2015 - 2016 Chapter Operations Management Tool

3. Charter Requirements - SOG 8.10 - Required Reports

1. **SOG 8.10** Upload your Annual Chapter Leadership Report (Due May 31, 2016).

Tip - Check to make sure this form is filled out correctly, you've listed all required officers, you've reviewed the number of delegates you are allowed, and that you've reported on your sections if you have any sections. This form was emailed directly to the officers. If you need another copy contact chapterservices@asse.org

   Chapter_Chesapeake_2016-03-10mw.xlsx

   Comments: complete

2. **SOG 8.10** Upload your Chapter’s Annual Financial Report (Due May 31, 2016).

Tip - The Current report form is in Officer Central on the Treasurer's Page. You'll also find useful information to complete the report there.


   Comments: complete

3. Please enter your total revenue and total expense from your financial report below:

   $ Total Revenue : 25711.19
   $ Total Expense (place a negative before the number) : -23925.57
   Total : 1785.62

4. **SOG 8.10** Upload your Chapter’s Financial Checklist (Due May 31, 2016).

   Tip - The Current report form is in Officer Central on the Treasurer's Page. You'll also find useful information to complete the report there.


   Comments: complete

5. **SOG 8.10** Upload your 2016-2017 Chapter Operational Plan (Due August 15, 2016)

   Tip - The current Operational Report form and a planning guide is in Officer Central in the 101 Area.

   Comments:
6. **Chapter Meeting Tracker.**

Four Technical Meetings are required to maintain your Chapter Charter. Fill in the details of your chapter meetings below. We recommend filling this in after every meeting.

<table>
<thead>
<tr>
<th>Meeting</th>
<th>Month</th>
<th># of Attendees</th>
<th>Technical</th>
<th>Type of Meeting</th>
<th>CEU's Offered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meeting One</td>
<td>January</td>
<td>25</td>
<td>Yes</td>
<td>Face-to-Face</td>
<td>No</td>
</tr>
<tr>
<td>Meeting Two</td>
<td>February</td>
<td>0</td>
<td>Yes</td>
<td>Virtual</td>
<td>No</td>
</tr>
<tr>
<td>Meeting Three</td>
<td>March</td>
<td>14</td>
<td>Yes</td>
<td>Tour/Special Event</td>
<td>No</td>
</tr>
<tr>
<td>Meeting Four</td>
<td>April</td>
<td>145</td>
<td>Yes</td>
<td>PDC</td>
<td>Yes</td>
</tr>
<tr>
<td>Meeting Five</td>
<td>May</td>
<td>22</td>
<td>No</td>
<td>Face-to-Face</td>
<td>No</td>
</tr>
<tr>
<td>Meeting Six</td>
<td>June</td>
<td>10</td>
<td>No</td>
<td>Face-to-Face</td>
<td>No</td>
</tr>
<tr>
<td>Meeting Seven</td>
<td>September</td>
<td>25</td>
<td>Yes</td>
<td>Face-to-Face</td>
<td>No</td>
</tr>
<tr>
<td>Meeting Eight</td>
<td>October</td>
<td>50</td>
<td>Yes</td>
<td>Tour/Special Event</td>
<td>No</td>
</tr>
<tr>
<td>Meeting Nine</td>
<td>October</td>
<td>18</td>
<td>No</td>
<td>Social Outing</td>
<td>No</td>
</tr>
<tr>
<td>Meeting Ten</td>
<td>November</td>
<td>13</td>
<td>No</td>
<td>Face-to-Face</td>
<td>No</td>
</tr>
<tr>
<td>Meeting Eleven</td>
<td>December</td>
<td>28</td>
<td>No</td>
<td>Face-to-Face</td>
<td>No</td>
</tr>
<tr>
<td>Meeting Twelve</td>
<td>December</td>
<td>28</td>
<td>No</td>
<td>Social Outing</td>
<td>No</td>
</tr>
</tbody>
</table>

Comments: CEUs Vs, Contact hours??

7. Upload and Save your meeting attendee lists (you can upload up to ten lists).

- September 2015 Meeting Registration.xlsx
- October 2015 Meeting Registration.xlsx
- November 2015 Meeting Registration.xlsx
- December 2015 Meeting Registration.xlsx
- January 2016 Meeting Registration.xlsx
- February 2016 Meeting Registration.xlsx
- March 2016 Meeting Registration.xlsx
- June 2015 Meeting Registration.xlsx
- May 2016 Meeting.xlsx

8. How many meeting attendee lists did you upload in the previous question?

Tip - By uploading meeting attendee lists you earn additional points.

7 or more

9. Number of required Chapter reports submitted to the RVP and/or AD for each AOC and/or ROC meeting:

2 or more

10. **Chapter Meeting Tracker.**

Number of AOC and/or ROC meetings attended by the Chapter President or proxy.

You are required to attend at least one a year.

2 or more
11. **SOG 8.10** Provide the names of your Nominations and Elections Committee.

Tip - Please visit Officer Central for more N&E resources. Per the model bylaws, the committee should be a minimum of three people and a maximum of five. Current model bylaws state the committee should be established by December 1.

Committee Chair: Patrick Wheltle  
Committee Member: Peter Holzberg

12. **SOG 8.10** Did your chapter publish a slate of candidates in the time frame required by your bylaws?

Yes

**Comments:** We published the slate, but did not conclude the election timely. In an attempt to not to appear foolish, asking members to vote when all candidates were unopposed, election process will not be completed until May, 2016

13. **SOG 8.10** Required Chapter Website Updates.

You are required to review your entire website every 90 days (quarterly) to ensure it is current. Please check all the pages. Important pages to review are the main page, calendar page, new pages, officer page.

