



SHRMTM

SOCIETY FOR HUMAN
RESOURCE MANAGEMENT

2008 Planning Workbook

SHRM® Chapter Achievement Plan



The Society for Human Resource Management (SHRM) is the world's largest association devoted to human resource management. Our mission is to serve the needs of HR professionals by providing the most current and comprehensive resources, and to advance the profession by promoting HR's essential, strategic role. Founded in 1948, SHRM represents more than 225,000 individual members in over 125 countries, and has a network of more than 575 affiliated chapters in the United States, as well as offices in China and India. Visit SHRM at www.shrm.org.

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Dear Chapter Leader:

Welcome to the 2008 Chapter Achievement Plan (CAP). You may have noticed a few changes on the cover. It does carry the new SHRM brand with its new "look and feel" that was announced during the 2007 SHRM Annual Conference & Exposition. Did you also notice a new heading: – 2008 Planning Workbook? The 2008 CAP is being separated into two distinct documents. This workbook is the first and is intended to be a planning document. Use it to plan your scope of work for the year. Have a copy available for each leader at your chapter's strategic planning meeting.

Throughout this document you'll find suggested activities and ideas to spark your thinking. Very few of the items listed are required. Some listed items are basics to help your chapter achieve sound operational performance.

Don't think of this as a checklist. Dare to be innovative, dare to be creative, and dare to think "outside the box" as you strategically plan your chapter's direction in meeting the SHRM mission and addressing the needs of your HR and business communities.

SHRM provides a wide variety of tools and resources to assist you in both the development and implementation of your plan. The manuals and toolkits mentioned— as well as hundreds of additional resources—may be found in the Volunteer Leaders' Resource Center (VLRC), which is online at www.shrm.org/vlrc. A tool that will be extremely helpful in developing your plan is the Strategic Planning Toolkit, which includes an administrator's guide, a participant's workbook (which may be duplicated), and a PowerPoint presentation. The toolkit may be used in conjunction with this workbook as you create your plan. Your plan may include elements listed in this workbook, and; it may include new elements not listed. You'll find "Bonus" lines in every section for the new elements!

Another change you'll notice:, Section 4 has been enhanced for 2008. In section 4, you'll find more depth on ATP and information on establishing your Enterprising Leadership priority. To reinforce our commitment to fulfilling the mission and encourage a strategic focus, we are increasing the value of this section. Check out page 18 for more details!

Once you've developed your plan for 2008, "measure" often. How well are you meeting or exceeding the plan? What milestones have you accomplished? Are you on target? Refer to this workbook frequently and monitor your progress.

The second distinct document of the 2008 CAP is the reporting tool. New for 2008, *all* reporting will be electronic. The online instrument will mirror the items that you see in this workbook. The easy-to-navigate reporting document will be the metric measure of *how* you did. The more important measure is, of course, the impact that you made! All 2008 CAPs must be submitted on or before Jan. 31, 2009.

2008 SHRM® Chapter Achievement Plan

WHAT'S IN IT FOR YOUR CHAPTER?

The CAP is one of the requirements in determining a chapter's eligibility to receive funding via the SHRM Chapter Financial Support Payment (CFSP) Program. Chapters not submitting a completed CAP in a timely manner are ineligible to receive CFSP assistance.

By submitting a CAP, your chapter is also eligible for recognition. See page 20 for more information on the award designations. As a Merit or Superior Merit Award winner, you will receive a special podium banner for use at your chapter events, a certificate, a letter of recognition from SHRM, and a recognition logo for your Web site. It is not necessary to have enough achievements for an award to turn in the CAP. Even if you don't have enough achievements to reach award status, your chapter may still be eligible to receive chapter financial support checks from SHRM just for submitting the CAP in a timely manner.

CONNECTION TO YOUR SHRM STATE COUNCIL

Each state council is comprised of all affiliated chapter presidents in a state (in addition to other volunteer leaders). Chapter presidents are automatic voting members of their respective state councils. It is very important that each chapter president participate in state council meetings and conference calls. If a president cannot attend a state council meeting, another member of the chapter board (preferably the president-elect) should attend. **To be eligible for a Superior Merit Award, your chapter must be represented at 50 percent of the state council meetings and/or calls.** Every chapter within the state must submit a CAP in order for your state council to be eligible for a Superior Honor State Council Award. Being active in your state council ensures that your chapter has a voice to the SHRM Board on issues important to your chapter and community.

ASSISTANCE IN COMPLETING THE CAP DOCUMENTS

Look to your state council for additional guidance on establishing your plan and aligning it with the council's strategic plan. Your regional team (SHRM staff) can answer questions and provide guidance on accessing the tools and resources available to you. Ask us!

– Your SHRM Regional Team

INSTRUCTIONS

Use the 2008 Planning Workbook as you would any planning tool. It is simply a guide.

As you review items that you would like to complete during 2008, place a check mark in the space provided to the left of the item to indicate that it is part of your plan. Use the Bonus areas to include your planned items not already listed in that section.

