

State Leadership Conference

SHRM Volunteer Training

Shelly Trent, SHRM-SCP, CAE

Field Services Director, SHRM

Bhavna Dave, PHR

Director of Talent

SHRM member since 2005



SHRM and its affiliates . . .



The “parent” organization, not the “national chapter”

- Founded in 1948
- World’s largest professional association dedicated to HR
- Headquartered in Alexandria, VA
- About 400 staff members
- Over 280,000 professional and student members in more than 140 countries
- More than 575 affiliated local chapters
- Over 6,000 volunteer leaders



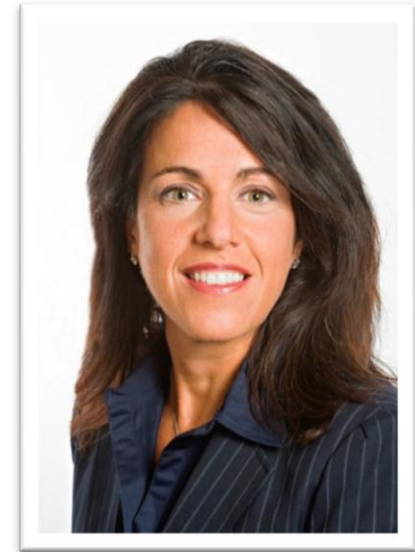
SHRM Staff Leadership



Henry (Hank) Jackson,
CPA
President/CEO



Robert Carr, JD, SHRM-
SCP
SVP of Membership,
Marketing and External
Affairs

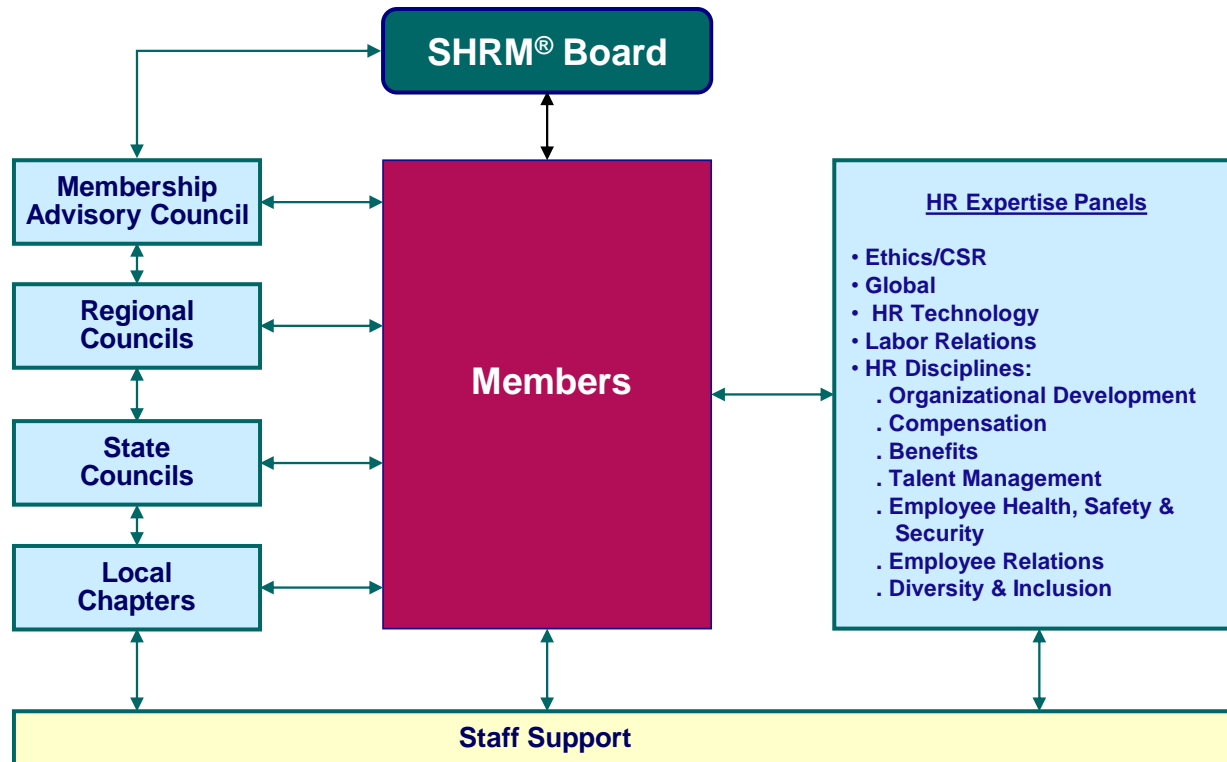


Elissa O'Brien, SHRM-
SCP
VP of Membership

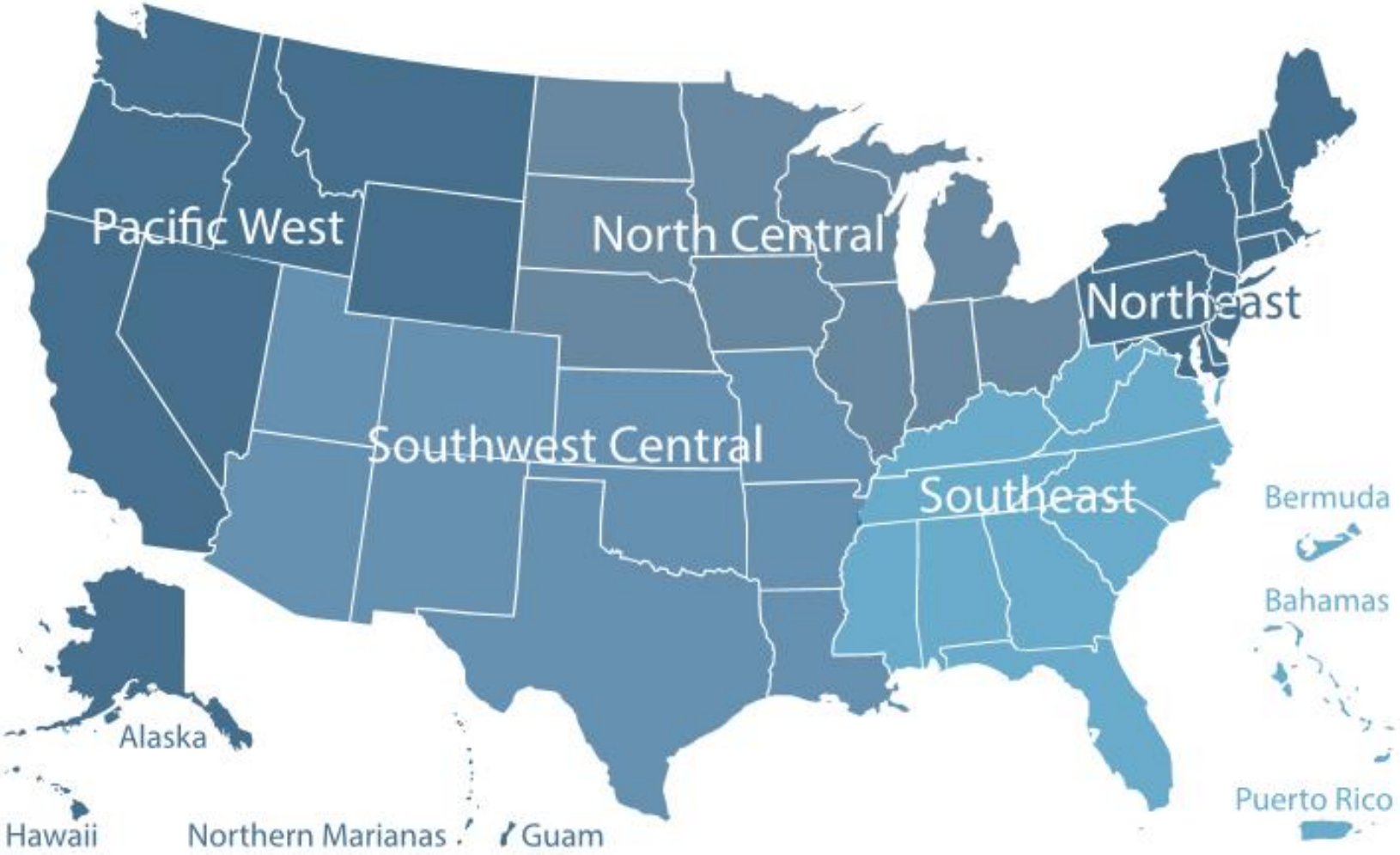


Brian D. Silva, SHRM-SCP, GPHR
Chief Human Resources Officer and
Senior Vice President, Administration
Fresenius Medical Care NA
Waltham, Mass.

Volunteer Leadership Structure



SHRM Regions



Northeast Region

Susan Loynd, SHRM-SCP

Southeast Region

Susan Craft, SHRM-SCP, GPHR

North Central Region

Steve Browne, SHRM-SCP

Southwest Central Region

Jeff Owens, SHRM-CP

Pacific West Region

Mike Letizia, SHRM-CP, PHR-CA

SHRM Regional Councils (State Council Directors)

- Each of the regions has a council composed of the state council directors in each of the five regions.
- Regional Councils provide opportunities for best practice sharing among and between the council members.
- In addition, regional councils:
 - Provide channels of communication on human resource management issues.
 - Encourage connections with business leaders and the general business community to advance the profession.
 - Play a key role in identifying and communicating emerging strategic issues.
 - Provide input to the SHRM Board of Directors.
 - Facilitate the achievement of SHRM's seven strategic objectives by providing state councils and chapters with guidance and assistance.

Usually meet quarterly

- State councils provide HR professionals with programs, published materials, conferences, and more. They also serve as "entry points" for HR professionals new to a particular state or for those in an area not covered by a local chapter.
- Rather than communicate directly with over 575 chapters, SHRM has state councils in place as way chapter leaders can come together to share ideas, successes, and challenges.
- Each state council has a board of volunteers that includes **representation from each chapter.**

There are ongoing webinars/calls for District Directors

- Assist chapter presidents with questions
- Visit chapters to provide presentation on SHRM member benefits to your members (great for a membership drive!)
- Ensure that chapter presidents attend state council meetings
- Ensure that chapters submit SHAPE on time
- Your District Director and State Council Director should be your first point of contact for assistance
- For CLA issues/questions, the state CLA leaders should be your points of contact

There are ongoing webinars/calls for these groups

- Each **state council** is asked to have the following positions:
 - College Relations
 - Diversity
 - Governmental Affairs
 - SHRM Certification
 - Membership
 - SHRM Foundation
 - Workforce Readiness
- **Chapters** should consider these board roles as well
- Chapter volunteers in CLA roles should have **ongoing communication** with the state council CLA roles and with each other.