- Reviewed between July-September  
- Reviewed between October-December  
- Reviewed between January-March  
- Reviewed between April-June

5. **Chapter Engagement, Membership, & Communications**

14. How did your Chapter take steps to create a personalized and welcoming environment to your members?

- Welcome new members with an e-mail or phone call  
- Personally greeting members at meetings  
- Sending personalized e-mail invitations to meetings  
- Offer a new member orientation

15. How did your Chapter recognize members for their service to ASSE and for their activities and achievements?

- Published in our Newsletter or website  
- Recognized at Meeting  
- Other: Awarded chapter spy  
- Awarded long service recognition awards at our Chapter Meetings

16. How did your Chapter recruit new ASSE and Chapter Members?

- Exhibited or attended local Safety events to promote the Chapter & ASSE  
- Other: participated in aerial lift stand down day  
- Other: participated in red cross smoke detector day  
- Other: sponsored 4h engineerin contestants  
- Leveraged the Society's annual Member Get a Member Campaign  
- Contacted local businesses in the area

17. How did your Chapter provide employment information to your members?

- Posted local employment opportunities in our newsletter/website  
- Promoted local employment opportunities at Chapter meetings/events  
- Other: post to facebook & LinkedIn page  
- Referred local employers to post jobs on the ASSE Job Board  
- Referred local chapter members to post resumes on the ASSE Job Board
18. How did your Chapter determine member expectations and utilize this assessment?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>We conducted a member survey (separate from the Society Chapter Experience Survey)</td>
<td>X</td>
</tr>
<tr>
<td>We conducted a post-meeting evaluation after each meeting</td>
<td>X</td>
</tr>
<tr>
<td>We distributed the results of all surveys to the Chapter Officer Team</td>
<td>X</td>
</tr>
<tr>
<td>We shared results with the Chapter Members</td>
<td>X</td>
</tr>
<tr>
<td>We used data to make changes to future meetings and/or the way we communicate with our members</td>
<td>X</td>
</tr>
</tbody>
</table>

19. Please describe your Chapter’s efforts and practices in communicating to Chapter Members, with Chapter Newsletters.

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our Chapter distributed our newsletter on a consistent schedule (i.e. monthly, quarterly)</td>
<td>X</td>
</tr>
<tr>
<td>Our Chapter distributed our newsletter more than four times a year</td>
<td>X</td>
</tr>
<tr>
<td>Our Chapter has designated volunteer(s) responsible for developing and distributing the newsletter(s)</td>
<td>X</td>
</tr>
<tr>
<td>Our Newsletter(s) contain a mix of Chapter news, Society news, and SH&amp;E content</td>
<td>X</td>
</tr>
<tr>
<td>To earn Bonus Points check yes &amp; upload an example of your Newsletter below.</td>
<td>X</td>
</tr>
</tbody>
</table>

Upload a copy of one of your newsletters.

- [December-2015-Chesapeake-ASSE-Newsletter.pdf](December-2015-Chesapeake-ASSE-Newsletter.pdf)

20. Please describe your Chapter practices & procedures in terms of your Chapter Website.

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does your officer page have officer photos and their contact info?</td>
<td>X</td>
</tr>
<tr>
<td>Did your Chapter maintain it's website with monthly content updates?</td>
<td>X</td>
</tr>
<tr>
<td>Does your Chapter have a designated volunteer(s), responsible for ensuring your website it up to date?</td>
<td>X</td>
</tr>
</tbody>
</table>

21. Please indicate other ways your Chapter has communicated with it’s members

- Use of Social Media (Chapter Facebook Page, Twitter, Linked In)
- Chapter Meeting Notices distributed 3 - 4 weeks prior to the meeting date
- Follow-up meeting messages, thanking for attending & providing any meeting resources
- Other: Printed flyers
- Other: mailchimp reminders
- Other: verbal

22. Does your Chapter have Sections or Student Sections?

- No

7. Community Outreach
23. How does your Chapter communicate or promote Safety in your community?

Support a student scholarship or the ASSE Foundation
Involvement in local organizations (i.e. 4H)
Partner with other safety organizations or local businesses
Other: encourage members to volunteer in safety promotions
Other: participate in red cross smoke alarm dist
Other: participated in stand down for fall prot
Other: provide safety inspection for local fair
Participate in Career Day(s)

24. Does your Chapter support NAOSH week?

Yes

If so, describe in detail what your Chapter did to support this event. Examples may include, but are not limited to, promoting NAOSH week on your Chapter website, holding a small business workshop, creating a proclamation, hosting a safety open house, etc.

This year we solidified our commitment by making financial donations towards two major scholarship funds. These donations will support future leaders and safety educators to allow continuance of our motivation to reduce occupational injuries across the America’s.

9. Professional Development

25. Please answer the following questions in regards to your Chapter Meeting Planning & Operations.

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does your Chapter collaborate across Society to source speakers? (i.e. Practice Specialties, Other Chapters, etc.)</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Does your Chapter offer virtual meeting options?</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Does your Chapter offer CEU’s at your event(s)?</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Does your Chapter have a sponsorship program?</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Does your Chapter offer Certification study groups?</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

11. Leadership & Training

26. Indicate the training opportunities your Chapter Leaders have participated in.

  Leadership Conference
  Online Officer Training
  Chapter Training at ROC Meetings
  Individual training or transition meetings
  Other: seminar fest
  Other: one on one with RVP
  Other: working with membership committee
  Other: participating with chapter ops

27. Has your Chapter developed a succession plan for the training and development of incoming Chapter Leadership and does your Chapter use a duty checklist for all incoming Chapter Leaders?

Yes

12. Your Total Points

4,975