



AFP Chapter Leader Survey: Database and Website Overview Executive Summary

Background

AFP Global has initiated a critical project to develop a brand-new Salesforce-based database platform solution with partner Nimble AMS to replace its current Personify database. Project completion is targeted for late 2022, with the official platform launch starting in January 2023.

Most critical to the success of this endeavor will be database and website solutions AFP Global is able to provide to AFP chapters: Data collection and access, reporting, community tools, new websites, and the like. Providing an integrated solution will allow AFP Global and the chapters to begin to achieve a 360-degree view of all member demographics and activity, and start to provide a more personalized, targeted experience across the membership.

Methodology

To ensure AFP Global has a clear understanding of chapter expectations and needs, a comprehensive survey was developed as part of the project requirements and discovery process. The survey consisted of a total of 33 substantial questions, divided into four sections (Current Chapter-Level Member Data Maintenance; AFP Global Database Information and Reporting; Current Chapter Website/Communications Process; New Database/Reporting/Website Platform Requirements)

The *AFP Chapter Leader Survey: Database and Website Overview* was sent to all identified AFP chapter leaders on November 29, 2021 (and a reminder sent two weeks later), asking each chapter to identify the appropriate or most knowledgeable person in the chapter to complete and submit this survey on behalf of the chapter.

The survey closed on December 18, 2021, with 107 of AFP 's 198 professional chapters (54%) submitting responses.

To see the full survey results, visit: <https://www.surveymonkey.com/results/SM-KXDMRDXC9/>.

Key Findings (By Section)

The following is a high-level summary of the key findings and responses to the survey questions by each section (click to jump to section):

[Section 1: Current Chapter-Level Member Data Maintenance](#)

[Section 2: AFP Global Database Information and Reporting](#)

[Section 3: Current Chapter Website/Communications Process](#)

[Section 4: New Database/Reporting/Website Platform Requirements](#)

[Section 1: Current Chapter-Level Member Data Maintenance](#)

➤ *Current Process for Managing Member Data:*

- **“Excel spreadsheets” by far was the most common answer.** Many reported that they download the spreadsheet reports accessed through AFP Global and then update and maintain their own internal spreadsheets (Excel, Google Sheets) to track membership, attendance at events, prospective members, etc. This is usually done by the Chapter Admin, or a committee.
- **A number of chapters reported using small AMS systems,** including the following: MemberClicks, NeonOne, Bloomerang, Salsa, Wild Apricot, StarChapter, AirTable. These chapters take the AFP Global reports and either upload them directly to their local AMS, or add the AP Global data to their own spreadsheets and then upload.
- In addition, there seems to be a **heavy reliance on third-party email marketing automation tools** such as MailChimp, Constant Contact, Cvent, and the like to “maintain” member lists, status and data – this information is added to the spreadsheets they create using the AFP Global report spreadsheets, or else they take the information provided by AFP Global and “update” their member lists in these marketing automation platforms.
- There seems to be a **general lack of satisfaction with their current solutions,** whether due to cost or having too many steps/platforms to switch between/maintain.
- One chapter uses an “Access” database, and reported that it uploads its member data and attendance records to its website, and members can log in to see their member event attendance and details.
- **Other comments of note:**
 - “Currently transitioning from Cvent to a system called General Meetings. We have a long-standing partnership with a technology services company. They build the database specifically to our needs. Too many of the “giants” (Cvent, Salesforce) has too many reports/data points that cannot be culled down as it is

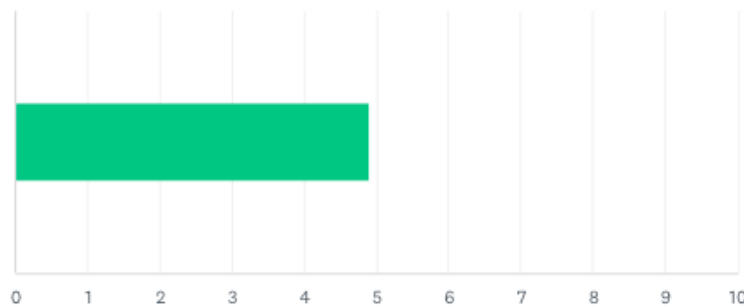
geared for large organizations, not very feasible for smaller organizations/chapters.”

- “We do not currently use a database. We try to keep an up-to-date list of members, lapsed members, potential members, and friends in MS Excel. It’s cumbersome. We’ve recently tried using Google Contacts as a contact management tool. Also cumbersome. We have other lists in MailChimp for email marketing purposes. I keep dreaming that AFP Global will offer a database option for free to chapters.”

➤ **Satisfaction with Current Process:**

How satisfied are you with the current process? (1 = “It’s Terrible”, 5 = “It’s Serviceable But Not Sure How Correct”, 10 = “It’s Perfect”):

Answered: 78 Skipped: 29



ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
Responses	5	383	78
Total Respondents: 78			

➤ **Annual Cost for Data Management Process:**

- **The most common answer here was “none/\$0”** which reflects their reliance and use on spreadsheets.
- **Technically, though, this is not a “\$0” cost**, as chapters are using data garnered from their other third-party systems (such as Cvent, Constant Contact, MailChimp, etc.) which they pay anywhere from \$120-\$3,500/year to use (and pay additional for certain uploads) to augment their spreadsheets and reports from AFP Global.
- There is also the **staff cost of an Admin** manually doing the spreadsheets and uploads, the cost of Microsoft Excel, etc.

- For those using an AMS solution, the annual amounts cover a wide range: \$468 for Little Green Light; \$900 for CharityProud and General Meetings; \$1,200 for StarChapter; \$2,400 for Bloomerang and NeonOne; \$3,700-\$6,000 for MemberClicks.