There are ongoing webinars/calls for these groups

Small Chapter = up to 100 members

Medium Chapter = 101 – 300 members

Large Chapter = 301 – 500 members

Mega Chapter = 501 – 1,000 members

Super Mega Chapter = 1,000 + members

A black and white portrait of a woman with long dark hair, smiling. She is wearing a dark collared shirt and a necklace. The background is black.

Important Dates and Deadlines

Devon Conley
Human Resources Manager
SHRM member since 2005

Important Dates & Deadlines

18

Mark Your Calendars! (late submissions = no SHAPE award)

November 19-21, 2015

SHRM Volunteer Leader Summit; Washington DC

December 1

(if you transition mid-year, send it in 15 days before the term starts)

CLIF & SCLIF due

December 31

Deadline for receipt of SHRM Foundation donation for 2014

January 31

Chapter SHAPE Year-End Report due

January 31

State Council SHAPE Year-End Report due

- November 19-21, 2015
- Target audience is the incoming chapter presidents and incoming state directors
- EVERY chapter should be represented EVERY year
- FREE for incoming chapter presidents; includes hotel, designated meals and conference registration; chapter pays travel expenses
- If the incoming president cannot attend, the president-elect for the next year may attend in his/her place
- Attendance is tied to SHAPE award levels
- For those of you who may have missed it, there are short recorded webinars for you to review AND the workbooks are online in the VLRC for download for your board at
www.shrm.org/Communities/VolunteerResources/Pages/LeadershipConference.aspx
- The 2015 SHAPE workbooks are available online

Slides and webinars available from the Summit at

www.shrm.org/communities/volunteerresources/pages/leadershipconference.aspx

Chapter President/President-Elect

Chapter President/President-Elect – [Recorded Webinar](#) or [PowerPoint Slide Deck](#)

[Breakout by Chapter Size Presentation](#)

[SHRM Strategic Planning Guide](#)

[SHRM Volunteer Leader Reference Guide](#)

[SHRM Foundation Overview](#)

State Council Director/Director-Elect/District Director

State Council Director/Director-Elect - [Recorded Webinar](#) or [PowerPoint Slide Deck](#)

State Council District Director - [Recorded Webinar](#) or [PowerPoint Slide Deck](#)

[SHRM Strategic Planning Guide](#)

[SHRM Volunteer Leader Reference Guide](#) assists in chapter planning, resources and a SHRM Glossary

[SHRM Foundation Overview](#)

State Council Breakout Presentation (to come)

State Council Membership Director

State Council Membership Director - [Recorded Webinar](#) or [PowerPoint Slide Deck](#)

State Council Membership Breakout Presentation(s)

2014 Volunteer Leaders' Summit – [Membership Summit 11 20 2014 Morning Presentation](#)

2014 Volunteer Leaders' Summit – [Membership Summit 11 20 2014 Afternoon Presentation](#)

2014 Volunteer Leaders' Summit – [Membership Summit 11 21 2014](#)

2014 Volunteer Leaders' Summit -- [Certification Deck FINAL](#)

[HR Young Professionals \(YP's\) Toolkit for SHRM Affiliated Chapters](#)

State Council Certification Director

State Council Certification Breakout Presentation

[SHRM Certification Flyer](#)

[HR Competencies Brochure](#)

www.SHRMcertification.org



Governance

Kathryn Medina, SPHR
Executive Director
SHRM member since 2005



- **Non-profit association**

- Governed by federal and state laws for non-profits
- *Entire board should read and know what the bylaws say*
- Bylaws must accurately reflect what the board is doing
- No one person on the board makes decisions for chapters; must be by majority vote of the governing body

- **An affiliate of SHRM – the parent organization**

- Rules and expectations
- Chapter bylaws cannot conflict with SHRM bylaws
- Must keep bylaws up to date
- Chapter charter outlines the relationship between SHRM and chapter



- All board members should carefully review the bylaws upon taking office and should follow them as a **legally binding document**
- Bylaws model online – be sure your bylaws include all required sections as stated in the checklist online
- ANY bylaws revisions need to be sent to your Field Services Director (FSD) for review
- Two sets: original bylaws showing markups/changes and clean, final set for signature
- ANY bylaws changes will then be approved by SHRM (including name changes and changes to 100%)
- **Do not plan your chapter membership vote until AFTER you have received the signed final copy from SHRM**

Must be used correctly in
all places at all times

Graphics Standards Manual for Affiliates

New Sections added

- Chapter and State Council Award Logos
- Membership Star and Superstar Award Logos
- 100 Percent Chapter and State Council Logos
- Chapter and State Council Logos
- **MUST GET Chapter and Council logos approved by SHRM if your name contains SHRM (review Section 3 of Graphics Guide)**



Which is correct?



Check your name badges, websites, brochures, etc.



- Place prominently on all materials produced by an affiliate of SHRM.
- Do not modify the logo; must be the entire “Affiliate of” logo, and never be smaller than 1-inch wide.
- Use in conjunction with your chapter logo — same size and near each other
- Place it “above the fold” on website
- If SHRM is part of your chapter or council name, your logos must be approved by SHRM (review Section 3 of Graphics Guide)

- SHRM bylaws require chapter presidents and all state council members be *active SHRM members throughout the duration of their term.*
 - Must be indicated in chapter bylaws.
 - SHRM encourages chapters to require all board members to be SHRM members for greater synergy in the affiliation relationship.
- Effectively lead chapter or state council throughout the year and mentor president-elect for upcoming year.
- Assure bylaws are being followed.
- *Attend and actively participate in state council meetings.*

New chapter affiliation requirements as of January 1, 2012:

- **All 100%-Chapters**
 - Minimum of 25 SHRM members AND
 - 100% SHRM membership – no categories for non-SHRM members
- **All Non-100% Chapters**
 - Minimum of 25 SHRM members AND
 - Minimum of 51% SHRM membership
- Applies to all existing and new chapters - no grandfathering.
- Chapters not currently meeting new affiliation requirements will have had a five-year period (by 12/31/2016) to do so.
- SHRM is working with under-affiliated chapters to ensure successful transition to new requirements (Fortune Forty Team).

- Chapter Presidents should attend all state council meetings or send substitute/proxy
- Please READ all correspondence from your State Council, District Directors, and from your Regional Team
- Please ask your company to allow e-mail messages from SHRM, your Regional Team and council members
- If you ever opted out of any SHRM e-mails, you will not receive volunteer e-mails until you opt in again
- E-mails from SHRM Volunteer Communications are our MAIN point of communication with you – please read them

- Use the online position descriptions as a guide for volunteer leader positions in your chapter
- Easier to hold volunteers accountable if you have a written description of role & responsibilities
- Sample descriptions available online in VLRC
- List amount of time each role will require
- Consider giving each volunteer the position description and after they review it, they can sign off stating that they understand the requirements



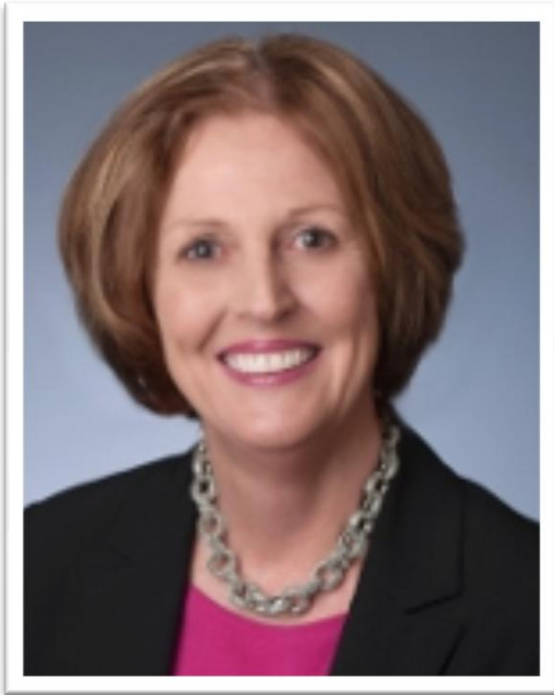
Communication



Bruce Elliot
Manager, Compensation & Benefits
SHRM member since 2011

- There are four administrators at headquarters with a general number to call: **(800) 283-SHRM, x 3333**; 7 a.m.-7 p.m. ET. Anyone at that number can assist you with CFSP, rosters, designation forms, etc.
- The number will take voicemails 24/7 but will only be manned from 7 a.m.-7 p.m. ET.
- E-mail: SHRM.MemberRelations@shrm.org.
This is a generic e-mail inbox that will be accessible by all the Member Engagement Associates.
- Order SHRM supplies from your Member Engagement Associate.
- The FSDs don't keep records, files, or supplies at their home offices.

Your SHRM Staff Contacts



Dorothy Knapp, SHRM-SCP

dorothy.knapp@shrm.org

(800) 283-7476, x 6119








Kristine Hofmann

kristine.hofmann@shrm.org

(800) 283-7476, x 6082

Watch your inbox for these!

These messages contain important dates, links, information, and deadlines.

	SHRM	SHRM Chapter Presidents E-Bundle
	SHRM	SHRM State Council Directors E-Bundle
	SHRM Volunteer Relations	SHRM State Council Director E-Bundle
	SHRM Volunteer Relations	SHRM Chapter President E-Bundle
	SHRM Volunteer Relations	SHRM Update for September



Volunteer Communication

You are receiving this e-mail bundle due to your role as a SHRM Chapter President. SHRM packages these messages together in order to reduce the number of e-mails that we send you.