Once you've completed your review, total the number of check marks in each section to determine the total check marks and your eligibility for an award based on the proposed scope of work. This is just one measure of your success in achieving the plan.

Reporting on the outcome of your plan will be online, but, keep this planning tool handy anyways. It will serve as a quick and easy reference as you complete the online CAP.

TABLE OF CONTENTS

Section 1: Chapter Basic Requirements	3
Section 2: The Chapter, Its Members, and the Community	6
Section 3: Core Leadership Areas	10
Section 4: Living the Mission	18
Section 5: Instructions, Expectations, and Outcomes	19
SHRM Region Map	23

2008 SHRM® Chapter Achievement Plan

Section 1: Chapter Basic Requirements

SHRM depends on its affiliates to operate in a professional manner; provide resources for its volunteer leaders; effectively manage its finances; communicate with members, the community and SHRM; and promote SHRM. There are core activities that every chapter should complete to be successful and to operate smoothly. Completing the items in the "Basic Requirements" section will help your chapter build a stronger foundation for success.

The baseline for any award (along with meeting the minimum affiliation requirements) is the completion of all of the "REQUIRED" items *plus* 20 of the following 46 basic requirements. **Your chapter does not have to complete ALL 46 items.**

Operation of a Professional Chapter (REQUIRED)

- Complete and submit the "2009 Chapter Leader Information Form" (to communicate annual changes in chapter leadership) to SHRM headquarters **by Dec. 1, 2008**, or during the month your chapter transitions the board if your chapter is not on a calendar year. (This form can be found in the VLRC.) **(REQUIRED)**
- Hold a minimum of one chapter meeting per quarter during calendar year 2008. **(REQUIRED)**
- Per the SHRM chapter charter, provide an annual financial report to SHRM. This document should be a full balance sheet of the chapter's assets and liabilities as of Dec. 31, 2008. **(REQUIRED)**

Chapter Leadership

- Use VLRC resources.
- Develop or maintain position descriptions for chapter leaders.
- Conduct a minimum of four chapter board meetings, with at least one board meeting in person, during the year.
- Conduct an annual leadership transition and/or strategic planning meeting.
- Provide each board member with a copy of SHRM's Leaders' Guide.
- Chapter representative(s) will participate in the SHRM Volunteer Leaders Webcast Series or view archived webcasts.
- Implement or maintain a succession plan to identify potential and future leaders.
- Include a president-elect on the 2008 chapter board (strongly recommended).
- Recognize or reward chapter volunteer leaders.
- Adopt a Code of Ethics for the chapter. *small one in Bylaws*

During calendar year 2008, one or more chapter members will attend:

- 50 percent of the SHRM State Council meetings. (Please note: The chapter president or an appointed representative not already on the council in another role must attend 50 percent of state council meetings in person or via conference call for Superior Merit Award consideration.)
- Regional/state SHRM-affiliate leadership conference.
- SHRM Leadership Conference. (SHRM provides complimentary conference registration and overnight accommodations to your chapter's president OR president-elect [one per chapter]. Contact your regional team for more information.)
- Work in partnership with another SHRM chapter. (Examples include: Hold a joint program, assist another chapter in a project, work together for a common charity, etc.)

Section 1: Chapter Basic Requirements (continued)

Financial and Legal Management

- Use the SHRM Guide to Chapter Financial Management
- Prepare an annual budget for the chapter's fiscal year.
- Publish a financial statement for the membership.
- Conduct a fiscal year-end audit (by outside firm).
- File timely tax returns.
- Obtain/maintain tax identification number from the Internal Revenue Service where applicable. You will be asked to include where you are incorporated and your corporate identification number.
- Obtain/maintain tax-exempt status from the Internal Revenue Service where applicable and provide SHRM with a copy of the determination letter to keep in your chapter's permanent file.
- Provide a letter to SHRM indicating that exempt status is not available in the country or locality.
- Obtain/maintain incorporation status with state, territory, or country where applicable. You will be asked to include where you are incorporated and your corporate identification number.

Chapter Communications

- Publish a chapter newsletter in print and/or electronic formats.
- Publish an annual calendar of chapter meetings and events in print and/or electronic formats.
- Provide chapter members with access to board meeting minutes in print and/or electronic formats.
- Provide members with a chapter membership roster/directory in print and/or electronic formats.
- Submit meeting notices and/or press releases to local media.

Promotion of SHRM

- Properly and consistently display SHRM "AFFILIATE OF" logo on Web site, chapter letterhead, publications and/or products. You will be asked to submit samples of your use. **(REQUIRED)**
- Display SHRM promotional materials at meetings.
- Provide a SHRM benefits update at chapter meeting(s). (Helpful hint: A PowerPoint presentation with script is available.)
- Highlight SHRM activities or services in chapter newsletter and/or on chapter Web site.
- Display SHRM podium banner at chapter meetings/events.