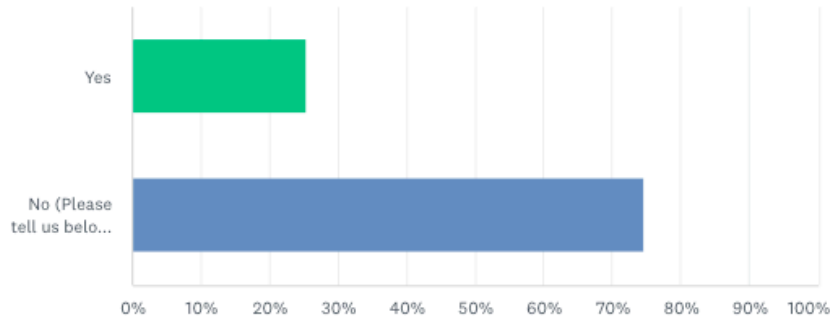
➤ *Type of Member Information Collected by Chapter:*

- Most chapters responded in one of the following three ways - that they:
 - (a) do not independently collect member information or data, and rely on the AFP Global reports for this data,
 - (b) occasional collect basic information such as age, years experience, bio, interests, gender identity, as part of event registrations, surveys, board calls, etc. and augment the data in the AFP Global reports, though not in a strategic, regular way, or
 - (c) occasional collect basic information as noted above but do nothing with it/do not augment the AFP Global report data.
- A number of chapters track touches/outreach efforts to members, lapsed and potential members – these are usually maintained via spreadsheet.
- Event registrations for local chapter gatherings are tracked, either via spreadsheets or in the event registration tools the chapter uses.
- In general, information collected on the chapter level is used internally for Board reports, setting up local events, and tracking local activity by their members.
- There is a noted disconnect between what the chapter collects and uses, and what is provided by AFP Global re: national membership.

➤ *IDEA-specific Data:*

Are you collecting inclusion, diversity, equity and access (IDEA)-specific data about your chapter members?

Answered: 75 Skipped: 32



ANSWER CHOICES	RESPONSES	
Yes	25.33%	19
No (Please tell us below why you do not at this time):	Responses 74.67%	56
TOTAL		75

Main reasons for “No”:

- Already get from AFP Global
- No way to adequately store the data
- We push members to complete AFFP Global profiles
- Small chapter – not able to use, no capacity
- Unsure how to systematically collect, align with AFP Global data
- Privacy concerns
- Not a Board priority

Types of IDEA data collected, other feedback:

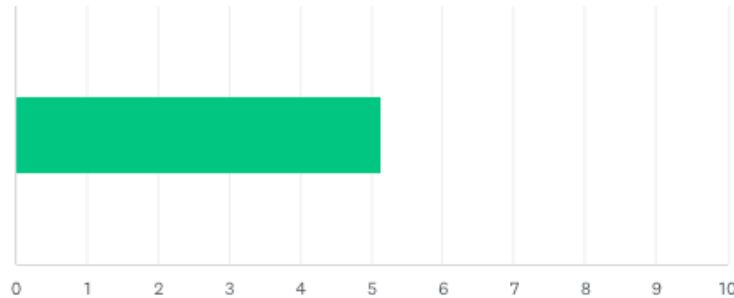
- Languages
- Age
- Ethnicity
- Race
- Areas of responsibility
- Organization questions,
- Year of birth
- Years in fundraising
- Sexual orientation
- Pronouns
- Income
- Disabilities

- Religion
- Comments of Note:
 - “We’re limited by the lack of a streamlined process for updating our chapter database, while also ensuring that it aligns with the AFP Global membership data.”
 - “Biggest hinderance is getting individuals to fill out their data. We've asked members and only about 10% responded to completing their info.”
 - “We’re currently capturing board diversity info. To be honest, I hadn’t thought of capturing this info for members. Ethically, I’m not clear on what’s appropriate and what isn’t. We don’t really know our members all that well at the moment. A lot of that has to do with the fact that we don’t have an effective database tool. Also, our member outreach has been weak”

➤ **Satisfaction with Current State of Data Collected:**

How satisfied are you with the current state of your data?
 (1 = “It’s a Mess”, 5 = “It’s Serviceable But Not Sure How Correct”, 10 = “It’s Perfect”):

Answered: 72 Skipped: 35



ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
Responses	5	370	72
Total Respondents: 72			

➤ **Current Gaps/Weaknesses:**

Representative responses:

- “AFP Global is slow to send us monthly reports and because they only update it monthly, they are not always accurate (info lag).”

- “Not sure all our members update their information when they renew their membership information.”
- “We lack an idea of where fundraisers in our community move on to.”
- “Lack stewardship/solicitation data.”
- “We’re limited by the lack of a streamlined process for updating our chapter database, while also ensuring that it aligns with the AFP Global membership data.”
- “We have no management system in place and are hesitant to add one due to integration concerns with AFP Global - don’t want to maintain/monitor duplicate systems with Global.”
- “Members will update the chapter on job changes, preferred contact info etc. but don’t update Global. Chapter administrator cannot update Global’s database. No option to add additional data collection fields to Global’s list (program attendance, demographics etc.)”
- “The gaps are that we have to maintain two databases as we can’t update the AFP Global one ourselves, and also because there are fields we track that the AFP Global one does not have including tracking of actions and contacts with our members or prospects. (I.e. if they received a new member call, new member email, renewal member email, and any notes from those contacts, etc.)”
- “Data in too many places; disorganized or inconsistent spreadsheets.”
- “Too much manual entry required.”
- “First, we don't have one. Second, if we did have one, we would appreciate it being under AFP's Global umbrella, to ensure compliance with any regulatory requirements and for a far higher level of cybersecurity than we would be able to create.”
- “Opportunities to miss important information about our members i.e. expressed interest in volunteering, long time member interested in executive level learning opportunities. Without this information, we miss the opportunity to customize stewardship of our members.”
- “We cannot see who used to be very active but has recently lost interest or how active our members are. While we know who is or isn't in; it can be cumbersome for us to learn or see how these members were engaged and make the case for renewal based on how they chose to participate. We also cannot see if memberships were paid individually or by the organization, so if that person changes jobs, it can be hard to know if we should contact the organization to purchase a new membership for the person in the role, or to follow that member to the new place - OR how to have renewal conversations.”
- “Gaps and weaknesses are due to limited, difficult to access and inaccurate data from AFP Global. Membership Reports are used with caution since we have more accurate data based on our contacts and updates directly from members.”

