Digital Analytics Association
Chapter Handbook

Last Updated December 2019

A.   Welcome Message

Congratulations! By organizing a Digital Analytics Association (DAA) chapter you are extending the reach of DAA to better educate and inform your colleagues in the profession of digital analytics. We commend you on your commitment and joining us in promoting the digital analytics profession.

As a local organizer, the volunteer hours you spend conducting local chapter business will certainly benefit the association as a whole. At the same time, your volunteer work will also enrich your own professional standing by enabling you to:

   a. develop skills you can use in business,
   b. become more involved in the local community,
   c. network with like-minded individuals,
   d. further your own career while helping other local members do the same, and
   e. encourage knowledge-sharing through educational programs.

The DAA wants to make starting and operating a chapter as easy as possible, therefore the association will work with members to build strong and successful chapters. At their core, though, chapters are local groups run by local members; the ongoing activities will be in the hands of local organizers. The DAA has developed tools to help in the starting and operation of a chapter, which will be explained in this guide.

Chapters are extensions of DAA. You have the power to plan and conduct your own activities using your knowledge of the local industry and area. Your enthusiasm and drive will sustain your local chapter over time. Because chapters are part of DAA they need to operate in partnership with DAA staff, within the broad framework - and toward the same HQ objectives - as the main body of the DAA.

The chapter structure created by DAA may or may not be similar to your previous experiences with similar organizations. We urge all local leaders to become familiar with all sections of this document to ensure there will be smooth operations. DAA staff is ready to answer any questions and provide guidance.

Again, our sincere congratulations and thanks,

The DAA Board of Directors

B.   Handbook Overview

a. About DAA

  i. **Vision** - A better digital world through data.

  ii. **Mission** - Advancing the use of data to understand and improve the digital world through professional development and community.

b. Purpose of This Document

  i. The purpose of the DAA Chapter Handbook is to provide chapter leaders with a central place to find information about starting a chapter, organizing a chapter meeting and many other topics that come up in the course of running a chapter.

   While there are a few rules that chapter leaders must follow, this handbook is primarily composed of suggestions and best practices that have worked for other successful chapter leaders.

   What works for some chapters may not work for others, and this handbook should not limit the scope of possibilities for running a strong and thriving chapter. This document is subject to change from time to time to reflect any related policies adopted by the DAA Board of Directors and other evolving adjustments to the Chapter program.

C.   Organizational Policies

To better achieve its mission of leading and fostering the interests of all involved in digital analytics, the DAA resolves to extend its educational outreach and professional networking through the organization of local chapters. Under the leadership of the DAA, local chapters are intended to support and enhance DAA's role as the leader in education and to promote the DAA, its objectives, activities and programs.
The primary purpose of the chapters is to increase member value and membership.

a. DAA Chapters

i. A local chapter is an extension of the DAA, the advocate for digital analytics - and now it's right in your hometown. Think of it as an educational branch of the association.

Because chapters are actually part of the DAA - not separate organizations - local organizers can avoid the hassle of incorporating, obtaining IRS determination as non-profit, filing taxes (even if a non-profit does not pay taxes it still has to file a return), other government reports, and obtaining insurance. This ensures that chapter leaders are protected from liability issues as long as they are acting in good faith. This arrangement makes it as easy as possible for members to run local chapters.

Along with the numerous advantages of being part of DAA there are a few important obligations. Chapters are expected to follow DAA's regular policies and procedures and abide by DAA's chapter policies described in this document.

ii. **Chapter Purpose**
1. Provide a link at the local level between members, the digital analytics community at-large and the DAA's programs and services.
2. Give those who are in the digital analytics industry or who are interested in it an opportunity to meet, learn and share their knowledge and experiences.
3. Raise awareness for and promote the DAA and its mission.

iii. **Chapter Expectations**
1. Chapters must operate within DAA's regular policy and operations framework and are expected to follow all regular DAA policies including how a chapter operates, handling of funds and payment of invoices.
2. Create a welcoming environment for new and potential DAA members.
3. Hold regular meetings at convenient times and in accessible locations - minimum 2 times a year.

iv. **Chapter Goals**
1. Number of chapter members is either growing or stable
2. Members express a high degree of satisfaction about chapter activities and programs
3. While two (2) is the minimum number of chapter meetings you need to hold, four (4) meetings a year is a recommended goal to maintain an active chapter. There are a variety of meeting "formats" or events that may be used to fulfill this requirement,

including virtual meetings or even small gatherings to discuss digital analytics. Possibilities for meeting formats and events are discussed more below.

     v.   **Chapter Oversight**
1. Organizationally, DAA chapters and chapter leaders fall under the direction of the DAA Board of Directors.
2. The Board of Directors will review and approve all chapters.
3. Each Chapter will be assigned a board liaison who will assist the chapter from a strategic perspective.
4. The Board of Directors will review all existing chapters once a year to determine whether chapters are meeting the minimum requirements and expectations.

