</b>						
<b>Expenses for Initiative</b>						

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Repeat the proceeding table as often as necessary. If you analyze more than one or two initiatives aggregate the information into a single table to understand the total trend in the activity. For example, you could complete this table for each committee then aggregate this information into a total committee profile.