



CHAPTER MANAGEMENT PLAN

A: Importance to the Chapter

B: Performance of Chapter

The *Chapter Management Plan (CMP)* is a **draft document** designed to lead HFTP chapter officers through a process of self-evaluation and goal setting. To begin, a chapter must first evaluate its current status and past progress to determine what areas are in need of improvement. The following *Chapter Self Evaluation* was created to assist chapters in this process. Ten chapter program areas have been identified, which cover activities deemed central to the successful performance of your chapter. Each activity should be viewed within the context of your chapter's demographics, i.e. size, availability/ distribution of members, economics, available resources, etc.

Each officer should be given a copy of the *Chapter Self Evaluation*. These can be completed either prior to a goal setting/strategic planning meeting or can be done in a group. Due to time constraints it may be beneficial to have each officer fill out the evaluation individually and then have everyone discuss their results. The group can then create an overall evaluation that combines everyone's opinions. Filling out the evaluation individually will also allow officers to be completely honest and decrease the likelihood of having other people's opinions influence them.

COMPLETING THE CHAPTER SELF EVALUATION

1. Officers will need to complete both columns of the *Chapter Self Evaluation*.

Column A (Importance to Chapter)

As chapter officers you are most qualified to assign a numerical value to each activity listed, which represents the relative importance of that activity to your chapter. Rate each activity on a scale of 4 (very important/very relevant to chapter success) to 0 (not important/not relevant to chapter success).

Column B (Performance by the Chapter)

This column assesses the success of your chapter's performance in each of the listed activities. Rate each activity on a scale of 4 (our chapter did an exceptional job on this activity) to 0 (poor job/we did not participate in this activity).

2. Once you have finished rating the activities in each segment, write the total in the box located beneath each segment. Divide the total for Column B by the total for Column A. The result will yield a value expressed as a percentage and will represent how well **you** feel your chapter is doing in each particular area.

YOUR OVERALL CMP CHAPTER SELF EVALUATION SCORE

Based on the hard work you have put into assessing your chapter's strengths and weaknesses, you should have a pretty good idea of how well your chapter is doing. You have already scored your chapter's performance on every activity in each segment. You are now ready to give your chapter an overall score.

3. You have previously calculated a subtotal for Column B (Performance) in each segment. Add these 10 subtotals and designate the total "x". Do the same for Column A (Importance) and designate the total "y". Divide "x" by "y" to arrive at your overall *Chapter Self Evaluation* score.

IF YOU SCORED:

100% - 80% Your chapter is in great shape - keep up the good work!

79% - 59% Your chapter is in good shape but could use a tune-up.

58% - 38% Your chapter is satisfactory. Please contact the HFTP office for some ideas on how to improve.

37% and lower Your chapter needs help. Please contact the HFTP office for assistance.

Now that you have completed the *Chapter Self Evaluation* you might wonder how to prioritize matters that require your special attention. We would suggest that particular attention be paid to activities which were scored high on "Importance to the Chapter" (Column A) but low on Performance by the Chapter (Column B). Once the areas that need improvement are identified, the members of your chapter should work together to determine how to plan for and act to improve. Please reference the HFTP *Chapter Orientation Manual*. Let us know how things are going.

Chapter Name: _____



CHAPTER MANAGEMENT PLAN

A: Importance to the Chapter

B: Performance of Chapter

1. Board of Director’s Leadership

- a) Ensure the chapter is in compliance with association and chapter standards and procedures.
 _____ **A** _____ **B**
- b) Conduct a board of director’s retreat/strategic planning meeting once a year.
 _____ **A** _____ **B**
- c) Ensure all directors fulfill their professional obligations on the board and to the local chapter.
 _____ **A** _____ **B**
- d) Establish an orientation program for new board members to ensure continuity and leadership succession practices.
 _____ **A** _____ **B**
- e) Board of directors and executive committee thoroughly understand HFTP’s and its chapter’s mission and objectives.
 _____ **A** _____ **B**
- f) Met requirements to receive full funding per Chapter Affiliation Agreement.
 _____ **A** _____ **B**
- g) Hold a minimum of 4 board meetings annually.
 _____ **A** _____ **B**