The VLRC: Volunteer Leader Resource Center www.shrm.org/vlrc

Devon Conley
Human Resources Manager
SHRM member since 2005

This Week's 5 HR Must-Haves. [Click Here](#)

Search

- HR TOPICS & STRATEGY
- LEGAL ISSUES & PUBLIC POLICY
- TEMPLATES & SAMPLES
- HR STANDARDS & COMPETENCIES
- RESEARCH & METRICS
- EDUCATION & CERTIFICATION
- CONFERENCES
- PUBLICATIONS
- COMMUNITIES**

HR ANSWERS

COMMUNITIES

- Overview
- Member Directory
- Member News
- SHRM Connect
- HR Talk
- SHRM Chapters
- HR Young Professionals
- Student Member Center

VOLUNTEERS

- Overview
- Membership Councils
- Special Expertise Panels
- Volunteer Leader Resource Center**
- Volunteer Opportunities

[SHRM](#) » [Communities](#) » [Volunteer Resources](#)

Volunteer Leaders' Resources

SHRM Certification

- [Chapter Study Group Information](#)
- [Preferred Provider Resources](#)

- [Certification CLA Webinar \(Oct. 16, 2014\)](#)
- [SHRM Body of Competency & Knowledge Infographic \(Sept. 2014\)](#)
- [SHRM Certification Update Webinar \(Sept. 9, 2014\)](#)
- [Recertification Handbook \(Sept 9, 2014\)](#)
- [The SHRM Certification-A Webinar \(Aug. 21, 2014\)](#)
- [SHRM Certification Presentation and Toolkit \(Aug. 5, 2014\)](#)
- [CEO Update \(June 3, 2014\)](#)
- [SHRM Certification FAQ](#)

 [2014 Volunteer Leader Event Master](#)

Schedule

For volunteer news and articles, read the *SHRM Update*.

VOLUNTEER RESOURCES

- [Affiliate Successful Practice Center](#)
- [Awards and Scholarships](#)
- [Chapter Locator](#)
- [Core Leadership Areas](#)
- [General Information about SHRM Volunteer Leaders](#)
- [Graphics Manual](#)
- [SHRM Leadership Conferences](#)
- [Locate SHRMs Regional Team For Your Area](#)
- [Resources for Affiliating as a New Chapter](#)
- [Resources for Chapter Management Professionals](#)
- [Resources for Chapter...](#)



Earn a
**Master's
from Cornell
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...without
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your career

Employee Relations
Collective Bargaining
Human Resources
Labor Economics
Organizational Behavior

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- [Resources for Chapters](#)
- [Resources for SMA Special Interest Chapters and Groups](#)
- [Resources for State Councils](#)
- [Resources for Student Chapters](#)
- [Speaker Resources](#)
- [Using the Volunteer Leaders' Resource Center](#)
- [Volunteer Opportunities](#)
- [Webcasts for Volunteer Leaders](#)

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[SHRM Update](#)

[SHAPE](#)

Welcome to the Volunteer Leaders' Resource Center! This site is designed to assist you in your role as a SHRM volunteer leader.

Volunteer Leader Events - Week of 10/27

No events are scheduled for this week.

Dates and Deadlines

SHAPE Year-End Reporting forms now available in the [SHAPE Center](#)

If your officer terms follow the calendar year (i.e., start January 1), the [Chapter Leader Information Form \(CLIF\)](#) is due December 14

SHRM'S HR
Vendor Directory

[Volunteer Opportunities](#)

[Webcasts for Volunteer Leaders](#)

**SHRM'S HR
Vendor Directory**

HR Products
and Services

*Find it
now*

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If you have any changes in your volunteer leaders during the year, report them to your [Regional Administrator](#)

What's New on the VLRC?

[2014 SHRM Pinnacle Finalists Announced](#)

[What's New at SHRM 4Q Rolling PowerPoint](#)

[SHRM President & CEO Hank Jackson's quarterly Volunteer Leader letter](#)

[Findings of the 2014 Chapter Operations Survey - Report is available for download](#)

[100% Chapter Transition Toolkit](#)

SHRM Branding Center

[SHRM AFFILIATE OF Logo](#)

[Graphics Standards Manual for Affiliates](#)

[Presentation Template for Affiliate Use \(PowerPoint\)](#)

[SHRM Affiliate Logo Approval Form](#)

Fortune Forty Initiative

The Fortune Forty Initiative is a focused membership growth strategy pilot for a selected group of SHRM chapters. [Learn more](#) about the targeted efforts of the Fortune Forty chapters.

The information contained within this site gives you an overview of the Society, its organization, mission, and services. Because SHRM could not be successful without the hard work and support of volunteer leaders, we hope your experience as a leader will be rewarding. We look forward to working with you to support, promote, and develop the human resource profession. Your work as a volunteer leader will help SHRM realize our goals as a professional society devoted to the interests of those who manage the human assets of the world's businesses, agencies, and organizations.

If, after reviewing the materials and information contained within this site, you have additional questions regarding your role as a chapter leader, contact a member of your [Regional Team](#).

We suggest that you bookmark this page and visit it often!

Need to update your address, phone number, or email address with SHRM? Please [click here](#).

Fortune Forty
is a group of
chapters under
25 SHRM
members and
under 51%
affiliation

VOLUNTEER RESOURCES

[Affiliate Successful Practice Centers](#)

[Awards and Scholarships](#)

[Chapter Locator](#)

[Core Leadership Areas](#)

[General Information about SHRM Volunteer Leaders](#)

[Graphics Manual](#)

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[Locate SHRMs Regional Team For Your Area](#)

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[Webcasts for Volunteer Leaders](#)

[SHRM](#) » [Communities](#) » [Volunteer Resources](#)

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[SHRM Body of Competency &](#)

[Knowledge Infographic \(Sept. 2014\)](#)

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[Schedule](#)

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[SHRM Update](#)

[SHAPE](#)

- RESOURCES FOR CHAPTERS
- Affiliate Successful Practice Center
- Awards and Scholarships
- Chapter Locator
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- Resources for Affiliating as a New Chapter
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- Volunteer Opportunities
- Webcasts for Volunteer Leaders

SHRM » Communities » Volunteer Resources » Resources for Chapters

Resources for Chapters

Chapter Operations Survey - 2014 **NEW**

Survey data from chapters about dues, programs, etc.

- Administration/President/President-Elect/Secretary
- Affiliate Successful Practices Center
- College Relations & Student Chapters
- Communications
- Community/External Relations
- Conferences & Programs
- Diversity
- Exhibitors/Sponsors/Vendors
- Finance
- Foms
- Governmental & Legislative Affairs
- HR Certification Institute - Certification
- International/Global
- Leadership & Volunteers
- Legal
- Marketing
- Media/Public Relations
- Membership & At-Large
- Non-Dues Revenue Sources
- Professional Development Opportunities
- Programs & Conferences
- SHRM Foundation
- Toolkits
- Web Site Resources
- Workforce Readiness

Resources for every volunteer role – don't reinvent the wheel!



- Affiliate Successful Practices Center
 - Contains great ideas from other affiliates on Leadership | Operations | Workforce Readiness | Veterans/Military | SHAPE Idea Center | Enterprising Leadership Book
- Awards and Scholarships
 - Contains Pinnacle Award Compendium (get great ideas!) and webinars about the winning programs
- Speaker Information
 - Contains lists of speakers for your events: All Recommended Speakers from recent SHRM Conferences, Top Rated speakers from SHRM Annual Conferences, Keynote Speakers from SHRM Conferences, and Chapter Speaker Program

- **Webcasts for Volunteers**
- Archived webcasts available any time on many topics
- Operations/Volunteer Leadership | College Relations | Diversity & Inclusion | SHRM Certification | Government Affairs | Membership | SHRM Foundation | Workforce Readiness
- “Quickinars” < 20 minutes each:
 - Chapter Board Meetings | Strategic Planning | Alternative Chapter Structure
- One-hour webcasts include:
 - Engaging and Motivating Volunteers
 - Succession Planning
 - Successful Programming
 - Transitioning to a 100% Chapter
 - Leveraging Technology (I & II)
 - Working with the Media
 - Conference/Event Planning
 - Financial Management and Legal Issues for Chapters
 - Dealing with Difficult Volunteers

Under “Resources for Chapters” and “Admin / Chapter President / President-Elect / Sec’y”

- 2014 SHRM Affiliate Program for Excellence (SHAPE)
- Award Programs (*The Excel Awards, Pinnacle, Scholarships, etc.*)
- Bylaws
 - Bylaws Checklist for Chapters
 - Model Bylaws for Chapters
 - Revising Bylaws Webinar (PowerPoint only or Webinar with Sound)(April, 2011)
- Chapter Activities Checklist by Month
- Chapter Affiliation Requirements
- Chapter-by-Size Conference Call and Webinar Event Schedule (Exclusively for Chapter Presidents) 2014
- Chapter Charter
 - Template Document
 - Chapter Charter FAQs
- Chapter Code of Conduct
- Chapter Discount Program for 2014 Fall Seminars
- Chapter Leader Information Form (*Create a username and password as you begin your form.*)
- Chapter Leader Position Description
 - Full listing
 - President
 - President-Elect
 - Secretary
- Conflict of Interest Policy (Sample Courtesy of IRS)
- Directory of Chapter Management Professionals Used by SHRM Chapters
- E-blast Request (*for Super Mega chapters ONLY*)
- E-blast Request (*for 100% chapters ONLY*)
- Effective Meetings
- Fundamentals of Chapter Operations
- Give Student Chapter a Subscription to HR Magazine
- Guide to Taking Minutes
- Ice-Breaker Activities
- Installation of Officers Script
- Involving Senior-Level HR Professionals (PDF file)
- Maintaining Your Chapter's History
- Member Survey Samples
- Membership Advisory Council (MAC) Frequently Asked Questions
- Orientation Presentation for Chapter Boards - Updated for 2014
- Parliamentary Procedure Resources
 - Partnership Opportunities for Chapters - Top Ten Questions to Ask Potential Partners
- President Quick Reference
- SHRM Strategic Planning Toolkit
- Succession Planning Toolkit
- Whistleblower Policy (Sample courtesy of Nonprofit Risk Management Center)

Under “Resources for Chapters” and “Finance”

[Chapter Financial Support Payment \(CFSP\) Program](#)

[Conference Registration Cancellation Policies/Practices/Refunds \(Sample\)](#)

[Conflict of Interest Policy \(Sample courtesy of the IRS\)](#)

[Direct Deposit Request Form](#)

[Directors' & Officers' \(D&O\) Insurance](#)

[D&O Liability Insurance: From whom do you need protection? \(White Paper\)](#)

[Form 990-N FAQs](#)