D.   How To Start A Chapter

  a. Getting Started
     i. Level of Interest
Chapters need a substantial number of local members to be sustainable. Local organizers must start by working with the DAA Executive Director to assess whether there is sufficient interest of DAA members in their area. The DAA Board of Directors has the authorization to determine whether or not a local area will support and sustain a chapter.
1. Reach out to the DAA to inquire. Email info@digitalanalyticsassociation.org.
2. DAA runs data to see how many members and non-members are in the area.
3. A survey is created to determine interest.
4. If sufficient interest with members in the area, DAA will work to form the Chapter Leadership team for approval by the Board of Directors.

     ii. Time Commitment
It is important that leadership team volunteers clearly understand that a commitment of their time is crucial as a Chapter Officer - see role descriptions below for more detail.

  b. Formation and Organization
     i. Application Process
1. Potential Chapter Leaders are asked to review Chapter Handbook
2. The leadership team who intends to start a local chapter must apply for a chapter charter by submitting a Chapter Application Form.
3. Each chapter is individually approved and chartered by the DAA Board of Directors.

4. Once authorized, a chapter charter will be valid for two years and automatically renew unless cause for ramifications (see ramification section).

    ii. Org Structure

1. Elect chapter officers (see roles below).
2. Submit Chapter Officer Agreements - a minimum of three chapter officers agreements must be submitted to the Executive Director for approval by the Board of Directors upon inception.
3. All members of the leadership team as well as additional local chapter volunteers **must be DAA members in good standing**.
4. For consistency purposes, all DAA Chapters must be named as follows: "DAA (name of city/region) Chapter" in all references.

E.   Chapter Governance

a. **Chapter Officers**

The chapter's leadership and commitment is important to ensuring a strong chapter, providing educational and professional opportunities to local members and to helping further the DAA's mission. Without members volunteering their time and leadership, local chapters would be unable to function.

    i. Officer Guidelines

1. We recommend a minimum of three (3) elected officers, a President, a VP of Marketing & Membership and a VP of Education & Events - see full job descriptions below. Additional officers may be added at the discretion of the Chapter.
2. Chapters shall not have more than one chapter officer from the same employer.
3. No member shall hold more than one office at a time.
4. DAA recommends Officers meet monthly in-person or by phone.

    ii. Elections

1. General
   a. The election process is a requirement of all Chapters.
   b. Chapter elections offer all members the opportunity to serve and encourage participation within the local chapter.
   c. The Chapter should establish and communicate a process for nominating officers (see suggested process below)
   d. All chapter members should be informed of the process and given an opportunity to nominate officers.
2. Qualifications
   a. Strength of character, leadership, professionalism, positive attitude, communication skills and the ability to volunteer time and service should be considered when nominating and electing local chapter officers.

b. Nominees should uphold high standards, be ethical, maintain integrity and demonstrate a keen interest in the success of both the DAA and the local chapter.

c. Nominees should reside in the Chapter's geographic area

d. Nominees must be current, active DAA members

e. It is recommended that officers represent diversity in company, skills, knowledge, background, race, gender and ethnicity.

3. Election Process

a. Elections occur in May/June each year so that announcements can be made at each Chapter's annual meeting in June/July.

b. It's recommended the organizing members of the Chapter should designate one member to Chair the election process. It is also recommended that the Election Chair seek two additional chapter members who are not running for an office to form an Election Committee to assist in conducting the process.

c. DAA staff will issue an email "call for nominations" to all Chapter members in good standing for the offices to be filled. Approvals and additional communications will be completed by the Election Committee.

d. The call for nominations will request a brief bio, the office to which the member seeks election and a brief statement.

e. DAA staff and Election Committee will post nominee profiles to the DAA Chapter Community forum.

f. Members may self-nominate.

g. A member can only accept the nomination for one officer position.

h. Nominees must review and accept Handbook prior to being put on the ballot.