➤ *Use of Current AFP Global-generated Reports:*

Representative responses:

- Update mailing lists (snail, newsletters), member info (any changes are made to AFP Global profiles, so the chapter needs the reports to get any member changes – these changes are then made to the chapter’s database/spreadsheets to keep data aligned on both levels)
- Welcome new members (email, call), get names to list in newsletter, website
- Solicit lapsed members (email, call)
- Use as member retention tool
 - “We compile lists each month of members who are due to lapse and reach out to explain the benefits of renewal.”
- Use to create a monthly Board report for retention, lapsed stats
 - “Any new, renewing or lapsed member is presented to the board so that if someone has a relationship with them, they can personally reach out.”
- Note membership anniversaries
- Chapter disbursement report (upload to QuickBooks per tax code)
- Compare, reconcile, align AFP Global/chapter data, member info
 - “Membership Reports are used with caution since we have more accurate data based on our contacts and updates directly from members. Membership Reports need HUGE changes in accuracy, accessibility on website and updates.”
 - “Analyze past efforts but it's hard to use to project for future plans because the data seems to be lag current information, e.g. if someone renews membership but they're listed as lapsed for a month until the data is updated. “
- Analyze chapter membership trends
 - “We use them to build a monthly dashboard report to track and compare the data monthly & annually.”
- Use to populate member directory on website
- Match dues reimbursement report to record dues received by membership type
- Update spreadsheets to then upload to third-party platforms/databases (if chapter uses)
- Use reports to better understand the density of members in particular regions
- Use to check current member status for chapter activity billing purposes (member rate vs. nonmember rate)
- Use to check event registrants who claim to be a member but of a different chapter

➤ ***What Would Improve Your Current Member Data/Tracking Experience:***

Representative responses:

- A “global” data system we can all use that is real time and has email capability that captures open rates, etc.
- Having real-time updates to membership data would save valuable time and ensure accuracy of membership information. Greater ability to segment, track and manage donor relationship, notes from those conversations, track volunteer roles, etc.

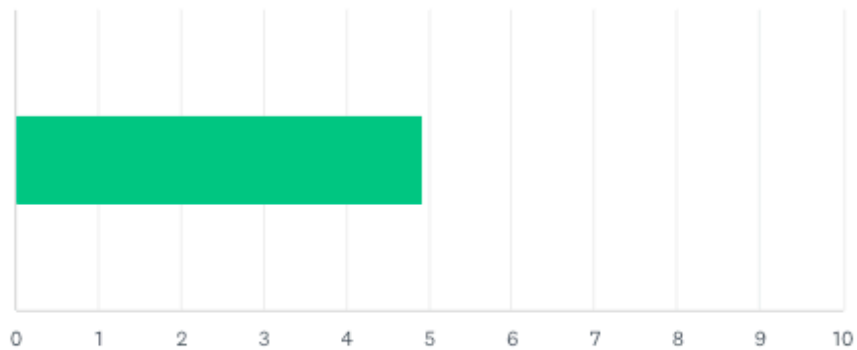
- “I would really like to know when a member moves organizations. The member might not contact me to let me know and it would be time consuming comparing spreadsheets month to month to find those that changed jobs or positions.”
- “I would like to be able to have an account for each member (and lapsed member or guest attendee) and track them like donors. I too have a fundraising background, so think that each event attendance counts - if someone shows up, I want that in their record - it could help us better identify board members, member value, which programs aren't worth the effort, how much folks are willing to spend, etc.”
- “Better ability to track non-members, as they constitute the majority of people engaging with our chapter. We want to cultivate and educate more of them so they eventually join, but we can't track them very well.”
- Integration of member demographics, event registration and attendance (at both the chapter and global level), email analytics, and website tracking
 - “We would like more accurate information regarding demographics so we can focus on the recruitment of members to improve community representation. The information requested of members is most often not completed, such as organizational size, average gifts received, and having that information to know that we have a wide representation of organizations in our chapter would be helpful. We have focused a lot of our energy is training members on how to navigate their membership portal on the website to update their data, make their information visible on the website, and even how to navigate all of the benefits of membership.”
- The ability to update AFP Global records ourselves, and to be able to add in specific fields that might be helpful for our chapter (e.g., Founding member)
 - “If everything were in one platform, it might be easier but the chapter would need the ability to tailor fields and formatting of the platform to their needs AND capture robust information on prospects and lapsed members.”
- Ability to track sponsors and donors (actual and potential)
- Note and track chapter Board and committee activity
- A database that integrates with our website and email marketing platforms like MailChimp to allow greater personalization
- Greater event registration integration and functionality – confirmations and reminder to all registered, attendance rosters, etc.
- Ability to access and pull reports on individual records, and run/design ad-hoc queries.

Section 2: AFP Global Database Information and Reporting

➤ *Satisfaction with AFP Global-generated Reports and Member Information:*

What is your overall satisfaction level at this point in time with your AFP Global-provided chapter reporting and membership information? (1 = “The data is a mess and reports don’t work”, 5 = “It’s All Serviceable But Not Exactly What We Need/Want”, 10 = “It’s All Perfect”):

Answered: 74 Skipped: 33



ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
Responses	5	364	74
Total Respondents: 74			

Sample Comments to the above (not already noted in previous questions/answers):

- The current data is difficult to access and does not contain robust demographic information
- It’s serviceable but limited and cannot be modified or enhanced
- Accessing the chapter membership reports on the global website is not easy especially if you are not using the correct web-browser. It should be a simple click of the button
- If we want to see membership information + event attendance, we have to run two separate reports in two systems and do a comparison
- We need to be able to customize and include info at the chapter level. It would be beneficial for the chapter and global to have unified data