Section 1: Chapter Basic Requirements (continued)

Web Presence

- Maintain a chapter Web site. (Web address: www.gmashrm.org
(Helpful Hint: SHRM can help you develop and maintain a site if you do not have one. Contact Shelly Quinn at squinn@shrm.org.)
- Link chapter Web site to SHRM Web site.
- Link chapter Web site to state council Web site.
- Link chapter Web site to HRCI Web site.
- Link chapter Web site to SHRM Foundation Web site.
- List chapter leaders and contact information on chapter Web site.
- List program dates and topics on chapter Web site.
- Provide ability for members to join or renew their chapter membership online.
- Provide ability for members to register for chapter meetings and/or events online.
- Link SHRM News Feed to chapter Web site (Helpful hint: A SHRM News Feed Fact Sheet is available.)

_____ **TOTAL PROPOSED ACHIEVEMENTS IN SECTION 1**

Section 2: The Chapter, Its Members and the Community

CHAPTER OPERATIONS

SHRM Membership

Use the total number of chapter members as of Dec. 31, 2007 150 (exact number; no rounding) as your starting point for 2008. **(You will be REQUIRED to report your total number of members as of Dec. 31, 2008, when you complete the online CAP.)**

During 2008, you will be asked to submit your chapter's membership directory/roster for auditing by SHRM. Annual submission of the roster is required by the chapter's charter. **(REQUIRED)**

51 percent or more of chapter members are SHRM members.

100 percent of chapter members are SHRM members.

All chapter board members are required through the chapter bylaws to also be SHRM members.

Research

Achieve a net increase in the number of SHRM members in the chapter during the calendar year.

Provide a local chapter dues discount (or assessed NO local dues) to SHRM members.

Provide contact information of chapter members who are not SHRM members (LMOs—Local Members Only) to SHRM, to allow SHRM to market SHRM membership to them.

Set goal for SHRM member retention improvement within the chapter. Our retention goal for 2008 will be 80%.
(To receive credit for this achievement when you complete the online CAP, you will need to include your 2008 goal.)

Meet or exceed SHRM member retention goal. Our actual SHRM member retention for 2008 was 90%.
(To receive credit for this achievement when you complete the online CAP, you will need to include your Dec. 31, 2008, retention percentage.)

Membership to write

Actively pursue initiatives to improve retention. Please describe initiative(s): _____

Contribution to SHRM Publications

Submit an article, white paper, competitive practice, resource, or tool to include in a SHRM publication (print or online). (Submission could be made by an individual chapter member.)

BONUS. List below any other chapter achievements in the area of chapter operations:

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____
- 6) _____

Section 2: The Chapter, Its Members and the Community (continued)

MEMBER SERVICES

Professional Development of Members

- Conduct at least one chapter workshop (defined as two or more hours of professional development).
- Hold at least one chapter conference (defined as a full day or more of professional development).
- Co-sponsor at least one workshop, seminar or conference with another SHRM chapter.
- Offer chapter programs in multiple cities/towns to serve members in outlying areas.
- Provide financial support for member(s) to attend the SHRM State Conference.
- Promote SHRM State or Regional Conference(s) to chapter members.
- Promote SHRM conferences to members.
- Use the SHRM Speakers' Bureau to secure speaker(s). You will be asked to provide the following information:

Name of speaker: Simon Bailey
Program topic: Release Your Brilliance
Date of presentation: May 2008

- Use the SHRM Chapter Speaker Program. You will be asked to provide the following information:

Name of speaker: _____
Program topic: _____
Date of presentation: _____

Programming

- Use the presentations/scripts available from SHRM for a chapter program.

~~Programs~~

- District Director will present "SHRM: Your Career Partner" to chapter members.
- Another member of state council (e.g., State Council Director, Core Leadership Area Director, etc.) will present to chapter members.
- Hold a special program for senior HR professionals
- Hold a CEO panel discussion as a monthly chapter meeting to give CEOs the opportunity to share their thoughts on the value HR brings to their organization from a business standpoint. Invite attendees to bring their CEO to the event to encourage "peer-to-peer" idea sharing and education.

Special Interest Groups (SIGs)

- Promote member development through Special Interest Groups (SIGs) such as compensation/benefits, training/HRD, global, etc., within chapter.
- Create a Staffing Management SIG.
- Maintain other SIGs (Our SIGs are Small HR, Compensation + Benefit)

Section 2: The Chapter, Its Members and the Community (continued)

Award Programs

- Sponsor an award promoting human resource excellence (e.g., HR Professional of the Year, HR Department of the Year, Workplace Excellence, Volunteer of the Year, Member of the Year, etc.).
- Submit a 2008 SHRM Pinnacle Award entry.
- Sponsor an HR-related student award.
- Sponsor an assistance program that benefits chapter members or their families such as a "Sons and Daughters" scholarship award program.

Chapter Member Involvement in SHRM Volunteer Leader Position(s)

Please list the names of any chapter members involved as a volunteer at the state council, state conference, regional, or SHRM level (Special Expertise Panel members, SHRM/HRCI/SHRM Foundation board members, etc.).