4. Voting Process

a. Voting is private and completed online with individualized links created by DAA staff. Ballots will be tallied by DAA staff.

b. Officers shall be elected by a majority vote.

c. Here is a sample online chapter election ballot form that DAA staff will create.

iii. Duties of Officers

1. The roles below are recommended for a Chapter with three (3) officers. It is possible to elect additional officers and divide the roles of VPs. If there are additional officers, the roles should be well defined to share the duties.

2. President
    a. Total time may average up to 6-8 hours per month, including attending DAA Chapter events.
    b. Serves as main contact with the DAA
    c. Ensure that the VPs and their committees are active and functioning.
    d. Monitor financial status of events.
    e. Monitor overall chapter metrics.
    f. Attend and run chapter leadership calls.
    g. Organize monthly calls of the chapter's officers; take notes and assign action items
    h. Volunteer recruitment and training
3. Vice President of Marketing/Membership
    a. Total time may average up to 6-8 hours per month, including attending DAA Chapter events.
    b. Lead the membership committee and ensure tasks are delegated to the committee members. It is recommended you have 2-3 Committee members to help share the workload.
    c. Welcome new members in the DAA Community.
    d. Encourage prospective members to join DAA.
    e. Promote the chapter and DAA:
        i. Booth duty at your Chapter events and DAA partnered events as the opportunities arise.
        ii. Talk to universities.
        iii. Attend other organization's local events.
        iv. Introducing potential corporate prospects to DAA HQ for Corporate Membership.
    f. Share meeting content, notes, actions with DAA Community, if applicable
    g. Event Partnerships
    h. Event Sponsorships
4. Vice President of Education/Events
    a. Total time may average up to 6-8 hours per month, including attending DAA Chapter events.
    b. Ensure there are regular meetings; minimum of two per year, suggested four per year
    c. Lead the education/events committee and ensure tasks are delegated to the committee members. It is recommended you have 2-3 Committee members to help share the workload.
    d. Coordinate with DAA HQ by filling out event submission form for posting events to DAA website, DAA Community, social media, etc.

   e. Sourcing speakers
     i. Speaker logistics (slides, welcome, introductions, etc…)
   f. Securing venues
     i. Food and beverage
   g. Event Agendas

  iv. **Term Limits**
   1. Officers shall hold office for a term of one year, after which the officer can be re-elected to subsequent terms, for a maximum of four consecutive one-year terms in that role.
   2. Officers who have reached their term limit may be elected to another officer position should they choose to continue having a leadership role.
   3. If an Officer steps down or is removed from their position, the remaining leaders should work with the DAA HQ to replace the departing Officer's seat. The replacement Officer is not automatically awarded a 1-year term. That person takes over the term limit from their predecessor and may run for an Officer role in the annual election.

F. Committees

 a. **Chapter Committee Volunteers**
  i. The purpose of these roles is to ensure equal distribution of work among volunteers.
  ii. Officers should actively recruit volunteers. The Chapter Officers should not be the ones doing all the work.
  iii. Identifying these roles in advance allows everyone to prepare for their deliverables.
  iv. Committees provide opportunities for volunteers to actively participate in the chapter in ways more than just being a passive member.
  v. Committee members must be members of the association, which is a networking benefit of membership.
  vi. Organization within the committee can be customized to fit the chapter needs.
  vii. Members can serve on as many subcommittees as desired.
 b. Recommended committees and examples:
  i. Membership/Marketing
   1. Organize a subcommittee of 3-5 members to organize chapter marketing (managing social media & coordinating with DAA HQ for announcements) and membership acquisition (welcoming/acquiring members, promoting membership at events etc.)

      ii.   Education/Events
          1.   Organize a subcommittee of 3-5 member volunteers to organize events. A new subcommittee can be organized for each event, or the subcommittee can remain in place over a period of time for all events.

c. Additional committees:
      1.   Chapter leaders are empowered to create any committee under their leadership that they need or that there is interest in creating. For example, there may be domain/topic specific committees (AI, diversity, education, partnerships, etc.).
      2.   DAA HQ will work with Chapter Officers to establish a symposia committee.