[Liability Insurance Resource \(American Society of Association Executives-Endorsed\)](#)

[Guide to Chapter Financial Management](#)

[IRS Determination of Tax Exempt Status for Your Chapter \(PowerPoint only or Recorded Webinar\) \(January, 2011\)](#) For the most current versions of the instructions and forms referenced in this webinar, please visit www.irs.gov

[SAMPLE Income Statement and Balance Sheet](#)

[Treasurer Position Description](#)

[Whistleblower Policy \(Sample courtesy of Nonprofit Risk Management Center\)](#)

LeadersEdge Archived Articles

[Ten Easy Ways to Maximize Chapter Revenues](#)

[Maximize Your Chapter's Revenue](#)

[Is Your Chapter or State Council in Compliance with Current IRS 990-N Filing Requirements?](#)

[IRS Grants One-Time Extension for Filing of Form 990-N](#)

[Sponsorship or Advertising?: What Chapters Need to Know Before Creating an Offer](#)

[D&O and/or Event Insurance - Necessary or Not?](#)

Under “Resources for Chapters” and “Membership”

[2014 Core Leadership Area Conference Call and Webinar Event Schedule](#)

[2010/2011/2012/2013 Membership Summits](#)

[2013 Membership Star and Superstar parameters](#)

[100% Chapter Transition Toolkit **New!**](#)

[Application for Discounted SHRM Membership for Local Chapter Members \(PDF\)](#)

[Auditing Your Chapter Roster](#)

[Belong to a SHRM-Affiliated Local Chapter Brochure \(PDF\) *\(hard copies also available free from SHRM\)*](#)

[Chapter Affiliation Requirements](#)

[Fortune Forty Home Page](#)

[Involving Senior-Level HR Professionals \(PDF\)](#)

[Member Benefits Flyer \(PDF - Front & Back\) Updated 9/12/14](#)

[Member List Request Form](#)

[Member Survey Samples](#)

[Membership Director Position Descriptions](#)

[Chapter](#)

[State Council Membership](#)

[Membership Recruitment & Retention Toolkit \(PDF\)](#)

[Membership Marketing Tools](#)

[Non-Solicitation/Privacy Policy Model](#)

[Primary Chapter Designation Form *\(Form for at-large members to use to advise SHRM that they are members of chapters\)*](#)

[Retaining SHRM Members in Your Chapter *\(LeadersEdge article, July, 2010\)*](#)

[Sample Association Win-back Calling Script](#)

[Sample Letter to Recruit At-Large Members](#)

[Sample New Member Acquisition Mailing Template](#)

[Sample Renewal Mailing Template](#)

[SHRM Membership Application for Local Chapter Members](#)

[Webinars/Webcasts for Membership CLA Volunteer Leaders](#)

[Want to Retain Your Members? WOW 'Em](#)

 [Obtain reuse/copying permission](#)

Under “Core Leadership Areas” and “College Relations”

- [2014 Core Leadership Area Conference Call and Webinar Event Schedule](#)
- [2014 Regional Student Conferences and Case Competition](#)
- [Benefits of Serving as a Student Chapter Advisor *\(online article\)*](#)
- [Case Competition and State HRGames](#)
- [College Relations Bulletin Board](#)
- [College Relations Director Position Descriptions](#)
 - [Chapter](#)
 - [State Council](#)
- [Creating a Student Mentor Program](#)
- [Give Student Chapter a Subscription to HR Magazine](#)
- [How to Start a Student Chapter](#)
- [Organizing an Internship Program](#)
- [Role of the Student Chapter Advisor](#)
- [Role of the Student Chapter Liaison](#)
- [Student Chapter Resource Center](#)
- [Student Chapter Toolkit](#)
- [Student Programs Web Site](#)
- [Student Scholarship Opportunities](#)
- [Students and Professionals: Working Together](#)
- [Webinars/Webcasts for College Relations CLA Volunteer Leaders](#)
- [Working with Students](#)

Under “Core Leadership Areas” and “Governmental Affairs”

- [2014 Core Leadership Area Conference Call and Webinar Event Schedule](#)
- [Day Inside the Beltway Program](#)
- [Federal Legislative Resources](#)
- [Governmental Affairs Director Position Descriptions](#)
 - [Chapter](#)
 - [State Council](#)
- [HR Voice Program](#)
- [HR Voice: The Best HR Legislative Resource for HR Professionals *\(Brochure in PDF\)*](#)
- [SHRM Advocacy Home Page](#)
- [SHRM Public Policy and Position Statements](#)
- [Webinars/Webcasts for Government Affairs CLA Volunteer Leaders](#)
- [© Obtain reuse/copying permission](#)

Under “Core Leadership Areas” and “Diversity”

[2014 Core Leadership Area Conference Call and Webinar Event Schedule](#)

[Affiliate Successful Practices Center](#)

[Best Practices in SHRM Chapters and State Councils in 2009](#)

[Creating a Strategic Diversity Management Plan](#)

[Definition of Diversity and Inclusion](#)

[Diversity Director Position Descriptions](#)

[Chapter](#)

[State Council](#)

[Diversity Survey Template](#)

[Employee Engagement Diversity Survey](#)

[SHRM Diversity & Inclusion Conference & Exposition](#)

[SHRM Diversity Program Home Page \(HR Disciplines\)](#)

[SHRM's Diversity Bulletin Board/Forum](#)

[Ten Strategies for Achieving a More Diverse Chapter](#)

[Webinars/Webcasts for Diversity CLA Volunteer Leaders](#)

[When Work Works Toolkit](#)

[Archived Resources](#)

[Diversity, Inclusion and Your Local SHRM Chapter \(LeadersEdge Article\)](#)

[Employing America's Heros: What HR Professionals Need to Know About Veterans \(PDF of PowerPoint Only or Webinar with Sound\)](#) (February, 2010)

[Skill-based Diversity Training \(PDF of PowerPoint Only or Webinar with Sound\)](#) (July, 2009)

[What Today's Diversity & Inclusion Practitioners Know and Do \(Webinar with Sound\)](#) (August, 2009) A stand-alone PowerPoint version of this webinar is not available

December 14, 2011 - [PowerPoint](#) highlighted in the conference call *SHRM Diversity into 2012*

Under “Core Leadership Areas” and “SHRM Foundation”

[2014 Core Leadership Area Conference Call and Webinar Event Schedule](#)

[About the Foundation](#)

[Additional Resources for Volunteers](#)

[Chapter and State Council Pledge Form](#)

[Champions Program](#)

[Donate to the SHRM Foundation](#)

[Educational Products](#)

[Foundation Director Position Descriptions](#)

[Chapter](#)

[State Council](#)

[Fundraising Reports](#)

[How to Organize a Silent Auction](#)

[Marketing Resources](#)

[Newsletter Stories to Cut-and-Paste](#)

[Overview of the SHRM Foundation](#) *Updated for 2014*

[Resources for the Annual Campaign](#)

[Scholarships and Awards](#)

[SHRM Foundation Gift Recording Procedures](#)

[SHRM Foundation Home Page](#)

[SHRM Foundation Research Grants](#)

[SHRM Foundation Staff Contacts](#)

[SHRM Foundation Volunteer Success Guide](#)

[Webinars/Webcasts for SHRM Foundation Volunteer Leaders](#)

Under “Core Leadership Areas” and “HR Certification”

[2014 Core Leadership Area Conference Call and Webinar Event Schedule](#)

[Certification CLA Update Webinar \(Oct 16, 2014\)](#)

[Step by Step Preferred Provider Log In \(PDF\)](#)

[Three Certification Changes in 2014: New Recertification System; Birthday Rule; and Specified Business \(formerly Strategic\) Credits](#)

[2014 Changes to Recertification Process](#)

[FAQs for GPHR Body of Knowledge](#)

[2014 Business Credit](#)

[HRBP and HRMP Certifications Now Available](#)

[Approved-for-Credit Program Resources](#)

[How to Set Up a Chapter "Approved for Credit" Account with the HR Certification Institute](#)

[Getting Programs Pre-Approved for HR Certification Institute Recertification Credit \(Pre-approved Program Resources from HR Certification Institute\)](#)

[Tips for Applying for Strategic Business Management Credit](#)

[Certification Director Position Descriptions](#)

[Chapter](#)

[State Council](#)

[Certification FAQs \(including the Approved-for-Credit Program\) \(May, 2012\)](#)

[HR Certification Institute Home Page](#)

[HR Certification Institute's Social Media Engagement](#)

[HRCI/SHRMStore Recertification Credit Program \(Book Club\)](#)

[HRCI/SHRMStore Recertification Credit Program \(LeadersEdge Article\)](#)

[Frequently Asked Questions \(FAQs\)](#)

[Listing of Approved Books](#)

[HRCI Collateral Management System](#)

[Retrieving Data from the HR Certification Institute Website](#)

[SHRM California Learning System for Chapters 2014 Flyer](#)

[SHRM Learning System](#) On this page **updated for 2014**, find the following:

[SHRM Learning System for Chapters and State Councils \(Exclusive Offer\)](#)

[Customizable promotional flyer](#)

[Product overview handout](#)

[Overview presentation in PowerPoint](#)

[SHRM Learning System Program - Benefits of Chapter Partnerships with Colleges/Universities](#)

[Strategic Management Now Known as "Strategic Business Management" \(LeadersEdge Article, March 2010\)](#)

[Webinars/Webcasts for Certification CLA Volunteer Leaders](#)

[Why Certify and Why SHRM \(PPT\)](#)

Under “Core Leadership Areas” and “Workforce Readiness”

[2014 Core Leadership Area Conference Call and Webinar Event Schedule](#)

[Affiliate Successful Practices Center - Workforce Readiness Initiatives](#)

[“At Work in 2020” \(HR Magazine®\), January, 2010\)](#)

[CHOICES Program - Addressing the High School Dropout Epidemic \(PDF\) - Program Info](#)

[CHOICES \(PowerPoint with contact information from May 27, 2009 webinar\)](#)

[Not Ready to Work: The Crisis Facing Our Young People, Our Businesses and our Comr](#)

[PowerPoint from 10/2009 webinar](#)

Supplements:

Key Findings: [“The ILL-Prepared US Workforce”](#)

Key Findings: [“Are they Really Ready to Work”](#)

[New Hampshire Workforce Readiness Toolkit \(Affiliate Successful Practice Center\)](#)