Member name and volunteer position (You may report as many as six):

- 1) Anthony Dix - Conference Exhibit Chair
- 2) Cindy Cerro - State Council Treasurer
- 3) Holly Bonnickson-Jones - State Council Secretary
- 4) Kari Heilman - Conference Registration
- 5) _____
- 6) _____

BONUS. List below any other chapter achievements in the area of Member Services:

- 1) 2008 Strategic Initiative to Engage Members
- 2) Co-sponsored World at Work Educational program for members
- 3) Awarded 2 HRM related scholarships for student members
- 4) Awarded 1 professional scholarship for members.
- 5) 2008 Strategic Initiative to Orient New Volunteers.
- 6) _____

Section 2: The Chapter, Its Members and the Community (continued)

LEADERSHIP IN THE COMMUNITY

- Appoint a primary media contact for the chapter.
- Establish/maintain a strategy for promoting the HR profession at the local level through press releases, media contacts, and other initiatives.
- Chapter will serve as a resource to the community or local media on HR issues in one or more instances.
- Chapter members will belong to other non-profit community groups as official representatives of the chapter.
- Provide educational opportunities about local community groups to chapter members such as elder care services, child care services, employee financial planning, disability assistance, etc.
- Conduct at least one chapter project to benefit the community, such as collecting books for a literacy program, providing school supplies to a school, holding a toy or food drive, organizing a business clothing drive, etc.
- Conduct at least one chapter program to benefit the community such as HR training for supervisors, employment law for small business owners, etc.
- Sponsor or host at least one program or event to benefit a charity or community organization, such as a golf tournament, where proceeds go to charity.
- Sponsor a special program for members related to business continuity planning/disaster preparedness and response.
- Provide a section of chapter Web site with key contacts and information related to community disaster agencies (e.g., Red Cross, Salvation Army, FEMA, DOL, etc.).
- Partner with a local or state agency to raise community awareness about disaster preparedness.
- Coordinate a disaster preparedness response or business continuity planning initiative.
- Extend invitations for local chapter events (professional development sessions, award programs, etc.) beyond the HR community to the C-Suite and local business community.

BONUS. List below any other chapter achievements in the area of Leadership in the Community:

- Anthony
- 1) Partner with Madison EEOC to provide Education.
 - 2) Coordinated Herb H Research Recognition.
 - 3) Job service presentations on Workforce Readiness.
 - 4) Expanded philanthropic support for DATS. Raised \$1500.
 - 5) _____
 - 6) _____

_____ **TOTAL PROPOSED ACHIEVEMENTS IN SECTION 2**

Section 3: Core Leadership Areas

The SHRM regional structure includes seven Core Leadership Areas (CLAs) to the state councils: College Relations, Diversity, Governmental Affairs, HRCI Certification, Membership, SHRM Foundation, and Workforce Readiness. Continued successful integration of these seven areas will be accomplished through the collaborative efforts of the SHRM staff and volunteers at the state council and chapter levels. These seven areas are critical to the success of achieving the mission of SHRM to serve the professional and advance the profession.

Chapters are vital to this effort and can support the success by working with state councils, defining goals and implementing effective support initiatives at your local level. As a chapter, it is important to align with the state council Core Leadership Area goals. Following are suggested efforts that chapters can implement. However, new creative ideas and suggestions are always encouraged and welcomed. The Bonus areas may be used to capture those efforts!

Please note: for Superior Merit Award consideration, the chapter must complete three achievements in each of the Core Leadership Areas.

College Relations Core Leadership Area

- Include a student chapter liaison or college relations chair on the 2008 chapter board.
- Adopt and implement SHRM 2008 college relations goals.
- Provide guidance on HR awareness to student chapters or educational institutions.
- Include students in professional chapter meetings and programs.
- Sponsor SHRM and/or chapter memberships for student chapter faculty advisor.
- Offer free membership or reduced dues for student members, or offer free or reduced chapter meeting attendance fees for student members. (If you did both, be sure to use the Bonus area below.)
- Provide speakers for student programs, arrange student company tours, participate in career day activities, etc.
- Provide student chapter assistance to participate in the region's SHRM Student Conference/HRGames.
- Provide a scholarship or recognition award to college student(s).
- Promote the availability of the SHRM Internship Guidebook (information available at www.shrm.org/students/careers/).
- Participate in student member mentoring program or coordinate/arrange for internships for students to gain HR knowledge. (If you did both, be sure to use the bonus area below.)
- Provide an educational institution with HR books, videos, and/or other materials, or a subscription to HR Magazine. (Chapters receive a 20 percent discount on gift subscriptions; form available at <https://sapphire.shrm.org/subscriptions/chapterform.asp>).
- Assist a college in chartering a new SHRM student chapter.
- Chapter representative(s) will participate in a student conference.
- Chapter representative(s) will participate in at least one SHRM college relations conference call.
- Chapter representative(s) will participate in at least one SHRM volunteer leader college relations webcast or will view an archived webcast.
- Use the College Relations Toolkit.

Kris Schmitt

KRIS S.

Kris S.

KRIS S.

KRIS S.