- When communicating with lapsed members, it's nice to let them know when their membership expired. We don't have access to that information anymore. We can't update our member's information and often requires a friendly reminder to have global update
- Not being able to track our non-member/prospect list through AFP Global's database leaves us to our own devices to create a hodgepodge system locally
- It would be nice to have a database that would allow to simply type in a member's name and get all of their information
- The information is there and the data almost always loads well. There is a good amount of information available. It is just not easy to analyze in spreadsheets - it is not intuitive
- Downloading the reports is straightforward enough but there is little flexibility in what we can get (outside of date ranges), they are only spreadsheets - actually manipulating or using the data requires either spreadsheet knowledge and skill (that the membership chair may or may not have), significant time to manage and manipulate, and no way to easily track the data we also want to use and track
- AFP does not do enough to collect augmented data, nor does it encourage members to provide enhanced data to their profiles. Members find the online system difficult when wanting to update their profile

➤ *Pain Points with Current Reporting Access/Process:*

Representative responses:

- “Clunky” is the word most used to describe current report access and process. Also described as laborious, tedious and time consuming
- Shared generic admin login access to reports not secure – should be tied to individuals
- Currently need different logins to access chapter reports, Foundation Be The Cause reports – confusing – needs to be unified
- Should be on-demand and/or regular training available on how to access reports, how data access/maintenance works
- Report formatting not easy to use, understand – needs to make simpler, more intuitive, editable
- Need more at-a-glance graphic dashboards for member information
- No way to customize, filter reports
- No way to preview reports before downloading – can only see information once downloaded
- Too many steps to run simple reports, leads to more possible break points/issues
- No lapsed member report is an issue – forces chapters to now compare reports to find this information
- AFP Global information not current compared to chapter's info
 - “Many times members will attend our events and give us their most up to date contact information so we go by that data and NOT what is in Global's database because they often forget to log into Global's database to make those updates as

they occur. There are also organizations that pay for memberships from a corporate foundation address, for example, so members' addresses reflect that address and not the true address where they work. This is why we rely on our database records more than Global's in some cases.”

- Need to run each report separately is annoying – should be able to have a one-click option to access/download them all at once

➤ *Gaps in Current Member Data:*

Representative responses:

- No way to find out how long someone has been a member of AFP or how long a fundraising professional
 - “Would like to see active membership years for on-again off-again members - they seem to be new or lose the years from before the gaps.”
- Event participation on national, chapter level
- Interest areas/affinity groups they belong to
- No way to pull by distinct member types
- No way to pull non-member prospective members in chapter’s area/region
- Need distinct lapsed member data – ability to in real time pull up the roster and see who lapsed/is lapsing and when, start and renewal dates, etc.
 - “We should be able to pull both current and lapsed members at the same time. That would allow us to have a clearer view of what our membership looks like.”
- Ability to see when the member last updated their profile information
- Would like to see their participatory activity on the Global and chapter levels: Mentor? Meeting participation? Scholarship recipient? Historic Board/committee participation? If they were a nominee/nominator for awards/positions?
- Ability to update member records directly in database

Section 3: Current Chapter Website/Communications Process

➤ *Pulse Check on Current Chapter Websites:*

Chapters were asked to rate their agreement level (1 = strongly disagree, 5 = strongly agree) to seven statements regarding their current website presence. Below are the results based on average:

- Is a valuable source of career information for fundraising professionals (3.68)
- Helps advance members' fundraising career (3.19)
- Has a wide variety of original content (2.92)
- Connects members to like-minded professionals in fundraising and development (2.74)
- Is an important factor in members' join/renewal decision (2.73)
- Shows members content that reflects their personal interests (2.67)
- Adds value through exclusive members-only content (2.65)
- Is a source of membership pride (2.61)

It is interesting to note that the statement “Adds value through exclusive members-only content” received the highest number of “1” (and N/A) votes, reflecting either the chapters’ unawareness of this ability to create members-only content on their AFP Global-provided websites, or the lack of such functionality on their own external sites (or also perhaps the lack of resources to develop such members-only content).

➤ *Who is Responsible for Chapter Website Maintenance?*

Overall, there is a clear lack of consistency when it comes to website maintenance, with each chapter cobbling together resources as available to handle this responsibility depending on the day-to-day demands on the office, budgetary constraints, lack of time/ability to handle, etc.

- The most comment response to this question was a variation of “one person” – usually the Chapter Admin or a designated “webmaster”, though it also fell under the “Communication” person’s responsibilities for some chapters.
- Often the “webperson” is a chapter volunteer who officially has this title, and maintains the site as the need arises.
- A number of chapters with websites indicated that there is no official “web” person in their chapter, and that any updates or changes to the website were done “by committee” – whoever was available in the membership or on a committee and able to do it when they had time.
 - Common response: “We are entirely volunteer run and as the chairs change the level of engagement with administering the website changes.”
- Larger chapters, such as Chicago, outsource all their online work (website, AMS) to an Association Management firm.

- Chapters who use StarChapter note that StarChapter handles their website updates as well as their AMS work and support as part of their package.
- Usually, website edits and changes are decided by a committee (Marketing or Communications), and then communicated to the chapter admin or a volunteer to implement.
- Technical or complicated issues are almost always outsourced to the chapter's hosting vendor.
- A number of chapters indicated that they have cut back or reduced hours dedicated to their websites over the past years as revenue and budgets have tightened.

➤ ***How Often is Website Updated?***

The results appear to indicate that just over 50% of responding chapters are updating their websites at minimum once a week, which is a good sign. Though 25% seem to only make updates once or twice a month:

- Once a week - 23.68%
- 2-3 times a week - 22.37%
- 1-2 times a month - 18.42%
- Once a month - 7.89%
- A few times a day - 2.63%
- Once a day - 2.63%
- We never update our website - 1.32%

As some comments confirm, chapter attention to their website is pretty much “as-needed” – if there is a new event or job listing, or changes to the Board, etc., then the site is updated. There is very little pro-active attention to developing or posting new content or fundraising news, with chapters believing that such creation is not their responsibility (given their resources) and more the responsibility of AFP Global.