G.   Finances

a. Funding

Chapters are expected to be self-supporting financially, with some support from DAA HQ. All chapters can access $250 per quarter from DAA HQ to host and help subsidize a local event. Chapters are encouraged to use their quarterly investment from DAA HQ ($250) to support the local analytics community through education, professional development, networking, etc.The $250 per quarter does not carry over. Funds not used are reallocated to the DAA HQ to continue supporting chapter and chapter leadership. Chapters should strive to host one event a quarter. Additional funds for your local event can be generated through sponsorships or registration fees or a combination of both. The goal is for the chapter to have events that are net positive or net zero, not a loss. Note that special funding exceptions can be considered on a case-by-case basis by the DAA HQ. There is a budget template in the Chapter Leader Community Library you can use to track the revenues and expenses of your event.

b. Currency
      i.   DAA HQ is based in the USA and all funds are in USD.

c. Use of Funds
      i.   Suggestions for effectively using the $250 quarterly investment from DAA includes:
- Space/venue rental
- Food & beverage
- Nametags, pens, event signage
- Collateral
- Speaker gift(s)
- Door prizes
- Thank you notes for speaker/sponsors

d. Accessing Funds
      i.   Chapter leaders can pay for the up-front costs and submit an expense reimbursement form to DAA. The most up to date form can be found within the Chapter Leader Community.

ii. Alternatively, an invoice can be provided to DAA for inclusion in payables on a monthly basis.

e. Membership Benefit

i. DAA chapters are open only to DAA members. Non-members can be invited to chapter events for the purpose of learning more about DAA but they must be charged a higher event fee than DAA members. Current DAA members may join any chapter without any additional dues. Individuals must keep their DAA membership current in order to remain a member of the local chapter. New DAA members are automatically added to the appropriate chapter by DAA HQ.

f. Event Registration Fees

i. In addition to obtaining sponsorships, chapters should charge registration fees to cover the expenses of conducting programs and events. Fees charged to attend chapter events are determined by the local organizing committee.

ii. **Non-Member Registration:** Non-members of the DAA are welcome to participate in chapter programs but the registration fee for a non-member should be at least 50% higher than for DAA members. For events which may be free to DAA members, it is recommended that there be a fee for non-members. An event may be entirely free, for example if it is an event for membership recruitment purposes or the expenses are completely covered by a sponsor(s). Charging helps prevent no-shows.

iii. **Online Registration:** To avoid long lines at meeting check-in table, it is best if attendees register for Chapter meetings in advance by utilizing the DAA web site. For unregistered attendees who walk-in, chapters should have a laptop connected to the internet and have attendees register at the door using the DAA event registration system for that meeting. Another advantage to encouraging advance registration is it helps Chapter Leaders plan better for appropriate food and beverage estimates.

iv. **Discount Codes:** Chapter Leaders can request discount codes, such as for sponsors, at the time of event set-up. As gratitude for your volunteer efforts, Leaders can attend their Chapter events at no cost.

g. Sponsorship

i. For local events, local Chapter Leaders can determine how much to charge for sponsorship. (Sponsorships for symposia will be handled by the DAA HQ office in conjunction with the local Chapter leadership and its overall sponsorship program.)

ii. Agreement: A sample agreement can be found in the Chapter Leaders Community Library.

iii. Invoicing Process: Once a sponsorship is sold, inform DAA HQ of the sponsor name, address, amount, benefits, and the date of event. If you have a sponsor determined prior to submitting the event form to DAA, there is a sponsorship section to input these details. An invoice will be

generated by DAA and provide to Chapter Leaders to submit for payment by sponsor.

    iv.   Guidelines to Benefits for Sponsors

1. Free tickets, depending on the cost of sponsorship. It is recommended that less than 10 discount codes be provided for a sponsor.
2. Exhibit table
3. Collateral - it's recommended to encourage sponsors to provide a door prize, which sponsors could use to collect business cards
4. Signage
5. Introduction of speaker
6. Speaking opportunity (keep it short, and encourage sharing of thought leadership vs. selling)
7. Logo on screen, event listing, and invitation emails

H.   Chapter Meetings

a. Annual Meeting of Members
    i.   Purpose of this meeting is to announce the newly elected Chapter Officers
    ii.   Must occur between June 1 - July 31 following DAA HQ announcement of newly elected Chapter Officers.

b. Leadership/Committee Meetings
    i.   Invitations
1. It is recommended that the designated Officer or committee chair distribute a calendar invite to all meeting participants by email at least 1 week in advance.
2. Invitations should include location and/or dial-in information and meeting purpose

    ii.   Agendas
1. It is recommended that an agenda be emailed to attendees at least 24 hours before every meeting, whether being conducted in person or by phone.
2. All agendas should contain the meeting title, date, time, location and a bullet list of topics to cover including intro, goal, discussion points and next steps.

    iii.   Outcomes
1. Assign owners to each action item/next step with mutually agreed upon dates to complete.
2. Set date/time for next meeting.
3. It is recommended that a note taker be designated to document and distribute main discussion points/takeaways during and after each meeting.

    iv.   Frequency

1. It is recommended that chapter leadership and/or committees meet on a regular basis. Previous experience has shown the most successful Chapters have leadership meetings on a monthly basis.
2. Be mindful of the investment of your colleagues' time and encourage punctuality and open communication about attending meetings.