[Toolkit: Ten Steps to Becoming a Military-Ready Employer](#)

[Webinars/Webcasts for Workforce Readiness CLA Volunteer Leaders](#)

[When Work Works Toolkit](#)

[Workforce Readiness Advocate/Director Positions](#)

[Chapter](#)

[State Council](#)

[Workforce Readiness Related Web Sites](#)

[America’s Promise](#)

[Junior Achievement](#)

Under “Core Leadership Areas” and “Membership”

[2014 Core Leadership Area Conference Call and Webinar Event Schedule](#)

[2010/2011/2012/2013 Membership Summits](#)

[2013 Membership Star and Superstar parameters](#)

[100% Chapter Transition Toolkit **New!**](#)

[Application for Discounted SHRM Membership for Local Chapter Members \(PDF\)](#)

[Auditing Your Chapter Roster](#)

[Belong to a SHRM-Affiliated Local Chapter Brochure \(PDF\) \(hard copies also available free from SHRM\)](#)

[Chapter Affiliation Requirements](#)

[Fortune Forty Home Page](#)

[Involving Senior-Level HR Professionals \(PDF\)](#)

[Member Benefits Flyer \(PDF - Front & Back\) Updated 9/12/14](#)

[Member List Request Form](#)

[Member Survey Samples](#)

[Membership Director Position Descriptions](#)

[Chapter](#)

[State Council Membership](#)

[Membership Recruitment & Retention Toolkit \(PDF\)](#)

[Membership Marketing Tools](#)

[Non-Solicitation/Privacy Policy Model](#)

[Primary Chapter Designation Form \(Form for at-large members to use to advise SHRM that they are members of chapters\)](#)

[Retaining SHRM Members in Your Chapter \(LeadersEdge article, July, 2010\)](#)

[Sample Association Win-back Calling Script](#)

[Sample Letter to Recruit At-Large Members](#)

[Sample New Member Acquisition Mailing Template](#)

[Sample Renewal Mailing Template](#)

[SHRM Membership Application for Local Chapter Members](#)

[Webinars/Webcasts for Membership CLA Volunteer Leaders](#)

[Want to Retain Your Members? WOW 'Em](#)

Under “Resources for Chapters” and “Admin . . .” then “Chapter Activities Checklist by Month” with **LINKS to RESOURCES!**

SHRM Chapter Activities by Month

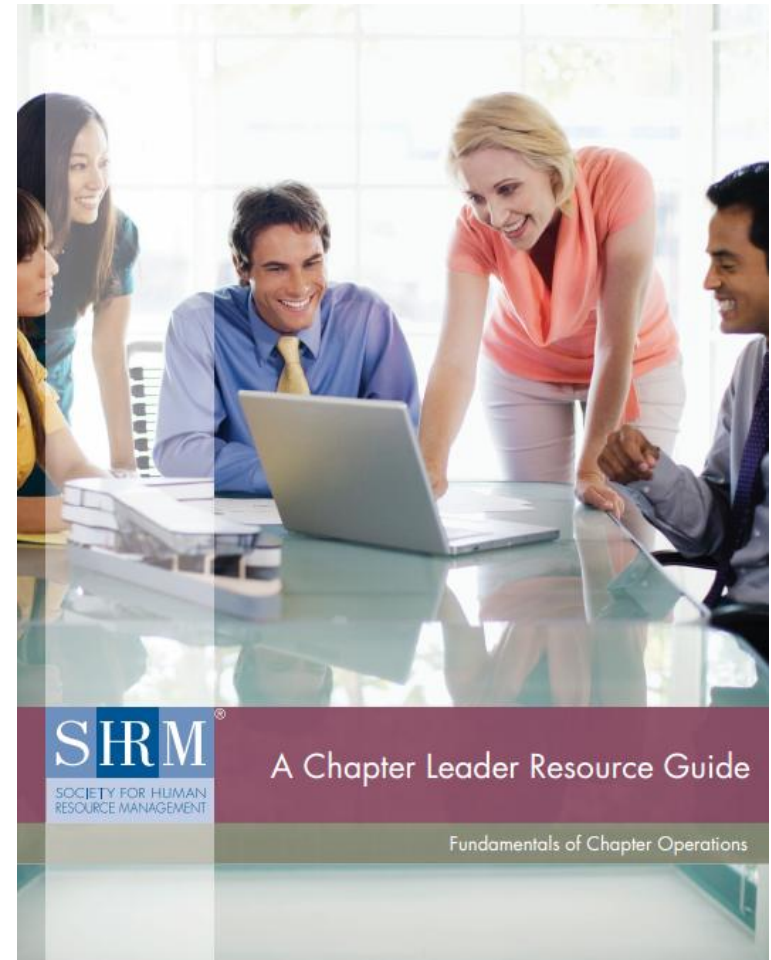
SHRM is providing chapter presidents with this monthly checklist to help you in your planning. You will see that each month, there are required (or date-sensitive) activities, recommended activities, and items for review. If your organization is on a fiscal year, use January as your starting month, but also check each month since there are certain deadlines and initiatives that happen during specific months.

	Required	Recommended	Review
January	<ul style="list-style-type: none"> Hold planning meeting with new board using SHAPE planning workbook—be sure to include a succession planning discussion. Participate in your state leadership conference if one is held (required for SHAPE Award). Contact your State Council Director for more information. Complete the SHAPE chapter online form by 1/31—plan for at least two people to have the data to complete it on time in case one person is unavailable. Ensure that the chapter president is a member of SHRM throughout the year. If your bylaws require that other chapter board members are SHRM members, ensure that they remain SHRM members throughout the year. If you hold a chapter conference or any educational event for 200+ participants, invite your Field Services Director (FSD) to speak at a session; also offer your FSD 10-15 minutes of time at the podium to address the full group; FSD should have a prime/visible booth location if you have an exhibit hall. (Required in SHAPE.) Notify your FSD of key chapter events for the year, such as conferences, annual award ceremonies, strategic planning meetings, and any other events you might want SHRM staff to attend. If there have been any changes in your volunteers, report them to your Member Engagement Associate. Keep SHRM informed of any changes to e-mail addresses, contact information, and role changes as they occur. Promote the SHRM Certification program and encourage members to become certified. Set up or determine the feasibility of having a local study group or provide certification prep materials and available courses to your members. 	<ul style="list-style-type: none"> Fill your volunteer leader positions, and/or solicit volunteers. Develop and communicate your chapter's short- and long-term goals. Provide the SHRM Fundamentals of Chapter Operations Manual to all volunteers. Hold new leader orientation/transition using the slides and workbook in the VLRC. Provide a volunteer job description to the board and your expectations for the year. Ask your membership chair to work with the state membership director to make sure they have a membership campaign scheduled and that volunteers are aware of the membership recruitment/retention resources available from SHRM. Use the “SHRM as a Resource” presentation to show your members the value of SHRM membership. This can be done at a member meeting or new member orientations. Mark your calendars for key events during the year, such as the conference calls for chapters by size, Core Leadership Area (CLA) calls and webinars, state council meetings (chapter presidents should attend these meetings), state leadership events, SHRM conferences, etc. District directors should be reaching out to chapter presidents to provide a presentation on SHRM member benefits, help chapter with orientation and planning meetings, etc. Please be responsive to your State Council Director and District Director. Prepare an annual budget—it is recommended that you provide a budget for all of your committees/board members. Set up process for tracking member retention—refer to the Membership CLA section in the VLRC. Encourage your board and committee members to participate in SHRM Connect groups to share practices and ideas. Super mega and 100% chapters are allowed two e-blasts per quarter to promote their activities to all SHRM members in the chapter's ZIP code range. Complete the online request form in the VLRC. Use the quarterly rolling PowerPoint with updates from SHRM at your chapter meetings during networking time. Find the slides in the VLRC under “Communications.” Submit your monthly program for recertification credits with the SHRM Certification Preferred Provider Program. 	<ul style="list-style-type: none"> Have all new committee chairs and board members review the resources/webinars on the VLRC. Ensure that board members carefully review and understand the chapter bylaws; consider changes as needed throughout the year. You can review SHRM's Bylaws Checklist and Model Bylaws. Review the chapter's charter with your board (if you cannot locate this document, you can request it from your Member Engagement Associate at SHRM). Provide the Guide to Financial Management to treasurer and other key volunteers (all should review it). Be sure that you are receiving e-mails from SHRM Volunteer Communications; if you have ever opted-out of a SHRM e-mail, you might not receive important information about your volunteer role. Review Parliamentary Procedure resources. Have the chapter secretary review the following resources: Guide to Taking Minutes and Maintaining Your Chapter's History. The chapter president should review the online resources for running effective meetings.

Under “Resources for Chapters” and “Admin . . .” then “Fundamentals of Chapter Operations”

All volunteers on your board should have a copy and review it carefully

Contains info on: Staff contacts, governance and bylaws, incorporation, membership rosters, affiliation requirements, using e-blasts, chapter operations, and much more



Under “Resources for Chapters” and “Finance” then “Guide to Financial Management”

All chapter officers should review this guide

- Operating Considerations
- Methods of Accounting and Financial Reporting
- Checklist of Internal Controls Over a Chapter’s Cash Transactions
- Auditing
- Financial Maintenance Questionnaire
- Investments
- Tax Filings
- Unrelated Business Income
- Lobbying Activities
- Travel and Meal Reimbursement
- Record Retention Guidelines
- Appendix–Financial Maintenance Questionnaire



Under “Resources for Chapters” and “Membership” then “Membership Recruiting & Retention Toolkit”

Contents:

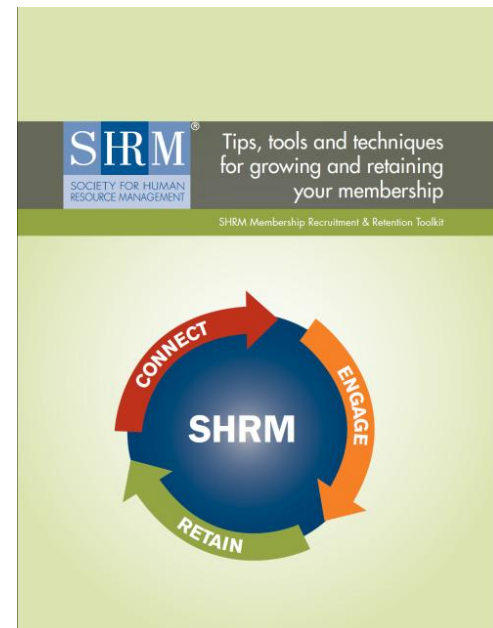
Recruitment

- Why HR professionals don't join chapters (survey results)
- Determining key prospects
- Setting Your strategy
- Marketing materials, Tools, Templates and resources available from SHRM