➤ ***Member e-Communications:***

- Almost 80% of responding chapters indicated that they “use a marketing automation platform such as Constant Contact, Cvent, Real Magnet, MailChimp, etc.” to communicate with their members via newsletters and the like.
- Just over 6% rely on “personal” platforms such as Outlook or Yahoo, etc., though some chapters report using both a platform and Outlook depending on the type of message (e.g., newsletters through MailChimp, while the chapter president sends more personal membership messages from her Outlook)
- Those retaining AMS services such as StarChapter use that platform's email marketing tool to send their newsletters and emails to members.

➤ ***Chapters Using AFP Global-provided Websites:***

Of those chapters responding to the survey, 43 indicated that they use the free Higher-Logic based website platform provided by AFP Global.

- Overall Satisfaction: On a scale of 1-10 (1 = “It’s Terrible”, 5 = “It’s Serviceable”, 10 = “It’s Awesome”), the overall average came to a 5.5 satisfaction level. There is a definite polarized opinion to the sites: Almost 25% of respondents gave it an 8-10, while another 25% gave it between 1-3.
- When asked what aspects of the site presented issues, a number of critical concerns were cited (though chapters acknowledged it’s a free site and they know limitations are inherent in such a “once-size-fits-all” platform solution).

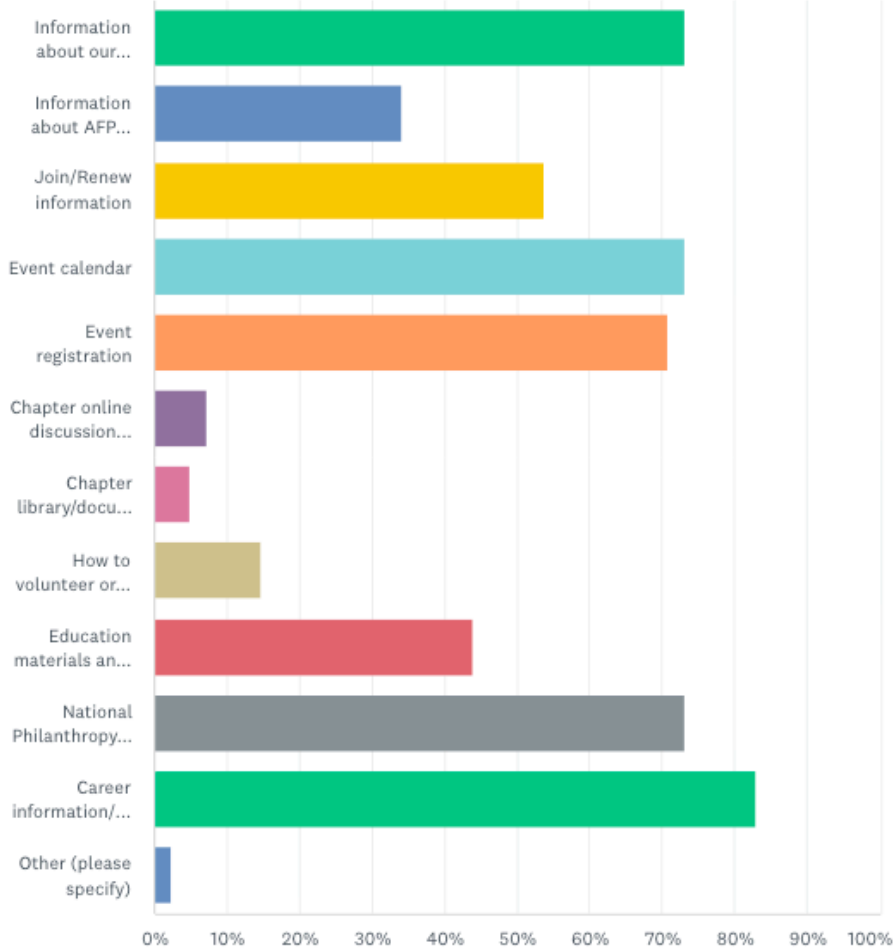
In addition, some items noted as “missing” actually exist, which reveals a communication/training gap between AFP Global and the chapters that needs to be incorporated into any new solution that is developed/delivered.

The following is a representative sample of the main issues noted:

- Lack of a photo-gallery functionality to display event photos (though chapter can easily upload photos to a page)
 - No fillable form functionality to allow chapters to set up forms
 - No fully integrated event registration (though chapters can tie a payment processor to the event registration on site)
 - Lack of event reporting and analytics
 - No event nametag printing
 - Site design seems dated, not able to customize
 - CMS is clunky and hard to use, difficult to change layouts, etc.
 - Not easy to email event registrants
 - Unable to embed videos on pages
 - Issues using vanity URLs redirecting to site
- When asked what website features they believe their members find most useful, responding chapters pointed to “career information/job board”, “Information about our chapter/contact details”, “NPD Information”, and “event calendar/event registration” as most critical:

Please check the functions/features that you believe your members find most useful on your chapter site:

Answered: 41 Skipped: 66



ANSWER CHOICES	RESPONSES	
Information about our chapter/contact details	73.17%	30
Information about AFP Global	34.15%	14
Join/Renew information	53.66%	22
Event calendar	73.17%	30
Event registration	70.73%	29
Chapter online discussion forum	7.32%	3
Chapter library/document uploads	4.88%	2
How to volunteer or participate in chapter initiatives or committees	14.63%	6
Education materials and offerings	43.90%	18
National Philanthropy Day information	73.17%	30
Career information/job board	82.93%	34
Other (please specify)	Responses 2.44%	1
Total Respondents: 41		

- When asked which key features/functions they believe are missing from their AFP Global-provided websites and why needed, chapters noted a wide variety of “wish-list” items, including a number of features that the current sites actually already have, which again points up the difficulty and gaps in AFP Global’s training and communication, especially when there is constant change and/or lack of resources and time on the chapter admin/volunteer level.