SUBTOTALS
B divided by A = _____ %

2. Chapter /National Identity

- a) Promote awareness of your chapter’s identity with the association.
 _____ **A** _____ **B**
- b) Comply with HFTP Bylaws.
 _____ **A** _____ **B**
- c) Have representation at Leadership Summit (formally Leadership Academy) face-to-face or online, the Annual Convention & Tradeshow and at chapter meetings.
 _____ **A** _____ **B**
- d) Ensure prompt return to the HFTP global office of any prospects, new member application, and other requested forms as outlined in the Chapter Operations Manual.
 _____ **A** _____ **B**
- e) Involve the chapter in awards competition.
 _____ **A** _____ **B**
- f) Encourage chapters to participate on international and local boards/committees.
 _____ **A** _____ **B**

SUBTOTALS
B divided by A = _____ %

Chapter Name: _____



CHAPTER MANAGEMENT PLAN

A: Importance to the Chapter

B: Performance of Chapter

3. Chapter Management

- a) Review the chapter bylaws annually.
_____ A _____ B
- b) Set and/or revise chapter goals each year.
_____ A _____ B
- c) Prepare and distribute a chapter master plan at the beginning of the year to your membership.
_____ A _____ B
- d) Have officers and chairpersons prepare written work plans.
_____ A _____ B
- e) Establish chapter committees and define their duties.
_____ A _____ B
- f) Provide timely follow-up and evaluation of each officer's work plan.
_____ A _____ B
- g) Establish and distribute an agenda prior to each meeting.
_____ A _____ B
- h) Distribute among executive committee members appropriate material pertaining to chapter affairs.
_____ A _____ B
- i) Educate and develop the skills of interested members who could be potential chapter leaders.
_____ A _____ B
- j) Prepare a plan for the transition of chapter leadership (i.e., files correspondence, records, etc.) to the proper successor at the end of the year.
_____ A _____ B
- k) Use proper procedures for chapter elections (i.e., verify eligibility to hold office).
_____ A _____ B
- l) Submit Chapter Quarterly reports.
_____ A _____ B
- m) Disseminate appropriate information received from HFTP to members on a timely basis.
_____ A _____ B

SUBTOTALS

B divided by A = _____%

Chapter Name: _____



CHAPTER MANAGEMENT PLAN

A: Importance to the Chapter

B: Performance of Chapter

4. Reporting and Recording

- a) Promptly submit all reports (i.e. any prospects, new member applications, and minutes) to HFTP.
 _____ **A** _____ **B**
- b) Have an organized filing system for rosters, membership records, minutes, etc.
 _____ **A** _____ **B**
- c) Maintain accurate and complete records and reports.
 _____ **A** _____ **B**
- d) Have a central storage location for all chapter records and forms, or maintain record storage locations if multiple locations.
 _____ **A** _____ **B**
- e) Ensure safekeeping of historical, legal and financial documents.
 _____ **A** _____ **B**
- f) Disseminate information to executive committee members, membership (i.e., chapter minutes, special information) in a timely, efficient manner.
 _____ **A** _____ **B**

SUBTOTALS
B divided by A = _____%

5. Financial Management

- a) Prepare and adopt an annual chapter budget.
 _____ **A** _____ **B**
- b) Comply with local/state tax regulations
 _____ **A** _____ **B**
- c) Conduct an annual financial audit and report to the chapter membership.
 _____ **A** _____ **B**
- d) Comply with requirements and submit all appropriate reports to the HFTP global office for IRS purposes.
 _____ **A** _____ **B**
- e) Maintain a good credit record for prompt payment of accounts payable.
 _____ **A** _____ **B**
- f) Immediately submit any new memberships received through chapter events to the HFTP global office to enroll and begin their benefits.
 _____ **A** _____ **B**

SUBTOTALS
B divided by A = _____%

Chapter Name: _____



CHAPTER MANAGEMENT PLAN

A: Importance to the Chapter

B: Performance of Chapter

6. Membership Recruitment/Retention

- A.) Membership committee and current members are knowledgeable about HFTP membership structure, categories, pricing levels and key member benefits.
 _____ **A** _____ **B**

- B.) Meet or exceed the chapter’s annual membership recruitment goal.
 _____ **A** _____ **B**

- C.) Maintain and achieve at least 85 percent retention rate.
 _____ **A** _____ **B**

- D.) Ensure recruitment is supported through year-round, planned chapter recruitment and retention programs.
 _____ **A** _____ **B**