Retention

- Defining retention
- The Cost of retention
- Continuous marketing
- The renewal process
- Determining why members don't renew

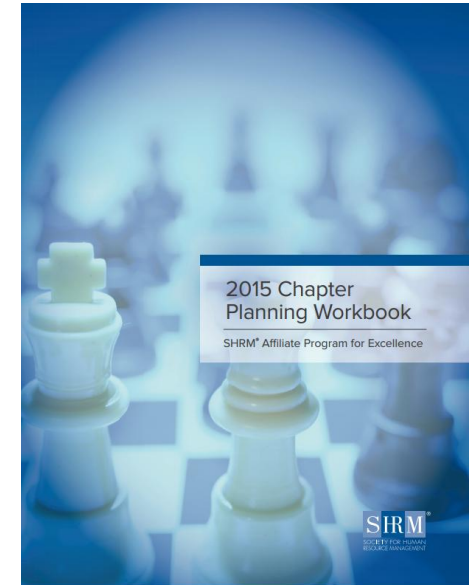
PLUS: Customizable letter templates, scripts, talking points, surveys, and calculations



On the main VLRC page, under “SHAPE Center”

SHAPE: SHRM Affiliate Program for Excellence

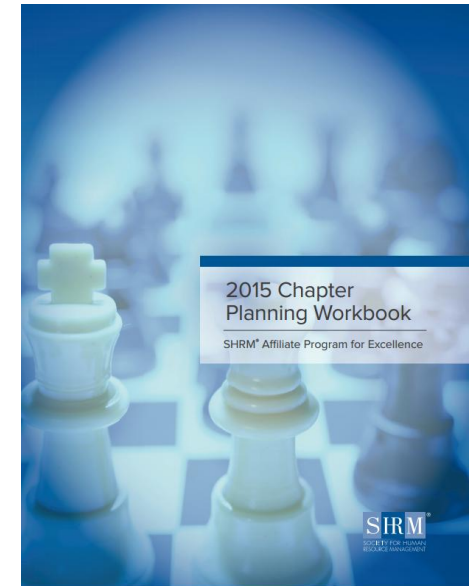
- Both a planning tool and an evaluation tool
 - Covers calendar year
 - Reporting tool for SHAPE award
 - Must be filed with SHRM by 1/31 to receive CFSP
 - Need to determine now who will complete
 - Complete **online only**
 - 2015 Planning book available
- There will be a webinar about the changes to the 2015 SHAPE



On the main VLRC page, under “SHAPE Center”

SHAPE: SHRM Affiliate Program for Excellence

- Section 1: Basic Requirements (Must be completed by ALL chapters to remain affiliated)
- Section 2: Community-Based Chapter Initiatives
- Section 3: SHRM Affiliate Engagement
- Section 4: Measures of Success
- Appendix A: Resources
- Appendix B: Sample Year-End Report Form
- Four award levels: Bronze, Silver, Gold, and Platinum



You must have submitted your CLIF by December 1
to qualify for any SHAPE award

Chapter Financial Support Payments (CFSP)

- The CFSP Program returns a portion of each SHRM member's dues to the chapter through this program.
- To be eligible for CFSP consideration, the chapter must:
 - Submit a completed SHAPE Year-End Report by 1/31 of each year and your membership roster if requested.
 - Meet the applicable membership affiliation requirements.
 - Have a chapter president who is a SHRM member in good standing throughout his/her term of office.
 - Have SHRM-approved ratified bylaws on file at SHRM.
 - Have the payment direct-deposited.



Chapter Financial Support Payments (CFSP)

- SHRM pays chapters and councils several million per year in financial support.
- Pays each state council at least \$2000 per year based on SHRM membership in state. (4,000 SHRM members in state = \$4,000; 1,500 members in state = \$2,000)
- The Chapter Financial Support Payment (CFSP) Program returns a portion of each professional (non-student) SHRM national member's dues to the chapter via a quarterly payment for 100% chapters (those chapters who require all members to be members in good standing of SHRM) or a twice-a-year payment for non-100% chapters.

Chapter Financial Support Payments (CFSP)

Example:

***Chapter's
12/31 SHRM
Membership Count***

<i>2014</i>	<i>250</i>
<i>2013</i>	<i><u>-200</u></i>
<i>Difference</i>	<i>50</i>

Net Gain Payment (50 X \$25) = \$1,250

Chapter Financial Support Payments (CFSP) for Certification

- Must be a chapter/council in good standing as outlined in the 2015 SHAPE program
- Two-year program starting January 1, 2015 and ending December 31, 2016
- Chapters will receive a **\$20 payment** for every SHRM member **in their chapter** who holds a SHRM certification at the end of the calendar year for 2015 and again in 2016.
- State Councils will receive a **\$10 payment** for every SHRM member (**in-chapter and at-large**) who has a SHRM certification in their state at the end of the calendar year for 2015 and 2016.
- Payments will be made regardless of how the SHRM certification was earned (tutorial or taking the exam).



Membership CLA

Kathryn Medina, SPHR
Executive Director
SHRM member since 2005



Member Definitions

At-large Members

- At-large member is an individual who is a member of SHRM but is not affiliated with a local chapter.
- Recruiting at-large members to your chapter is a great way to increase SHRM membership in your chapter.
- Online membership application includes a required field for indicating chapter membership.

Local Members Only (LMOs)

- An LMO is an individual who belongs to a local chapter but is not a SHRM member.
- Promote benefits of joining SHRM to your LMOs.
- Discount offered to first-time SHRM members via a promotional code **(0118)**.
- Strengthens partnership between SHRM and the chapter.

Member Definitions

Primary Members

- Member of more than one chapter (multi-member) who designates one chapter as the primary chapter (this chapter receives CFSP for the member).

Multi-Members

- Member of SHRM who maintains membership in multiple chapters. Primary chapter affiliation is with another SHRM affiliate chapter. A chapter would receive credit for chapter affiliation percentage purposes for multi-members but not for CFSP.

Primary Chapter Designation Form **submission deadline**

- From January – November, forms must be received by the **5th business day prior to the end of the month to be processed.**
- For December, must be received by December 15th to be processed by the end of the year.
- While a SHRM member may belong to more than one affiliated chapter, **only one chapter may be designated as that member's primary chapter.** The member is free to change that designation as he/she wishes. Primary Chapter Designation Forms are signed directives from the member to SHRM authorizing SHRM to change his/her primary chapter designation.
- The form is completed by the member and faxed or e-mailed to SHRM. Upon receipt of the executed form, the member's primary chapter will be changed. To ensure changes are made during the appropriate month, submission deadlines are in place.

Resources from SHRM

- ***Membership Recruitment and Retention Toolkit***
- Lists to assist you in contacting at-large members in your chapter area via mail
- State Council/Chapter Successful Practices
- Current data – monthly membership report of SHRM members in your chapter
- Webcasts and conference calls to share practices and challenges with other volunteers and staff
- Recognition of top chapters in growing their SHRM membership (Star and Superstar awards)
- Other resources to assist you in the membership section of the VLRC
- SHRM sends e-mails and mailings to at-large members about local chapters
- SHRM online membership application has box to fill in chapter membership
- E-blasts for 100% and Super Mega chapters and state councils

Membership Awards

1% - 2.99%
STAR

3% or more
SUPERSTAR



Membership Reports

Sent to State Directors, State Membership Directors, Chapter Presidents

CMPS⁹⁵

	Chapter Name	Dec-13	Dec-14	Change from Dec 13	% change from Dec 13	Star/SuperStar Designation for Month	Chapter Size	Total # Mbrs in Chapter	# of Multi Members	# LMOs in Chapter	Chapter Affiliation %age	2013 Excel Award
6	Birmingham SHRM	328	346	18	5.49%	★★★	MG	583	15	222	61.92%	Silver
7	SHRM-Montgomery	65	66	1	1.54%	★★	M	121	7	48	60.33%	Silver
8	Wiregrass HR Mgmt Assn.	25	24	-1	-4.00%		S	49	1	24	51.02%	N/A
9	Tennessee Valley Chapter of SHRM	39	45	6	15.38%	★★★	S	78	4	29	62.82%	N/A
10	East Alabama SHRM	35	37	2	5.71%	★★★	S	69	4	28	59.42%	Bronze
11	Mobile SHRM	109	110	1	0.92%		M	248	14	124	50.00%	Silver
12	North Alabama Chapter of SHRM	261	263	2	0.77%		L	402	5	134	66.67%	Silver
13	Calhoun County SHRM	43	37	-6	-13.95%		S	45	0	8	82.22%	N/A
14	Northwest Alabama SHRM	12	-	-	-		S	17	0	-	-	N/A
15	Tuscaloosa HR Professionals	59	58	-1	-1.69%		S	85	1	26	69.41%	Silver
16	Marshall County HR Mgmt. Assn.	25	24	-1	-4.00%		S	52	0	28	46.15%	N/A
17	Cullman Area-SHRM	19	24	5	26.32%	★★★	S	26	0	2	92.31%	N/A
18	Baldwin County SHRM	39	37	-2	-5.13%		S	71	2	32	54.93%	N/A
19	Escambia County SHRM	15	13	-2	-13.33%		S	25	1	11	56.00%	N/A
20	Shoals Chapter - SHRM	52	64	12	23.08%	★★★	S	65	0	1	98.46%	N/A
21	Grand Total	1,126	1,148	22	1.95%	★★★		1,936	54	734	62.09%	
27	ALABAMA	Dec-13	Dec-14	Chg 2013	% chg	In Chap %age						
28	SHRM Members in Chapters	1,126	1,148	22	1.95%	41%						
29	SHRM Members At-Large	1,686	1,666	-20	-1.19%	59%						
30	SHRM Members in State	2,812	2,814	2	0.07%							

- Under 51% ?
- Under 25 SHRM members ?
- Increase both by getting LMOs into SHRM
- Percentage of members in chapters ?