Section 3: Core Leadership Areas (continued)

BONUS. List below any other chapter achievements in the area of "College Relations Leadership:"

Kris S.

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____
- 6) _____

Diversity Core Leadership Area

- Include a chapter diversity advocate on the 2008 chapter board.
- Develop a Diversity Advisory Council for the chapter.
- Develop a chapter Diversity Plan.
- Diversify chapter board to reflect demographics of local community.
- Conduct, host, or sponsor a diversity seminar, conference, or diversity-focused event. (If you plan to do more than one, be sure to use the Bonus area below.)
- Chapter will partner with a diverse or minority organization on an event. You will be asked to provide the following information:
 - Name of organization: Madison EEOC Cultural
 - Type of event: Diversity Conference
 - Date of event: November 18, 2008
- Adopt and implement SHRM's 2008 Diversity Goals. Melissa
- Sponsor an award promoting diversity, such as a Workplace Diversity Award.
- Chapter representative(s) will attend the SHRM Diversity Conference.
- Chapter representative(s) will attend a state or local diversity conference of a SHRM affiliate.
- Chapter representative(s) will participate in at least one SHRM diversity conference call. Melissa
- Chapter representative(s) will participate in at least one SHRM volunteer leader diversity webcast or view an archived webcast. Melissa
- Use the SHRM Diversity Focus Area. Melissa
- Use the SHRM Diversity Toolkit. Melissa
- Use the SHRM Diversity Survey Template.
- Contribute to an article or write an article on the topic of diversity. Melissa
- Create a tool or resource that can be used by diversity practitioners.

Section 3: Core Leadership Areas (continued)

BONUS. List below any other chapter achievements in the area of Diversity Leadership:

Melissa

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____
- 6) _____

Governmental Affairs Core Leadership Area

Relationship Building

- Include a governmental affairs advocate on the 2008 chapter board.
- Adopt and implement SHRM's 2008 Governmental Affairs Goals. *Mike*
- Participate in a lobbying day, either at your state capital or in Washington, D.C.
- Create a "Day Inside the District" Program, where members within your chapter can meet with their state or federal public policy makers within the district. This includes inviting a state or federal public policy maker to speak at a chapter meeting.
- Create a "Day Inside the Beltway" Program, where members within your chapter can meet with their federally elected officials in Washington, D.C.
- Conduct at least one chapter program around a federal or state workplace policy issue that impacts the HR profession or a program on how members can impact the public policy process.

Information Sharing

- A minimum of three unique users per month from the chapter will participate in letter-writing through the SHRM HRVoice program.
- A chapter representative will attend the SHRM Legislative and Employment Law Conference.
- A chapter representative will attend a legislative conference of a SHRM affiliate.
- Present, at least quarterly, a legislative update at chapter meetings.
- Provide, at least quarterly, a legislative update in the chapter newsletter.
- Create an opportunity for SHRM HRVoice letter-writing at chapter event around a federal, state or local workplace issue. You will be asked to state what issue was addressed.
- Chapter representative(s) will participate in at least one SHRM governmental affairs conference call. *Mike*
- Participate in a SHRM volunteer leader legislative webcast or view an archived webcast. *Mike*
- Support SHRM federal and state public policy initiatives by keeping chapter members informed of alerts.

Section 3: Core Leadership Areas (continued)

Local or state legislator(s) will address the chapter.

Use the SHRM Governmental Affairs Toolkit.

BONUS. List below any other chapter achievements in the area of Governmental Affairs Leadership:

Mike

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____
- 6) _____

HRCI Certification Core Leadership Area

Include an HRCI certification advocate on the 2008 chapter board.

Adopt and implement 2008 HRCI Certification Goals. *Kris*

Promote the benefits and value of HRCI certification (PHR, SPHR, GPHR).

Educate members on the recertification process, including using the online recertification system.

Conduct an HRCI exam study group.

Co-sponsor a university-based certification preparation study course.

Achieve a net increase in the number of chapter board members certified. *Christopher*

Achieve a net increase in the number of chapter members certified. *Christopher*

Increase the number of chapter members who sat for the exam. *Christopher*

Sponsor a certification award to a chapter member or members.

Recognize certified chapter members at a chapter program, or otherwise recognize or reward certified members.

Obtain recertification pre-approval through HRCI for chapter-developed educational programs, workshops, or other events (form available at www.hrci.org).

Chapter representative(s) will participate in at least one SHRM/HRCI certification conference call.

Chapter representative(s) will participate in at least one volunteer leader SHRM/HRCI certification webcast or view an archived webcast.

Use the SHRM Certification Toolkit at www.hrci.org.

Section 3: Core Leadership Areas (continued)

Use the certification-related materials at www.hrci.org.

Take advantage of the special discount program available to chapters and purchase copies of the SHRM Learning System (both facilitator and participant versions) for use in a chapter study group.

BONUS. List below any other chapter achievements in the area of HRCI Certification Leadership:

- Kris/John*
- 1) *First year with pre-approval of educational calendar.*
 - 2) _____
 - 3) _____
 - 4) _____
 - 5) _____
 - 6) _____

Membership Core Leadership Area

Include a membership chair on the 2008 chapter board.