- E.) Conduct a new member chapter orientation program.
 _____ **A** _____ **B**

- F.) Encourage new member involvement on committees and programs.
 _____ **A** _____ **B**

- G.) Provide prompt, courteous response and follow-up to all prospective HFTP member inquiries.
 _____ **A** _____ **B**

- H.) Incorporate member recognition programs, such as a member spotlight.
 _____ **A** _____ **B**

- I.) Promote company involvement through CEO or cooperative programs with the employer’s association.
 _____ **A** _____ **B**

- J.) Maintain prospect database including periodic updates from the HFTP database.
 _____ **A** _____ **B**

- K.) Establish a “welcome” committee and/or buddy system to support new members at functions.
 _____ **A** _____ **B**

- L.) Use monthly reports for contacting and welcoming new members and encouraging lapsed members to get involved.
 _____ **A** _____ **B**

SUBTOTALS
B divided by A = _____%



CHAPTER MANAGEMENT PLAN

A: Importance to the Chapter

B: Performance of Chapter

7. Education

- A.) Conduct a minimum of four meetings per year, two of four should be educational.
 _____ **A** _____ **B**

- B.) Provide variety and depth in educational programs.
 _____ **A** _____ **B**

- C.) Have average meeting attendance above 25 percent of CURRENT MEMBERSHIP.
 _____ **A** _____ **B**

- D.) Present one educational activity with an allied association annually.
 _____ **A** _____ **B**

- E.) Conduct an annual needs assessment survey of the members and prospective members regarding the chapter’s educational program.
 _____ **A** _____ **B**

- F.) Contact local university and encourage faculty and student participation.
 _____ **A** _____ **B**

SUBTOTALS
B divided by A = _____ %

8. Communication /Public Relations/Community Involvement

- a) Promote positive communication and chapter involvement with leaders in the community/region and with allied associations.
 _____ **A** _____ **B**

- b) Publicize and promote projects and events utilizing local/regional media, chapter newsletter, website and/or other effective means.
 _____ **A** _____ **B**

- c) Have ongoing correspondence programs with community/regional groups.
 _____ **A** _____ **B**

- d) Conduct at least one community service project each year.
 _____ **A** _____ **B**

- e) Have representation on workshop panels with allied associations, business groups, etc.
 _____ **A** _____ **B**

- f) Develop a “speaker’s bureau” in which colleges /universities can contact members to speak about the industry where applicable.
 _____ **A** _____ **B**

- g) Publish a chapter newsletter a minimum of four times per year.
 _____ **A** _____ **B**

Chapter Name: _____

CHAPTER MANAGEMENT PLAN

A: Importance to the Chapter

B: Performance of Chapter

8. Communication /Public Relations/Community Involvement (continued)

h) Develop and/or continue to expand chapter webpage for providing information to members.

_____ **A** _____ **B**

i) Establish a local scholarship.

_____ **A** _____ **B**

j) Encourage student members to attend senior chapter meetings where applicable within the chapter.

_____ **A** _____ **B**

SUBTOTALS

B divided by A = _____ %

9. Social Activities

a) Conduct entertainment/social functions to build camaraderie and fellowship among members.

_____ **A** _____ **B**

b) Conduct a social function to include spouse and/or children.

_____ **A** _____ **B**

c) Hold an annual social gathering to recognize outstanding members and new members.

_____ **A** _____ **B**

SUBTOTALS

B divided by A = _____ %

10. Member Responsibilities

a) Participate in chapter activities and/or volunteer to serve on chapter committees.

_____ **A** _____ **B**

b) Encourage new members to experience the organization.

_____ **A** _____ **B**

SUBTOTALS

B divided by A = _____ %

OVERALL CHAPTER SCORE

(Please refer to the instruction page to compute your overall *CMP Self Evaluation*)

X _____ divided by Y _____ = _____ %

("x" equals the addition of all 10 subtotals of column A, "y" equals the addition of all the subtotals of column B)

Final Note: This IS a draft document. You are encouraged to add, subtract, or modify any of the areas in this self-evaluation. Please discuss this with your chapter. Send any comments to the chapter relations manager at the HFTP global office.

Chapter Name: _____

Submit Form To:
HFTP Chapter Relations Coordinator
11709 Boulder Lane, Ste 110 | Austin, TX 78726-1832 USA
Chapteradmin@hftp.org | Fax: +1 (512) 249-1533
Questions? Contact +1 (512) 220-4161