I. Chapter Events

a. Quarterly Chapter Events
   i. Suggested Types of events:
      1. Speaker or Panel/Q&A
      2. Informal - get together at a bar / outdoor patio
      3. DAA Annual meeting
      4. Partnered events (see below for more detail)
   ii. It is suggested to outline events calendar in advance as the following requires substantial lead time:
      1. Speakers / Panelists
      2. Donated space
      3. Sponsors
   iii. Check for competing events. You can check the landscape of events through:
      1. DAA calendar
      2. MeetUp, Facebook, and other social event platforms
   iv. Have back-up speakers or panel ideas
   v. Chapter may choose to have more events than quarterly. However, DAA subsidy does not increase and remains at $250 per quarter.
b. Symposia
   i. Symposia are different from regular chapter events. They are educational conferences that are usually a minimum of four hours and are conducted by DAA HQ a maximum of once a year in a specific city. All symposia are coordinated with DAA HQ and the local membership relative to timing, sponsorships, and more.
   ii. DAA limits the number of Symposia it can schedule as it needs to consider other planned Symposia, industry events and staff resources.

J. Marketing & Communication

a. Getting Started
   i. The first step in promoting your event is to fill out the chapter event form. This form gives DAA staff all the necessary information to help promote your chapter and your event via email, the DAA website, the Community, and social media, including Meetup.com. Once you have completed this form, please allow up to two (2) business days before a confirmation of the event posting to be sent to all of your chapter's leaders.
b. Website

      i.   DAA HQ will post your event to the homepage calendar. Make sure you have completely filled out the event form including speaker bio, photo sponsor, and transportation/parking (if applicable).

  c. Email

      i.   DAA will send out two (2) emails to promote your event to all chapter members, as well as not-yet members in your geographic area. You specify the dates you prefer in the chapter event form and DAA HQ will notify you of the e-mail send dates available, doing our best to accommodate your email date preferences. Think of catchy subject lines, and key takeaways that will make it compelling to the audience.

  d. Chapter Leader's Contacts

      i.   The chapter leaders and planning team volunteers should also leverage their own networks and forward the DAA emails out to applicable lists.

  e. Social Media

      i.   DAA HQ will make posts to LinkedIn, Twitter, Facebook, and MeetUp about your event.

  f. Chapter Leader's Social Network

      i.   The chapter leaders and planning team volunteers should also leverage their own social networks and post the event there as well.

  g. Community and MeetUp

      i.   A chapter leader should post the event details (and link to the event website page) in the Chapter Community and as an announcement on MeetUp, once the event is posted on the DAA website. Experience has shown that having a local chapter leader post will improve responses (vs a staff member posting).

  h. Partnerships

      i.   Oftentimes, chapters will be approached by other local associations or groups to partner on an event. DAA encourages these synergistic partnerships.

      ii.   Best practices for an event partnership include:

         1. DAA listed as equal partner on all communications.

         2. Take registrations through DAA website.

         3. DAA and partner each have introduction to attendees about organization.

      iii.   Past partnership examples:

         1. MeasureBowling

         2. Insights Association Local Events

         3. Association of National Advertisers (ANA)

         4. Universities

K.   Ramifications

  a. Asking for help

      i.   We want all DAA Chapters to be successful. Don't be afraid to ask for help. Many chapter leaders have been in a situation where they wish they

had more guidance on organizing events, finding venues, finding speakers, attracting more members, and even handling conflicts.

    ii.   Connect with your DAA Board of Directors liaison. These roles are assigned following the annual board elections. The liaisons are your mentors to creating and maintaining a successful and thriving chapter.

b. Chapter Requirements

    i.   A Chapter may be deemed "not in good standing" if the following are not happening:

        1. Not hosting a minimum of two (2) events per year

        2. Not electing three (3) officials

c. If these minimum requirements are not met:

    i.   Board liaison and DAA HQ host a performance improvement plan meeting with leaders to align with Handbook requirements and make recommendations for success.

    ii.   If resolution is not made following the meeting, any chapter leaders may be removed from their position, or could result in a board vote to close a chapter.