

## Chapter Intervention Process

### **Purpose**

It is unfortunate that periodically one or more of the Association chapters becomes, or appears to become, non-functioning. The purpose of the intervention program is to identify the issues in the chapter that are causing it to be non-functioning. The desired result is to reactivate the chapter and prevent it from going dormant into dormant status. The earlier the need for intervention is identified, the better the Association is able to bring resources to bear to preserve a chapter. Identifying “endangered” chapters is, therefore, the first element of the intervention program.

### **“Endangered” Chapters**

A chapter may be identified as “endangered” by:

- **ARMA Headquarters’ Staff:** The Member Services Department makes periodic checks of its *Membership Comparison* report to identify chapters with undesirable numbers (e.g., retention rate, growth rate or total members below 20). It also checks the 990 financial information of each chapter to ensure that the chapter is in sound financial health.
- **Region Manager/Coordinator:** From their interaction with a chapter, the Region Manager/Coordinator may identify that a chapter is in need of assistance. Warning signs may include declining membership rates, no leadership succession, board burn out, or lack of attendance at meetings.
- **Chapter Leadership/Member(s):** Members of the chapter may recognize that they are in need of assistance and alert the Region Manager and/or the Member Services Department at ARMA International Headquarters.

Once a chapter has been identified as “endangered,” ARMA Headquarters Staff and Regional leadership works with the chapter to:

- **Do a Cost/Benefit analysis:** A conference call will be used between the chapter, region leadership, and ARMA headquarters staff to determine the issue(s) the chapter is facing and the level of commitment of the chapter membership to improve these issues. The objective is to determine the appropriate action to take with the chapter (e.g., intervention, merging with another chapter or dormancy).
  - If intervention is a feasible option, the Region Manager notifies the Member Services Department that the intervention process is to begin. Intervention is defined as providing options and resources available to chapters from ARMA Headquarters staff, leadership or other chapters.
  - If dormancy is the most feasible option, the process is initiated by the Region Manager. See Chapter Dormancy document.

### ***Intervention Process for Chapters***

Based off of the Cost/Benefit analysis an appropriate plan of action is developed by the region leadership and ARMA headquarters staff. This is communicated to the chapter for review and commitment to the plan.

The intervention process can take the form in many different ways. Here are a few ways but are not limited to:

1. *Mentoring*: This can be a refresher on a variety of topics by the ARMA headquarters staff or the region leadership on membership recruitment, educational programming, financial safe guards, etc.
2. *Region leadership contact to chapter members*: In some cases, such as board burn out, the region leadership needs to assist in getting volunteers to aid in the chapter. This is normally done with an email explaining the situation of the chapter and that the chapter members need to step up if they want the chapter to succeed.
3. *Merging with another Chapter*: In some cases there might be another chapter that is geographically close that merging the two would be in the best interest of the chapter members.
4. *Support Chapter*: The Region Manager contacts other chapters in the region or other suitable geographic area, and asks for assistance as a "Support Chapter." The objective is to identify a chapter that has a good fit with the endangered chapter. Assistance from a Support Chapter may take a variety of forms, including, but not limited to:
  - a) Sharing speakers or sponsor a speaker at the endangered chapter's meeting;
  - b) Holding quarterly chapter meetings that include members of the endangered chapter;
  - c) Offering use of the chapter's library;
  - d) Holding joint leadership training sessions;
  - e) Assisting with a Chapter Business Plan;
  - f) Sharing ideas regarding membership recruitment;
  - g) Offering financial assistance; or
  - h) Assisting with advocacy services (including raising awareness about record and information management or ARMA International) targeted at external institutions or agencies.

### ***Follow Up Process***

On a quarterly basis, the Region leadership checks on the progress being made under the intervention plan. Those quarterly findings should be shared with the Member Services Department at ARMA International Headquarters. At a time designated in the Plan, a formal evaluation of the intervention is made:

- If progress toward reactivating the chapter is apparent, activities continue under the terms of the Support Plan;
- If there is limited progress toward reactivating the chapter, the Support Plan is re-evaluated;
- If there is no progress toward reactivating the chapter, the endangered chapter may proceed to dormancy. See Chapter Dormancy document.