



Annual Membership Survey Template Job Aid

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ATD NATIONAL ADVISORS FOR CHAPTERS (NAC), MEMBERSHIP TEAM

ABOUT THE ANNUAL MEMBERSHIP SURVEY TEMPLATE

This job aid is designed to help chapters develop and administer an annual survey to distribute to their membership. Annual surveys are a [Chapter Affiliations Requirement](#) (CARE) element, and using them well can help your chapter in many ways, including providing data to inform your chapter's operational plan (CARE Element 2.1). Having a strong annual survey can help your chapter become 100 percent CARE achieved while collecting important data that can improve the member experience.

HOW TO GET STARTED

Review the annual survey template questions. Identify which questions are important to ask and which ones may not be important to your chapter. Pay attention to the rationale for asking each question as well as the tips to help you incorporate them.

Review any previous surveys your chapter has administered. This will help you identify additional questions you want to incorporate, as well as any redundant questions that may appear on both the annual survey template and your chapter's survey.

CUSTOMIZING YOUR SURVEY

Customize your questions. Customize the survey to reflect your chapter's offerings and benefits. Add your own questions based on your chapter's individual needs, if necessary. If you are surveying the membership anonymously, make sure to include demographic questions: years in the field, age, gender, ATD membership, how many years as a chapter member, etc.

Include space for comments on questions. Consider including a space for feedback after some or all of your survey questions to collect additional insights from your members.

Add a space for overall comments. Consider adding an open response section at the end of the survey. Asking them, "What else do you want to tell us?" can provide some great information that may not be captured elsewhere in the survey.

Order your questions according to your needs. Based on your customizations, organize your survey questions so that similar questions are grouped together and flow in a logical way.

CREATING AND DISTRIBUTING YOUR SURVEY

Select an online survey tool. Research and select an online survey tool that will allow you to format your survey questions and collect data. Some survey tools recommended by ATD chapters include [Google Forms](#), [Survey Monkey](#), and [JotForm](#).

Include a statement about how data will be reported. Consider closing your survey with a statement about when and how you will report data to your membership. That will help members understand how their responses will make a difference and when they can expect more information on how the data will be reported or used by the chapter.

Send a survey to both members and nonmembers. You are encouraged to send out a different survey to nonmembers and use the data collected to convert respondents to members.

REVIEWING AND REPORTING DATA

Commit to sharing your results with your membership. Survey results can be shared on your chapter's website, through your annual report, or at a chapter meeting.

Include your full board in the data review process. Work with your board to ensure everyone has a role in reviewing and discussing the data that come in through your survey. This helps your board to have ownership over the survey process and understand how the information affects everyone's work.

RESOURCES

[Membership survey template.](#)

For additional information, contact your [Chapter Relations Manager \(CRM\)](#).