Representative responses:

- “Things I think it would be helpful for a database manager: Fully integrated event management to include registration, online payment, reports (financial, check-in lists, registration lists, name tag creation), integration with MailChimp/ Constant Contact/ Eventbrite.”
- “We would like people to be able to join on OUR website so they are not having to go through quite so many hoops.”
- “A more flexible and robust calendar and event creation/management system allowing for easy changes and updating, notifications to registrants.”
- “The ability to customize the look and feel of the website to better reflect current web design practices.”
- “More tutorials and training.”
- “Help with promotion of the website and features to the chapter membership.”
- “More ADA—forward design and accessibility.”
- “Board-member only sections.”
- “Editable graphic templates to create banners, ads for sites, social media.”
- “Integration with AFP Global content so it automatically appears on chapter sites.”

➤ ***Chapters Not Using AFP Global-provided Websites:***

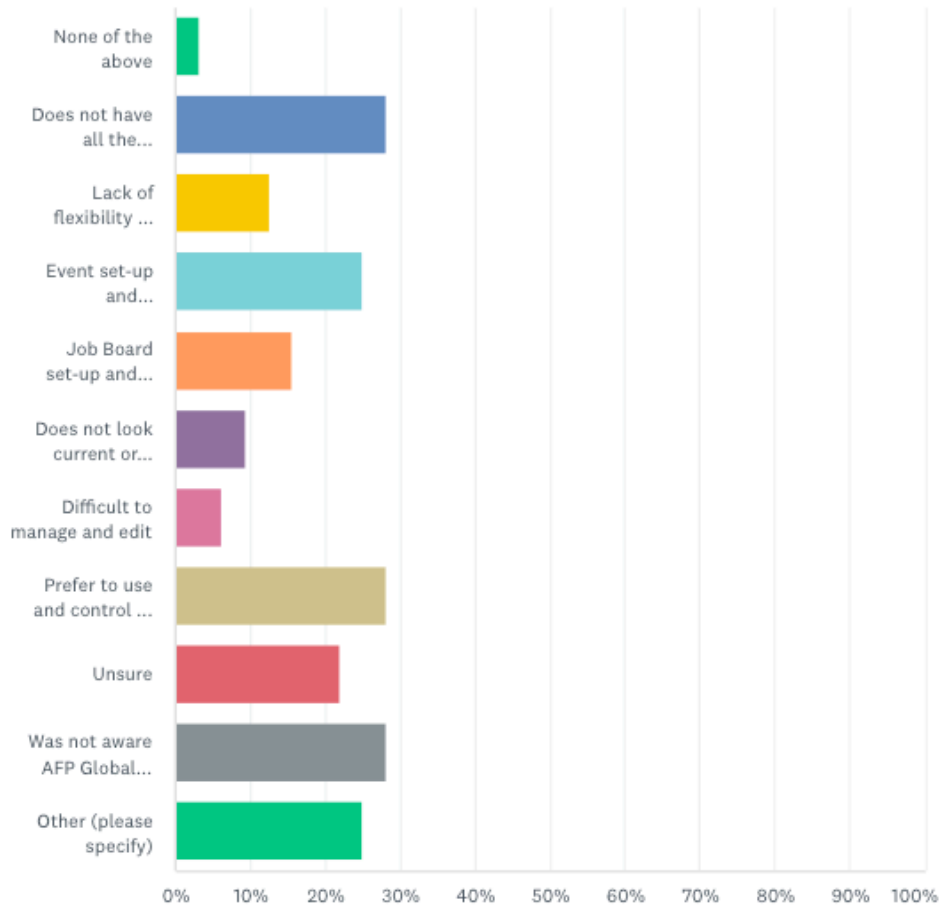
When asked the reason(s) why they did NOT use a free Higher-Logic based website provided by AFP Global, chapters pointed to a lack of features they believe they need, particularly around events, and their desire for complete control over their site. But a large percentage also indicated that they were not aware they could get a free website from AFP despite AFP Global’s regular promotion of this opportunity, but one that again points to a communication gap between AFP Global and the chapters that needs to be addressed.

Other factors noted:

- Do not like the URL of the sites
- Didn’t want to learn a new platform
- Not in French

Please select the reason(s) why you do not use (or no longer use) a free Higher-Logic based website provided by AFP Global:

Answered: 32 Skipped: 75



ANSWER CHOICES	RESPONSES
None of the above	3.13% 1
Does not have all the features we need	28.13% 9
Lack of flexibility to change template design	12.50% 4
Event set-up and registration process does not meet our needs or is inadequate	25.00% 8
Job Board set-up and registration process does not meet our needs or is inadequate	15.63% 5
Does not look current or sophisticated	9.38% 3
Difficult to manage and edit	6.25% 2
Prefer to use and control our own website	28.13% 9
Unsure	21.88% 7
Was not aware AFP Global provided free Higher-Logic based websites	28.13% 9
Other (please specify)	Responses 25.00% 8
Total Respondents: 32	

- Event Management: Chapters not using the Higher Logic platform use a variety of solutions for their event creation, registration and management, including EventBrite, MemberClicks, StarChapter, Wix, Constant Contact, etc., none of which are integrated with AFP Global's database. In terms of annual cost, the prices for this event management ranged from \$200 (Wix) to \$7,500 (AMS), with credit card processing fees (when remembered) around \$500.

Section 4: New Database/Reporting/Website Platform Requirements

➤ *Key Drivers for New Website/Database Adoption:*

- Chapters were asked to select up to five features from a provided list that would be most determinative in their decision whether to move their website and/or database operations to the new shared platform we hope to develop. The most selected feature by far was “ease of admin and editing tools”, with “event creation, registration and administration” close behind.

The top five selections:

- Ease of admin and editing tools (82.19%)
- Event creation, registration and administration (67.12%)
- Email Marketing/communications tools (58.90%)
- Job board functionality and processing (56.16%)
- Access to chapter member data via website admin (47.95%)

ANSWER CHOICES	RESPONSES	
None of the above	1.37%	1
Ease of admin and editing tools	82.19%	60
Ability to alter look and feel	31.51%	23
Responsive site, accessible on mobile devices	41.10%	30
Access to chapter member data via website admin	47.95%	35
Ability to create chapter member dashboards and reports via website admin	31.51%	23
Ability to update chapter member information and activities in AFP Global database via website admin	43.84%	32
Online forms directly tied into the database and that pre-populate based on user login	23.29%	17
Ability to add chapter-specific questions to the membership registration process.	24.66%	18
Event creation, registration and administration	67.12%	49
Chapter online discussion forum	8.22%	6
Chapter library/document uploads	13.70%	10
Job board functionality and processing	56.16%	41
Survey/poll functionality	17.81%	13
Email marketing/communication tools	58.90%	43
Training and support	24.66%	18
Live chat functionality (between website users and support)	6.85%	5
Other (please specify)	Responses	9.59% 7
Total Respondents: 73		

Other desired features/comments:

- Strong tech/helpdesk support
- Online form functionality
- “We will not move to your platform we will stay with MemberClicks, it does not matter what you would offer.”

