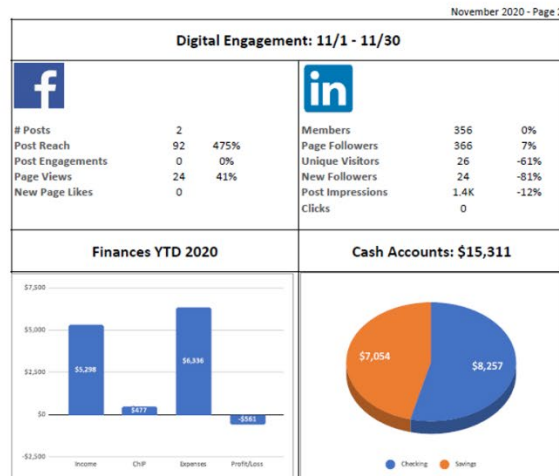
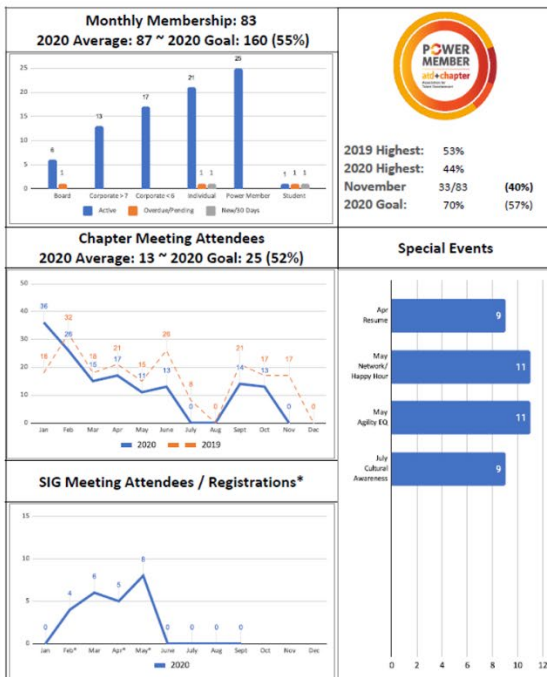


Score Card Procedures

This Score Card helps the Greater Las Vegas chapter monitor targets and track CARE requirements for:

- Membership
- Power membership
- Chapter meeting attendance
- Social media digital engagement
- Finance results
- Cash Accounts

ATD Greater Las Vegas Score Card: November 2020



It was created in 2017 by our Past President as an Excel workbook. Currently, the VP Finance is responsible for creating and distributing it before monthly board meetings. It was converted to Google Sheets in 2019 for the chapter Google Drive so appropriate board members could enter their information each month. Previously, the information was sent by email.

Recent enhancements: added the prior Chapter Meeting attendance to track trends, plus Special Events, SIG meeting attendance, and expanded the Digital Engagement statistics.

The Score Card details are tables and cells linked to other Sheets in the file:



FINANCE Sheet

These fields are linked directly to the Income Statement – a separate Google Sheet tracking financial transactions from the monthly bank statement, plus year-to-date total with variances against budget (will provide separately upon request). Links must be adjusted if line items are added to the Income Statement. Otherwise, this information automatically appears on the Score Card.

Cash Accounts: \$15,311		
Checking	\$8,257	
Savings	\$7,054	
	\$15,311	\$15,311
Finances YTD 2020		
Income	\$5,298	\$5,775
ChIP	\$477	
Expenses	\$6,336	
Profit/Loss	-\$561	

We added SIG Meetings or Registrations (if attendance wasn't taken) and Special events in 2020. Will add previous SIG attendance for 2021 (like Chapter Meetings).

SIG Meeting Attendees / Registrations*	
	2020
Jan	0
Feb*	4
Mar	6
Apr*	5
May*	8
June	0
July	0
Aug	0
Sept	0
Oct	
Nov	
Dec	
Special Events	
	2020
Apr Resume	9
May Network/ Happy Hour	11
May Agility EQ	11
July Cultural Awareness	9

MEMBERSHIP Sheet

This sheet is the most complex. First, the VP Membership copies the previous month in the appropriate area (prior years are maintained as well), then updates the information on the day National sends the Membership and Power Membership (PM) information (usually around the 15th of the month). Since we have corporate memberships, the Power Membership data is reconciled with Wild Apricot on that day (otherwise delays can cause discrepancies). Example: even though we had 33 Power Members, Wild Apricot only shows 25 because the other PM numbers are either board or corporate members.

Nov 2020	Active	Overdue/Pending	Lapsed	New/30 Days	PM	PM %
Board	6	1				
Corporate > 7	13					
Corporate < 6	17					
Individual	21	1		1		
Power Member	25					
Student	1	1		1		
Total	83	3	0	2	33/83	40%

When this information is ready, the VP Finance transfers the data into the area in the top-right of the sheet (this is the information that appears on the Score Card). Items in yellow are changed monthly, other fields are updated annually.

Monthly Membership: 83		(change values annually)				Goal	Average	November	2020	2019
2020 Average: 87 ~ 2020 Goal: 160 (55%)						160	54.55%	55%		
November 2020	Active	Overdue/Pending	Lapsed	New/30	PM	PM %				
Board	6	1								
Corporate > 7	13									
Corporate < 6	17									
Individual	21	1		1						
Power Member	25									
Student	1	1		1						
Total	83	3	0	2	33	40%				
Power Members (change years annually)										
2019 Highest:	53%									
2020 Highest:	44% (February)									
November	33/83	40%								
2020 Goal:	70%	57%								

The VP Finance then enters the Membership and Power Member data at the top of the sheet (which impacts other formulas).

2020	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Avg
Joint Membership Percentage	43%	44%	39%	37%	41%	38%	39%	39%	38%	39%	40%		40%
Power Members	38	43	39	32	35	32	33	32	32	33	33	33	35
Total Chapter Membership	89	98	99	88	85	83	84	82	85	84	83		87

SCORE CARD Sheet

Follow up with VP Membership and VP Social Media as needed. When all the information is entered, check the Score Card sheet to make sure all tables appear correctly. If not, click the table to re-establish the connection. If data elements are incorrect, adjust the data on the appropriate sheet.

Once final, print the score card to keep with the monthly financial records. Also, save as PDF to post in the appropriate monthly folder of the Google Drive.

The Score Card PDF is then distributed to board members before the monthly board meeting. During the meeting, the Score Card is displayed while the VP Membership, VP Social Media, and VP Finance share the monthly results and answer questions.