At the bottom of the report are tabs for each state in the region. Compare year-end numbers with current month. Also note member growth/loss and percent change. PLEASE NOTE that LMO numbers are captured only when chapters update them with SHRM, during an audit. LMO numbers on this report will NOT CHANGE throughout the year.



Membership Reports – Region Roll-Up

Sent to State Council Directors, State Council Membership Directors, Chapter Presidents & CMPs

5	6 State	SHRM Members in Chapters			SHRM Members At-large			SHRM Members in State		
		Dec-13	Dec-14	% Growth	Dec-13	Dec-14	% Growth	Dec-13	Dec-14	% Growth
8	ALABAMA	1,126	1,148	1.95%	1,686	1,666	-1.2%	2,812	2,814	0.1%
9	Bahamas	31	40	29.03%	87	89	2.3%	118	129	9.3%
10	Bermuda	42	37	-11.90%	64	57	-10.9%	106	94	-11.3%
11	Puerto Rico	239	927	287.87%	275	282	2.5%	514	1,209	135.2%
12	FLORIDA	4,743	4,733	-0.2%	9,061	9,409	3.8%	13,804	14,142	2.4%
13	GEORGIA	1,898	1,762	-7.2%	5,680	5,789	1.9%	7,578	7,551	-0.4%
14	KENTUCKY	1,016	928	-8.7%	2,128	2,160	1.5%	3,144	3,088	-1.8%
15	MISSISSIPPI	433	431	-0.5%	775	733	-5.4%	1,208	1,164	-3.6%
16	NORTH CAROLINA	2,042	1,936	-5.2%	4,782	4,875	1.9%	6,824	6,811	-0.2%
17	SOUTH CAROLINA	996	914	-8.2%	1,999	2,105	5.3%	2,995	3,019	0.8%
18	TENNESSEE	2,215	2,185	-1.4%	3,018	3,066	1.6%	5,233	5,251	0.3%
19	VIRGINIA	3,740	4,159	11.2%	9,999	9,547	-4.5%	13,739	13,706	-0.2%
20	WEST VIRGINIA	295	298	1.0%	590	576	-2.4%	885	874	-1.2%
22	Region	18,816	19,498	3.6%	40,144	40,354	0.5%	58,960	59,852	1.5%
26										
27		LMOs in State								
28		Dec-13	Dec-14	% Growth						
29										
30	ALABAMA	747	734	-1.74%						
31	BAHAMAS	12	18	50.00%						
32	BERMUDA	75	80	6.67%						
33	PUERTO RICO	943	0	-100.00%						
34	FLORIDA	1,030	1,104	7.18%						
35	GEORGIA	1,536	1,733	12.83%						
36	KENTUCKY	581	672	15.66%						

Report shows SHRM members in chapters, at-large in state, and SHRM members in state.

Note the red numbers indicate negative numbers, or member losses.



Value of Chapter Membership

- Brochure is free to chapters and downloadable to hand out at meetings
- Can request hard copies as well
- Explains the value of chapter membership to SHRM members
- Use it to contact at-large members to invite them to become chapter members

- HR professionals and companies in your community. This will create a network for you to tap into when gathering information on how other local organizations handle various human resource situations, procedures, policies, etc.
- Local professional development opportunities to improve your HR competencies and advance yourself professionally.
- Up-to-date information on pending federal and state legislation that may impact your company's operations.
- HR generalists and specialists who provide information that might otherwise be difficult and/or expensive to obtain.
- Relationships and contacts with other local companies.
- Contemporary, successful practices to make your organization more efficient, increase employee commitment, and help line managers carry out business strategy.
- Detailed, updated information on state and local labor market conditions and issues.
- The opportunity to obtain PHR/SPHR/GPHR recertification credits for attending chapter programming that qualifies for HR Certification Institute credits.
- Leadership skills development opportunities. You can take on a volunteer leadership role in a local chapter, for example.

Q: How do I join a chapter or obtain more information on the location of a chapter?

A: Contact the chapter via their Web site or contact information. Links and contact information can be found at www.shrm.org/chapters. Select Professional or Student Chapters on the left bar then click on your state to view all SHRM-affiliated chapters in the state.

Q: As a SHRM member, am I automatically a member of a local chapter?

A: No. SHRM membership is separate from membership in your local chapter. Each chapter has its own membership application process and dues structures. While there are more than 575 locally affiliated SHRM chapters, they are autonomous entities in their operations and membership requirements. To become a member of your local chapter, you will need to apply for membership directly with that particular chapter.

Q: As a member of my local chapter, am I automatically a SHRM member?

A: No. Please see the previous answer. To join SHRM, please visit www.shrm.org/join.

Q: When I join a local chapter, should I notify SHRM?

A: Yes! Upon membership in your local chapter, please contact the SHRM Member Relations Team at SHRM.memberrelations@shrm.org or (800) 283-SHRM to update your member record. This is important because your local chapter receives financial support from SHRM based on your membership.

Q: Can I belong to more than one SHRM chapter?

A: Yes. You can belong to as many chapters as you desire, but one will be considered your "primary chapter" for receiving financial support from SHRM.

Membership in a SHRM-affiliated chapter means access to a local network of HR professionals, as well as professional development programs.



E-Blasts – USE THEM!

- SHRM offers **State Councils, Super Mega chapters, and 100% chapters** the opportunity to reach at-large members via e-mail eight times per year (two per quarter)
- Use online request form in the VLRC
- SHRM sends the e-blast on your behalf and will make edits as necessary
- State Councils also receive e-blasts for announcing the state conference to members in their own state

- SHRM offers a one-time-only benefit of a free one-year continuation of membership to any current member who has been downsized
- Must already be a member of SHRM
- Contact SHRM's Member Care Department for more information
- Consider offering this option to your own members – great for retention!

Other CLAs: Certification
College Relations
Diversity
Governmental Affairs
SHRM Foundation
Workforce Readiness



Bruce Elliot
Manager, Compensation & Benefits
SHRM member since 2011

SHRM Certification

We believe these new credentials will become the globally recognized **standard of excellence** in HR.



We've created the SHRM-CP and SHRM-SCP to:

- Encourage HR professionals to acquire the knowledge and behaviors that drive effective performance and career success, and contribute to positive organizational outcomes
- Establish a certification that is highly relevant to employers, and meets the needs of business;
- Grow certification in the HR profession; and
- Create a new and universal standard for HR.

For Existing Certificants

From **January 5, 2015, to December 31, 2015**, holders of a valid HR generalist certification can be eligible to obtain the **SHRM-CP** or **SHRM-SCP**.

Credential holders will complete a simple three-step process:

1. **Agree** to abide by the SHRM Code of Ethics;
2. **Affirm** that you hold a valid HR credential; and
3. **Complete** the online tutorial on HR competencies.

Holders of credentials like PHR & HRBP* will be eligible for:



Holders of senior-level credentials like SPHR, GPHR, & HRMP* will be eligible for:



You are not required to give up your existing credentials.

Credentials must be earned by January 31, 2015, in order to be eligible for the three-step pathway process.

Individuals interested in pursuing certification this year should **continue preparations** and **take an HR general certification exam (e.g. PHR/SPHR/GPHR exam)** prior to January 31, 2015.

- If you **pass the exam**, you will be eligible to receive the new SHRM certification by completing the simple three-step process.
- If you purchase the 2014 SHRM Learning System this year, and take the exam it supports, **but don't pass**, you will be eligible to receive the new version of the SHRM Learning System that supports the SHRM-SCP or SHRM-CP next year **at no cost** following registration for the May-July 2015 SHRM-CP or SHRM-SCP testing window.
- If you purchase the 2014 SHRM Learning System this year, and decide not to take your exam, you will be eligible to receive the new version of the SHRM Learning System next year **at no cost** following registration for the May-July 2015 SHRM-CP or SHRM-SCP testing window.

Streamlined Recertification Process

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Broad
Opportunities for
Qualifying
Activities

User-Friendly, Job-
Related
Requirements

Streamlined
Preferred
Provider Program

SHRM's streamlined approach to recertification includes:

- 60 Professional Development Credits (PDCs) based on the SHRM BoCK;
- Credits awarded for Advance Your Education, Advance Your Organization, and Advance Your Profession;
- Greater emphasis placed on job-related experiences and projects;
- No distinction between Strategic & General Business Credits; and
- State Councils, Chapters, and Educational Partners in good standing are eligible to become Preferred Providers at no cost.

Once you earn the new SHRM credentials,
you will begin a **three-year** recertification cycle.

Recertification Credits

Category	Description/Examples	Maximum Number of Professional Development Credits (PDCs)
<p>Advance Your Education</p>	<p>Continuing education such as:</p> <ul style="list-style-type: none"> ○ Conferences ○ College courses ○ Seminars ○ e-Learning (Instructor-Led and Self-Directed) ○ Chapter programs ○ Webcasts ○ Audiocasts ○ Podcasts 	<ul style="list-style-type: none"> ○ No maximum for instructor-led PDCs ○ Maximum of 30 PDCs for self-directed programs like webinars
<p>Advance Your Organization</p>	<p>Work projects endorsed by supervisor which support organizational goals and advance or demonstrate capabilities in one or more HR competency.</p>	<ul style="list-style-type: none"> ○ Maximum of 20 PDCs per cycle
<p>Advance Your Profession</p>	<p>Thought leadership and volunteer activities such as:</p> <ul style="list-style-type: none"> ○ Professional membership ○ Volunteer leadership ○ Speaking at conferences ○ Writing and Research 	<ul style="list-style-type: none"> ○ Maximum of 30 PDCs per cycle

SHRM Preferred Provider

- Chapters and State Councils are SHRM Preferred Providers at NO COST
- Award Professional Development Credits (PDCs) without pre-approval from SHRM
- Publicize that you are a SHRM Preferred Provider
- Use the logo on your materials
- Include your programs in a searchable database
- Be listed in a directory of SHRM Preferred Providers

For more info: www.shrm.org/communities/volunteerresources/pages/preferred-provider-resources.aspx



SHRM Preferred Provider

- List of Alabama chapters and Preferred Provider status (those not signed up are highlighted in yellow):

BIRMINGHAM SHRM
SHRM-MONTGOMERY
WIREGRASS HUMAN RESOURCE MGMT. ASSN.
TENNESSEE VALLEY CHAPTER OF SHRM
EAST ALABAMA SHRM
MOBILE SHRM
NORTH ALABAMA CHAPTER OF SHRM
CALHOUN COUNTY SHRM
TUSCALOOSA HR PROFESSIONALS
MARSHALL COUNTY HR MGMT. ASSN.
CULLMAN AREA-SHRM
BALDWIN COUNTY SHRM
ESCAMBIA COUNTY SHRM
SHOALS CHAPTER - SHRM

For more info: www.shrm.org/communities/volunteerresources/pages/preferred-provider-resources.aspx

SHRM has established the **SHRM Preferred Provider Program** to give organizations that offer education, training and/or other HR-related Competency and Knowledge programming the opportunity to award PDCs, without pre-approval by SHRM, during a 2-year period.