Chapter membership chair is a current SHRM member during the year.

Conduct a SHRM membership drive or a chapter membership drive. (If you plan to do both, be sure to use the Bonus area below.)

Use the "SHRM and Chapters in Partnership" brochure (contact your regional team to secure copies).

Hold a special chapter program on the value of SHRM membership.

Use SHRM at-large mailing lists to contact prospective chapter members (list is available from your regional team).

Hold at least one chapter event to recruit SHRM at-large members to chapter membership.

Include a link to the SHRM membership application on the chapter's Web site.

Adopt and implement SHRM's 2008 Membership Goals. *Chris B.*

Chapter representative(s) will participate in at least one SHRM membership conference call. *Chris B.*

Chapter representative(s) will participate in at least one SHRM volunteer leader membership webcast or view an archived webcast. *Chris B.*

Conduct new member orientation(s).

Hold at least one networking event during a monthly meeting or as a separate event.

Offer free or reduced dues to members in transition (seeking employment).

2008 SHRM® Chapter Achievement Plan

Section 3: Core Leadership Areas (continued)

- Conduct member needs assessment.
- Publicize SHRM's special membership promotion programs (e.g., the \$145 first-time SHRM membership fee for chapter members, SHRM online membership promotions).
- Use the SHRM Membership Recruitment and Retention Toolkit. *Chris B. + Kris S*

BONUS. List below any other chapter achievements in the area of Membership Leadership:

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____
- 6) _____

SHRM Foundation Core Leadership Area

- Include a SHRM Foundation advocate on the 2008 chapter board.
- Make a chapter contribution to the SHRM Foundation. You will be asked to indicate the 2008 contribution amount: \$ 500.00.

_____ Hold at least one special event (e.g., 50/50 raffle, silent auction, etc.) to benefit the SHRM Foundation. You will be asked to describe your event: _____.

_____ Conduct a Chapter Leadership Campaign to encourage all chapter officers to make individual donations to the SHRM Foundation.

Note: If you check and complete all four items above, your chapter is qualified to be a Chapter Champion. To participate in the Chapter Champion Program, complete the appropriate online form.

- _____ Align chapter goals to support the 2008 SHRM Foundation Goals. *Anthony*
- _____ Increase the chapter's contribution over the previous years' contributions. *Anthony*
- _____ Increase the number of SHRM Foundation individual donors in the chapter (donor report available from your state council or from your regional team). *Anthony*
- _____ Chapter representative(s) will participate in at least one SHRM Foundation Core Leadership Area conference call. *Anthony*
- _____ Highlight availability of SHRM Foundation *Effective Practice Guidelines* series to members.
- Promote the SHRM Foundation at chapter meetings, in chapter newsletters, and/or on chapter Web site.
- _____ Present the SHRM Foundation presentation at a chapter meeting (available in the SHRM Foundation Toolkit).

Section 3: Core Leadership Areas (continued)

- Educate members about the mission and work of the SHRM Foundation.
- Display Foundation literature (e.g., campaign brochure, fliers, etc.) at every chapter meeting.
- Use one or more of the SHRM Foundation's DVDs in a chapter program.
- Promote the 2008 SHRM Foundation Regional Scholarship Program.
- Chapter representative(s) will participate in at least one SHRM Foundation webcast or view an archived webcast.
- Use the SHRM Foundation Toolkit.

BONUS. List below any other chapter achievements in the area of SHRM Foundation Leadership:

Anthony

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____
- 6) _____

Workforce Readiness Core Leadership Area

- Include a workforce readiness advocate on the 2008 chapter board.
- Adopt and implement SHRM's 2008 Workforce Readiness Goals. *Melissa*
- Visit with a key local or state public policy official (e.g., state department of labor, state department of education, local one-stop center) to discuss workforce readiness issues and programs in the state or community.
- Partner with a national/state/community workforce readiness organization, such as Junior Achievement, America's Promise, etc.
- Promote or participate in national or statewide workforce readiness initiative such as Job Shadow Day, workforce readiness certification (i.e., WorkKeys), or Jobs for America's Graduates. You will be asked to provide the name of program: *Take Your Child to Work by Melissa*
- Sponsor or participate in community workforce readiness activities (e.g., job shadowing, mock interviews, speakers for schools, career counseling, etc.).
- Hold at least one chapter program to promote awareness and knowledge of the value and importance of workforce readiness programs.
- Chapter member(s) will serve on a state or local workforce development committee or board.
- Chapter representative(s) will participate in at least one SHRM volunteer leader workforce readiness webcast or view an archived webcast. *Melissa*
- Chapter representative(s) will participate in at least one SHRM workforce readiness conference call. *Melissa*

Section 3: Core Leadership Areas (continued)

- Use the SHRM Workforce Readiness Manual. *Melissa*
- Partner with the regional Workforce Investment Board or similar agency to place new or re-entering workers into the workforce. *Melissa*
- Chapter representative(s) will attend a state or regional workforce readiness event sponsored by a SHRM affiliate.
- Chapter representative(s) will participate in a state council Workforce Readiness Advisory Council.
- Chapter representative(s) will participate in state council workforce readiness conference calls. *Melissa*
- Coordinate a resume service or job bank for local members and employers.
- Sponsor a special program for chapter members in transition (e.g. job search support groups, resume/interviewing workshops, etc.).