➤ **Data-Management Preferences:**

Chapters were asked their data-management preference between using a shared/integrated database platform with AFP Global, or maintaining their siloed database solution and uploading member data to it. In general, the consensus answer was to use a shared solution, with a number of subjective qualifications, such as cost if any, ease of use, customizable reports, etc. A number of chapters indicated they would keep their current solution so a process would need to be developed to ensure a way for AFP Global to still get critical data from the chapter.

Representative responses:

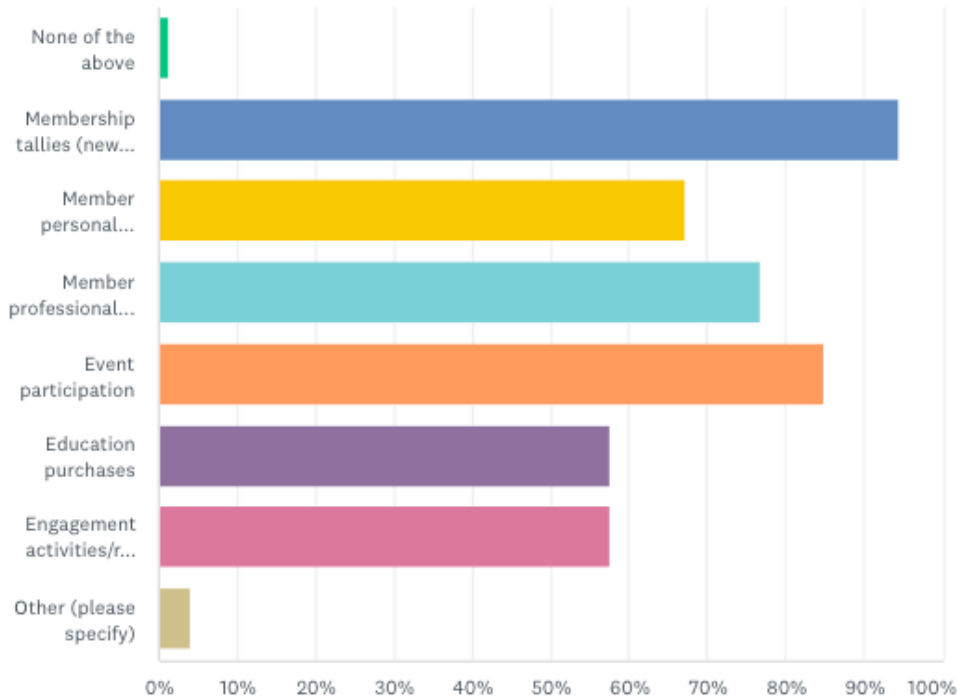
- “If it was cost effective, easy to use on the backend, user friendly for chapter member...potentially. Too many factors to answer a general question.”
- “Ideally, we would prefer to house our database locally, along with a more automated process for ensuring that membership information matches the global database.”
- “That's a good question. A shared system would be nice, but some board members may feel we need to maintain our own.”
- “Shared so long as it allows us to access real-time membership data and creation of event registration for chapter level events .”
- “Considering that we just made the investment in NeonOne after a year+ of searching, we plan to maintain our current database for the time being. We purchased this because other chapters were using it and it successfully integrated with the Higher Logic platform. NeonOne does partner with Salesforce so it is our hope that this will continue to be true. If not, we may look at our options for creating our own website or dropping NeonOne. This will be a board decision. “
- “A shared platform would be beneficial to AFP and the chapters. The chapter can collect important membership information that global would likely never get.”
- “From a cost perspective, the share/integrated database platform with AFP Global would be a good option for our chapter. That is assuming this tool will be provided for free. (I've long thought AFP Global should provide a database free to chapters.)”
- “I think an integrated database with Global would be the best way to approach this. It would be challenging and time-consuming to have to continually update the information in a separate database. Global and local chapters should have access to information as it is updated.

- “If it is all-inclusive and covers the benefits of StarChapter, then I could potentially appreciate an integrated platform so that we don't have to deal with downloading/uploading, etc.”
- “Tough question. I am so often asked to produce reports on various data points around events, attendance, breakdown of members/nonmembers, etc. This is easily done when you have control of how you set up your data and fields; not so easy if you're using a product that's meant to serve the needs of the majority of users, but perhaps doesn't include some of the important things that chapter leadership is accustomed to getting.”

➤ ***Key Reporting Data Needed:***

What type of reporting data would be most essential to your chapter's operation and success (check all that apply):

Answered: 73 Skipped: 34



ANSWER CHOICES	RESPONSES	
None of the above	1.37%	1
Membership tallies (new joins/renewals, amounts, etc.)	94.52%	69
Member personal demographics	67.12%	49
Member professional demographics	76.71%	56
Event participation	84.93%	62
Education purchases	57.53%	42
Engagement activities/ranking	57.53%	42
Other (please specify)	Responses 4.11%	3
Total Respondents: 73		

Additional responses of note:

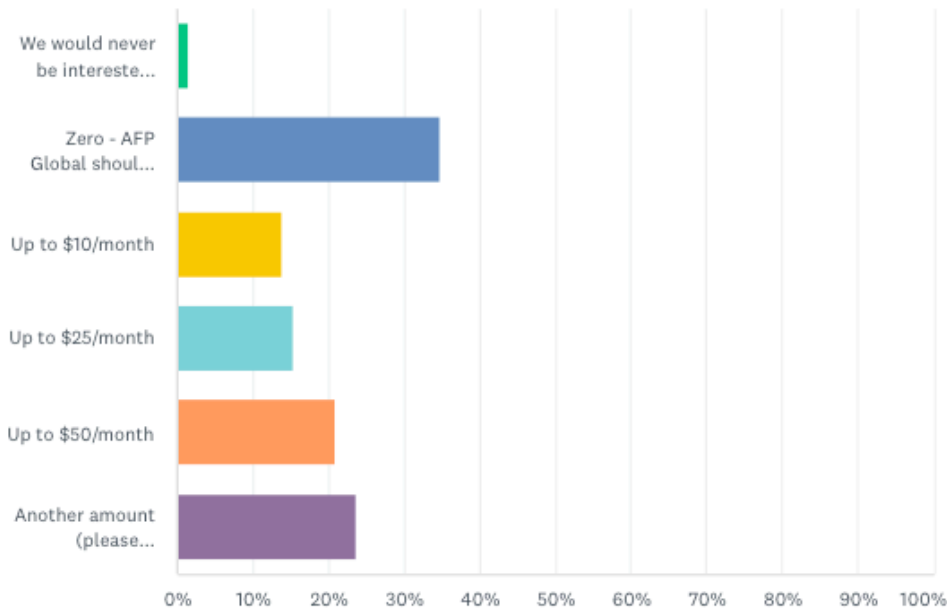
- Donation history
- Specific training and educational interests
- Social media engagement; email open rates

➤ *Thoughts on Using a Fee-based Solution:*

Though hard to answer in the abstract, chapters were asked how much they might be willing to pay as a subsidized “fee” to access an integrated database/website platform. Perhaps not surprising, the top answer was “zero” with chapters noting that this is something they believe AFP Global should be responsible for providing to them.

Knowing this is an abstract question given the early stages of this initiative, in your best estimate how much might your chapter be willing to pay as a subsidized “fee” to access/use this new platform/website solution and have integrated access to AFP Global data/reports?

Answered: 72 Skipped: 35



ANSWER CHOICES	RESPONSES	
We would never be interested in using this solution	1.39%	1
Zero - AFP Global should pay for our chapter-level database access and platform	34.72%	25
Up to \$10/month	13.89%	10
Up to \$25/month	15.28%	11
Up to \$50/month	20.83%	15
Another amount (please specify)	Responses 23.61%	17
Total Respondents: 72		

Additional responses of note:

- “All depends on whether the value is greater than what already have.”
- “We'd love it to be part of our payments, but this should be based on chapter size - we are smallish, and would not want to be charged same as large chapter.”

- "\$100 - we are paying \$125 per month which is too much."
 - "Depends on features, but it would be great to have it at \$75/mo."
 - "Anything less than what we are paying now which is \$400/mo."
- *What other "wish-list" items could AFP Global develop and make available to chapters that would significantly improve your ability to serve and gain/retain members?*

Representative responses:

- "Standardized Registration/Payment processing for chapter and global events."
 - "Access to real time data and integration of reporting so we can 'personalize' outreach to our members."
 - "Customizable website/database - willing to purchase additional add on."
 - "Pulling individualized list such by credential, location, demographic, etc."
 - "Engagement reports based off of registrations."
 - "Better integration between AFP Global and chapter websites (look, feel, content)."
 - "If we could use platform for event registration, eliminating need for Cvent and use for email communication, marketing, monthly newsletter, eliminating need for Constant Contact, that would be the best situation. The new platform will be our one stop for all our chapter's needs."
 - "Ability to include sponsors and sponsorship donation tracking/reporting."
 - "Be able to budget within the database."
 - "Track board engagement/attendance, event attendance."
 - "Track volunteer engagement, prospect engagement (notes section)."
 - "Broader marketing of the AFP membership in communities that are not home to an AFP Chapter. It is unreasonable to expect us to capture and maintain prospective memberships in areas that have nonprofits we could serve but we are not."
 - "Event tracking, especially for NPD."
 - "Database and report access based on membership type, board position, etc."
 - "Automate sending new/renewed/lapsed reports to membership chairs, chapter admin, and presidents on a monthly basis."
 - "Perhaps quarterly all chapters should upload their education programs to Global for the chapters to then have access to."
 - "Monthly list of members that didn't renew so we could reach out to them personally."
 - "Interactive chat functions on the Global and local sites."
 - "Given the turnover on the board, services that are turn-key so new board members can come in and use them."
- *Other Noted Thoughts and Observations:*
- "Please provide chapters a fully-funded AMS with the ability to maintain websites, unique member information, event registration and manage system at the chapter level."

- Training & Support: “We expect that if we are on the Global platform, we will get all of the training and back-end support needed to maintain an accurate database and website solution.”
- “The database would be an easy decision, integration with the website, ease of use/editing, all of the bells and features we want, ease of use for members, etc. and cost would be determining factors.”
- “Information on certain pages would automatically update to the home page or other pages as needed. Duplication of information is time consuming.”
- “All the same features we are getting at a lower cost than what we currently pay.”
- “Must be mobile friendly for users, admins.”
- Understanding the time and training that it would take to move to a new database and website.”
- “Proof of concept on stability and usability, perhaps recruit a beta test group and share positive results --Needs to be cost-effective based on value provided with full scope of services (database, website, email marketing, event registration). “
- “We are very happy with our website through Squarespace (launched in Feb 2021) and are not interested in changing it. It is extremely user-friendly and customizable. We are extremely interested in moving forward with a database and would be happy to participate as a pilot if this is an option. “
- “A robust job posting service. Job postings are the largest source of revenue for our chapter and anything that can enhance this service would be appreciated.”
- “Honestly, this is just frustrating. We spent over a year, including my time as both a volunteer board member and then paid administrator, launching this new website and then another year finding an AMS to only find out that it is all changing again and we have no idea how it will impact our chapter. In a time when we are focusing our energies on building our membership and reserves that were depleted by the pandemic, I am not sure how receptive the board will be when it comes to starting all over again.”

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