Benefits

- Award PDCs for individual programs without pre-approval from SHRM
- Market as SHRM Preferred Provider; use Preferred Provider seal on materials
- Include program offerings in a searchable database
- Listed in a directory of SHRM Preferred Providers

Qualifications

- Resources, facilities, and administrative support
- Offer appropriate high-quality programming
- Address the HR Competencies and/or Knowledge Domains outlined in the SHRM BoCK
- Describe learning objectives and Competencies/Knowledge areas to be taught
- Program lead must have proven expertise in the field
- Operating for one year and previously offered training

Example Topics for Competency Programming

COMPETENCIES

Leadership & Navigation

- Improving negotiation effectiveness
- Leading change

Ethical Practice

- Business ethics
- Dealing with unethical behavior or conflicts of interest

Business Acumen

- Advancing business acumen
- Understanding organizational metrics

Relationship Management

- Customer relationship management
- Managing internal and external relationships

Consultation

- Effective consultation
- Applying creative problem solving

Critical Evaluation

- Critical thinking
- Data analysis

Global & Cultural Effectiveness

- Cross-culture and cross-border issues
- Global strategic leadership

Communication

- Communicating up, down and across the organization
- Constructive feedback for developmental opportunities

SHRM Certification Marketing Tools

- SHRM has a fantastic landing page that hosts the marketing resources Chapters/State Councils can download and use immediately.
- The URL is www.shrmcertification.org/learning/chaptermarketing. We have provided details on how to use each of these tools too.
- Tile ad: post on your sites to promote cert prep.
- Testimonial video: The files to download one of our videos to post on your site (more are coming!).
- The Certification Presentation: Updated and added talking points for you to present info during meetings if SHRM staff isn't available.
- [Top 5 Benefits To Your Organization Flyer \(PDF\)](#)
- [2015 SHRM Preferred Provider Program Guide: SHRM Chapters and State Councils \(PDF\)](#)

SHRM Certification Marketing Tools

- www.shrmcertification.org/learning/chaptermarketing -- **New Videos!**

SHRM CERTIFICATION

THE NEW CREDENTIAL FOR HR PROFESSIONALS

Who Is Eligible For The SHRM Certifications?

<https://www.youtube.com/watch?list=UU7GCENkS0h2oiYiz-bJGbjw&v=suSOVvVuaRY>

Already Certified? Learn About The Online Tutorial Pathway To Obtain Your SHRM-CP or SHRM-SCP.

https://www.youtube.com/watch?v=hMX9H_aSZeg

How Do I Prepare For The SHRM-CP and SHRM-SCP Exams?

<https://www.youtube.com/watch?v=GtnvNgSLQ7k>

Top 5 Ways Your Employer Will Benefit From Your SHRM-CP or SHRM-SCP Certification.

<https://www.youtube.com/watch?v=RW0XiQOmLRI>

How Do I Maintain my SHRM-CP or SHRM-SCP Through Recertification?

<https://www.youtube.com/watch?v=24UUqom5obQ>

Testimonial Videos:

Advancing HR

<http://youtu.be/ceFuGB06F8E?list=PLJQbMODb5Vra-0SfJUv1UJGW6xKZyHOfm>

Value for Today's Employer

<http://youtu.be/8JWX653Oqzg?list=PLJQbMODb5Vra-0SfJUv1UJGW6xKZyHOfm>

Roadmap for the HR Profession

<http://youtu.be/SSO--brJhO8?list=PLJQbMODb5Vra-0SfJUv1UJGW6xKZyHOfm>

To form study groups for certification preparation, SHRM can assist by providing your chapter with discounts on SHRM Learning System materials. Our chapter package includes:

Facilitator Kit

Includes an instructor version of the learning modules, Instructor Resource Book, participant slides and group reports.

Regular Price

Member/Nonmember: \$850

Special Discount*

**Chapter/State Councils:
\$500**

Participant Kit**

Includes learning modules and online learning center activities.

Regular Price

**Member: \$695
Nonmember: \$870**

Special Discount*

**Chapter/State Councils:
\$460**

** The purchase of a facilitator kit and a minimum of five (5) participant kits is required to qualify for the special introductory discount. Special discount prices also apply if additional kits are purchased. ** A participant kit must be purchased for each study group participant.*

This offer is for chapter or state council hosted study group programs only. Kits cannot be individually resold to non-group participants.

The 2015 SHRM Learning System offers:

- A proven system designed specifically for adult learners
- A long and established track record of helping HR certification candidates beat the certification exam average pass rates
- Companion instructor materials to help facilitate a course
- Chapters can partner with colleges or hold their own study groups
- NEW Award from SHRM for listing college/university programs for your state on your chapter website



College Relations

Over 200 affiliated student chapters and more than 15,000 student members.

members.

Membership Center

- [Join SHRM as a Student Member](#)
- [Renew Your Student Membership](#)
- [Convert to Professional Membership](#)
- [Advisor Membership](#)
- [Student Membership FAQs](#)
- [Student Member Benefits](#)
- [Update your Contact Information/ Profile](#)

Student Member Resources

- [Learning Resources: Case Study Student Workbooks](#)
- [Career Center](#)
- [SHRM StudentFocus](#)
- [Student Conferences](#)
- [Case Competition Information](#)
- [SHRM Foundation Scholarships](#)

Chapter/Advisor Resources

- [Chapter Resource Center](#)
- [Advisor and Volunteer Resource Center](#)
- [Chapter Awards](#)
- [Chapter Affiliation Guide](#)
- [Active Chapter Status Requirements](#)
- [Re-Affiliation Guide](#)

Student Chapters

[Student Chapter Information Form](#)

DUE JUNE 1st

[2014-2015 Merit Award Planning Workbook](#) - Now available!

All chapters must submit a minimum of section 1 by April 15th.

Use the [Chapter Roster Update form](#) to submit roster changes.

Chapter Advisor Webinars

Recorded Webinars

[August 28, 2014 Webinar](#)

Upcoming Advisor Webinars

November 13, 2014 @ 3:00pm EST

Exams & Scholarships

Register for the SHRM [Assurance of Learning Assessment](#)

SHRM Foundation Scholarship Period - NOW OPEN. [Apply](#) by November 1st.

Internships

SHRM Alliance with Internships.com

2015 Student Case Competitions & Career Summits

- East, Central, West
 - No regional boundaries
 - Primary focus on case competition
 - Number of teams expanded to 28
 - Virtual prep for competition
 - Written summary will be judged virtually
 - Teams present oral presentation onsite
 - Educational sessions will be offered through 3 keynote speakers
- *For more info, go to* <http://conferences.shrm.org/student-conferences>

2015 Student Case Competitions & Career Summits

- Registration opened in December
- Support the students
- Volunteer, speaker, and sponsorship opportunities will be available for chapters/state councils

- **East Division**
March 20-21, 2015
Baltimore, MD

- **Central Division**
April 24-25, 2015
Covington, KY
(Cincinnati, OH metro area)

- **West Division**
March 13-14, 2015
Ontario, CA

Governmental Affairs

- **State-level** Legislative Directors are eligible (one per state) to attend the SHRM Legislative Conference in March at no cost. Watch your e-mail inbox for more information about volunteer registration.
- SHRM covers the registration and hotel; state council covers travel.
- March 23-25, 2015



SHRM Foundation

- **Why support the SHRM Foundation?**
- Conducts and funds research on HR topics
- Is supported by tax-deductible donations from SHRM members
- Supports scholarships, SHRM chapter educational matching grants and other educational initiatives
- Toolkit available for chapter/state Foundation chairs at www.shrm.org/foundation
- Provides a DVD series that can be used for chapter programs; pre-approved for credit

SHRM[®]
Foundation
Shaping the future of HR

- **NEW!** From Local to Regional to Global Player: The Evolution of Aramex International
- Dollar General: Serving Others--Dollar General's Commitment to the Military Community
- Ernst and Young: Creating a Culture of Flexibility
- Doing Well by Doing Good: Global Sustainability at Aditya Birla Group
- Once the Deal is Done: Making Mergers Work
- World Economic Forum: Creating Global Leaders
- Seeing Forward: Succession Planning at 3M
- Trust Travels: The Starbucks Story
- Ethics: The Fabric of Business
- Fueling the Talent Engine: Finding and Keeping High Performers
- HR in Alignment: The Link to Business Results
- HR Role Models
- www.shrm.org/about/foundation/products/Pages/SHRMFoundationDVDs.aspx



Count for recertification credits as chapter programs!

Become a SHRM Foundation Chapter Champion

- Designate a SHRM Foundation Liaison for your chapter, tasked with educating chapter members about the purpose and initiatives of the SHRM Foundation, organizing events and fundraisers to benefit the SHRM Foundation and communicating with the SHRM Foundation staff. This role may be combined with another volunteer leader role.
- Hold at least one fundraising event to benefit the SHRM Foundation.
- Conduct a Chapter Leadership Campaign to encourage chapter board members to lead by example by making individual donations of at least \$25 each with an optimal goal of 100% participation.
- Increase your chapter's total contribution to the SHRM Foundation over last year's contribution.
- **All donations must be received during the calendar year in which you want them to count toward your SHAPE goals; late submissions of donations cannot count for the prior year.**

THANK YOU for volunteering

You keep SHRM successful

We grow because of YOU!

Questions?

Discussion?

Shelly.Trent@SHRM.org

Dorothy.Knapp@shrm.org

THANK YOU!

(Please note that these slides are copyrighted material and may only be distributed to an audience at a SHRM speaker presentation. Further distribution is not allowed, except with permission by SHRM.)