BONUS. List below any other chapter achievements in the area of Workforce Readiness Leadership:

Melissa

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____
- 6) _____

_____ **TOTAL PROPOSED ACHIEVEMENTS IN SECTION 3**

Section 4: Living the Mission

Serve the Professional. Advance the Profession.

SHRM's mission is to Serve the Professional (STP) and Advance the Profession (ATP). STP is about delivering credible information, products and activities to help professionals perform their day-to-day responsibilities effectively. ATP is about helping HR professionals understand their leadership capabilities and potential contributions to their organizations and providing them with the tools to enable them to fully engage in the *business* process—and helping them advance their careers. ATP is also about helping the business community (and the public, broadly) understand the contributions HR can make to organizational success. Some excellent examples of STP and ATP may already be listed in this workbook.

Key to being an effective chapter is the ability to launch and execute key strategic initiatives in both the STP and ATP realms. While the ability to execute against the operational requirements of your chapter is critical, equally important is your ability to identify areas of strategic impact.

Serving the Professional

Please use the space provided on page 21 to outline *any* STP strategic initiative (other than items already covered in this document) to be undertaken by your chapter in 2008. Ample space is provided to include the purpose, the goal, and desired outcome. That outline will be the foundation upon which you will build your entire initiative. STP initiatives are those that would fall under the following SHRM strategic objectives:

- Providing comprehensive information and tools to HR professionals to enable them to make informed decisions.
- Helping HR professionals develop their knowledge, skills and careers.
- Being the recognized community for exchanging ideas, developing professional relationships, and increasing HR knowledge.

When you report on this chapter strategic initiative for STP on the 2008 CAP, your response will be limited to 200 words.

Advancing the Profession

Please use the space provided on page 22 to outline *any* ATP strategic initiative to be undertaken by your chapter in 2008. (This includes ATP items within sections 2 and 3 of this document.) This initiative will become your Enterprising Leadership priority for 2008. Ample space is provided to include the purpose, the goal, and desired outcome. That outline will be the foundation upon which you will build your entire initiative. ATP initiatives are those that would fall under the following SHRM strategic objectives:

- Setting the agenda for the HR profession.
- Ensuring HR is recognized for its contribution to business success.

Examples may include initiatives in high-impact areas such as diversity, workforce readiness, health care, the 2008 election, or corporate sustainability.

While new initiatives are highly encouraged, Enterprising Leadership could be achieved through an existing initiative that will be enhanced, have expanded horizons, have a "higher bar" of achievement measures, and/or have a broadened scope.

When you report on this chapter strategic initiative for ATP on the 2008 CAP, your response will be limited to 200 words. However, when you submit your initiative for the Enterprising Leadership publication in October (2008), you will have expanded response capabilities. To emphasize the importance of ATP, your initiative will be worth five base achievement points and up to an additional 15 BONUS points when you report on it in the 2008 CAP in January 2009.

_____ **TOTAL PROPOSED ACHIEVEMENTS IN SECTION 4**

Section 5: Instructions, Expectations and Outcomes

You've completed your plan! Use the space below to total the achievements you will complete if you "work your plan" as written.

TOTAL PROPOSED ACHIEVEMENTS FOR 2008

Indicate the total number of proposed achievements for each section in the workbook.

_____ Section 1: Chapter Basic Requirements

_____ Section 2: The Chapter, Its Members, and the Community

_____ Section 3: Core Leadership Areas

_____ Section 4: Living the Mission

_____ TOTAL Proposed Achievements

CAP SUBMISSION

New for 2008! All CAP submissions will be online. Only those CAPs submitted online will be accepted. The 2008 CAP will be available online during the third quarter in the Volunteer Leaders' Resource Center. Watch for the announcement in *LeadersEdge*.

Required documentation *only* should be submitted via e-mail to your regional administrator, faxed to (703) 739-0399, or sent by USPS to SHRM Member Relations Department, 1800 Duke Street, Alexandria, VA 22314-3499.

REQUIRED ITEMS

To ensure that your CAP submission next January is complete, the following documents must be submitted to SHRM:

- Samples of the proper use of the SHRM "Affiliate of" logo.
- Chapter's annual financial report (full balance sheet reflecting the chapter's assets and liabilities).
- Chapter's membership roster (at the time it is requested by SHRM).
- Chapter Leader Information Form (CLIF) submitted by Dec. 1, 2008.

In addition:

- The chapter must have held at least one meeting per quarter during 2008.
- The total number of chapter members must be reported in line one of section 2, Chapter Operations.

Section 5: Instructions, Expectations and Outcomes (continued)

AWARD ELIGIBILITY AND SCORING

SHRM recognizes significant chapter achievement by awarding designations at three different levels. To be eligible for any award, the completed 2008 CAP must be submitted on or before Jan. 31, 2009. The definition and baseline requirements may be found below.

SUPERIOR MERIT AWARD

To be eligible for a Superior Merit Award, your chapter must:

- Complete all required items *plus* at least 20 of the chapter basic requirements.
- Meet the minimum affiliation requirements.
- Have been represented at a minimum of 50 percent of the state council meetings by the chapter president or designee (not a chapter member in a state council role).
- Complete at least three achievements in *each* of the seven Core Leadership Areas.

In addition to completing the items listed above, your chapter must complete the number of items listed below based on your chapter size (verified in section 2).

_____ 80 items - Small Chapters (10-100 members)

_____ 85 items - Medium Chapters (101-300 members)

_____ 90 items - Large Chapters (301-500 members)

_____ 95 items - Mega Chapters (501-1000 members)

_____ 100 items - Super Mega Chapters (1,001+ members)

MERIT AWARD

To be eligible for a Merit Award, your chapter must:

- Complete all required items *plus* at least 20 of the chapter basic requirements.
- Meet the minimum affiliation requirements.

In addition to completing the items listed above, your chapter must complete the number of items listed below based on your chapter size (verified in section 2).

_____ 70 items - Small Chapters (10-100 members)

_____ 75 items - Medium Chapters (101-300 members)

_____ 80 items - Large Chapters (301-500 members)

_____ 85 items - Mega Chapters (501-1000 members)

_____ 90 items - Super Mega Chapters (1,001+ members)

HONORABLE MENTION

"Honorable Mention" recognition will be awarded to any chapter which completes all required items plus at least 20 items in the "Basic Requirements" section *and* meets the minimum affiliation requirements, but does not qualify for a Merit or Superior Merit Award.



2008 SHRM® Chapter Achievement Plan

STP Initiative for 2008

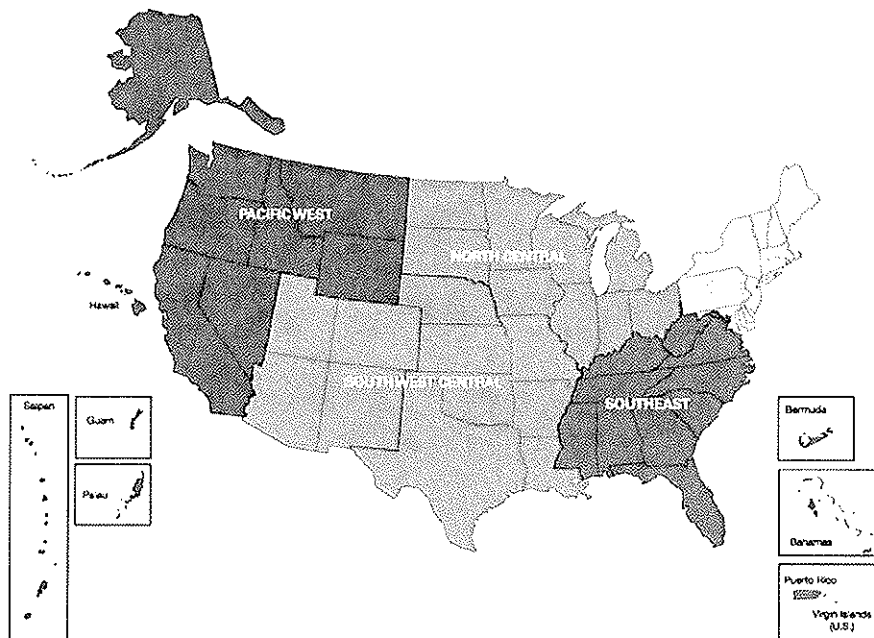


2008 SHRM® Chapter Achievement Plan



ATP Initiative for 2008

SHRM Region Map



Northeast Region

Connecticut, Delaware, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont

Southeast Region

Alabama, Bahamas, Bermuda, District of Columbia, Florida, Georgia, Kentucky, Mississippi, North Carolina, Puerto Rico, South Carolina, Tennessee, Virgin Islands, Virginia, West Virginia

North Central Region

Illinois, Indiana, Iowa, Michigan, Minnesota, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin

Southwest Central Region

Arizona, Arkansas, Colorado, Kansas, Louisiana, Missouri, New Mexico, Oklahoma, Texas, Utah

Pacific West Region

Alaska, California, Guam, Hawaii, Idaho, Montana, Nevada, Northern Mariana Islands, Oregon, Palau, Washington, Wyoming

A complete listing of regional team members and member relations contacts is located online in the Volunteer Leaders' Resource Center at www.shrm.org/vlrc.



Society for Human Resource Management
1800 Duke Street, Alexandria, VA 22314-3499 USA
+1-703-548-3440 • Fax: +1-703-739-0399
TTY/TDD: +1-703-548-6999
E-mail: shrm@shrm.org • Web site: www.shrm.org