



## Chapter Assessment Report or CAR

HSMIA is pleased to present this new chapter operation resource.

This tool has been developed to help chapter presidents and their boards to focus on what is most important in managing their chapter. (Remember the 80/20 rule. 80% of your outcomes are the result of 20% of your efforts.)

HSMIA realizes and values the contributions of our volunteer chapter leadership and has developed this tool to help you manage the chapter. It also helps the chapter president to delegate and direct the chapter board and committees you work with.

This Chapter Assessment Report should link directly to your strategic plan for 2006. Please incorporate the specifics of CAR into your planning process.

Although the measurements are not weighted by chapter size, we will designate sizes as:

Small 25-75

Medium 76-175

Large 176+ members

CAR will become effective in January 2006. In late December 2006 or early January 2007, the chapter board will be asked to complete the "points achieved" portion of the assessment and send to the Chapter Relations Office. The chapter will then be identified in one of the following "levels" of operation.

Platinum Level    Minimum of 900 Points  
Gold Level        Minimum of 750 Points  
Silver Level       Minimum of 650 Points  
Bronze Level      Minimum of 600 Points  
Honorable Mention - Minimum of 550 Points

Each level will represent an award and recognition program. The program is undetermined at this time.

Send comments, suggestions and recommendations to :

Margie Sheffer at [mshsmai@aol.com](mailto:mshsmai@aol.com) or call toll free at 1-877-643-3511

# Chapter Assessment Report (CAR)

## 1. *Effective Chapter Management*

	Category/Description	Points Possible	Points Awarded
A	The chapter has acquired a Tax ID number and reported it to the Chapter Relations Office.	25	
B	The chapter has, or secured, tax-exempt status from the IRS (or comparable tax status if outside the U.S.)	5	
C	The chapter has applied for, received or retained incorporation status.	5	
D	The chapter sends financial reports to the Chapter Relations Office at least quarterly.	10	
E	The chapter performed (on its own or through a third party) an annual audit or review of its finances.	10	
F	The chapter has two signatures on its checking account.	15	
G	Chapter by-laws are current and have been approved by the Chapter Relations Office	15	
H	The chapter has maintained chapter board membership renewals on-time (no lapsed board memberships)	25	
I	The chapter conducts its annual chapter board nomination, voting and installation procedures as outlined in the Chapter Operation Guidelines.	15	
J	The chapter is in compliance with all terms of the Chapter Charter. i.e.; frequency of educational meetings, membership communications, customer event, recognition program, logo usage, board meeting minutes and financials to Chapter Relations Office, etc.	30	
K	The chapter is represented by the president or president-elect and managing director (if applicable) at the annual Leadership Forum	25	
L	The chapter president attends the web based Presidents Orientation conducted in January or February each year	20	
M	The chapter president completes and submits the annual Past Presidents Survey by requested due date in December	30	
N	The chapter president attends at least 50% of the monthly presidents conference calls	20	
O	The managing director (if applicable) attends at least 50% of the monthly MD's conference calls	20	
P	The membership chair attends at least 50% of the monthly membership conference calls	20	
Q	75% or more of the new chapter board attends the annual Fall Chapter Board Planning Session	10	
<b>TOTAL POINTS:</b>		<b>300</b>	<b>0</b>

## 2. Education

	Category/Description	Points Possible	Points Awarded
A	The chapter has educational program planning complete and marketed. 3 months out =30 pts or 6 months out =40 pts or 9 months out =60 pts or a full year for 80 pts maximum.	80	
B	The chapter survey's its membership for educational topic requests or preferences and plans accordingly	20	
C	The chapter receives at least a 75% evaluation rating for chapter educational events or based on ratings a "very good"	20	
D	The chapter posted and updated all chapter events on the HSMAI website.	40	
E	The chapter conducts at least one awards and recognition program for members, community or industry leaders	20	
F	The chapter conducts at least one educational program that includes members customers or specific market segments	20	
<b>TOTAL POINTS:</b>		<b>200</b>	

### 3. Communications

	Category/Description	Points Possible	Points Awarded
A	A regularly scheduled newsletter (or other communique) was sent to all chapter members, the Chapter Relations Office and headquarters	30	
B	HSMAI's Calendar of Events is published in your communication to members.	15	
C	HSMAI ads are published in your member communication when provided	15	
D	The chapter utilizes staff or America's board members to speak to members to increase awareness of member benefits.	20	
E	The chapter created awareness of resources found on the <a href="http://www.hsmai.org">www.hsmai.org</a> web site to its members	30	
F	The chapter created awareness and created interest among its members to sign up for special interest groups (SIG's)	25	
G	The chapter created awareness among its members of the eConnect resource	25	
H	Chapter documents all board meeting minutes and sends a copy to the Chapter Relations Office	15	
I	The chapter has or is developing a chapter web site.	15	
J	The chapter publishes the chapter mission/vision statement on web site and in written communications.	10	
<b>TOTAL POINTS:</b>		<b>200</b>	

#### 4. Membership Recruitment & Retention

	Category/Description	Points Possible	Points Awarded
A	The chapter increased its annual membership by 10%	25	
B	The chapter maintained a 65% retention rate	25	
C	The chapter has a program for "member care"	20	
D	The chapter has a program for membership growth	25	
E	The chapter has a program for non-member attendance at chapter events.	15	
F	The chapter has a program for contacting pending renewal memberships	25	
G	The chapter has an orientation program for new members	15	
H	The chapter has experienced an over-all increase in attendance	10	
I	The chapter secures evaluations at all chapter events	15	
J	The chapter developed student members/clubs	10	
K	The chapter has a prospect list and keeps it current	15	
<b>TOTAL POINTS:</b>		<b>200</b>	<b>0</b>

## 5 *Miscellaneous Chapter Activities*

Item	Category/Description	Points Possible	Points Awarded
A	The chapter submits entries for the Best of the Best Program. 5 points per category, maximum of 45 points for all nine categories	45	
B	The chapter makes a donation to the HSMAI Foundation	20	
C	The chapter adopts a charity or other community program	20	
D	The chapter has established a partnership/sponsorship program	15	
<b>TOTAL POINTS:</b>		<b>100</b>	<b>0</b>

## *Overall Score Summary*

Item	Category/Description	Points Possible	Points Awarded
1	Effective Chapter Management	300	0
2	Education	200	0
3	Communications	200	0
4	Membership Recruitment and Retention	200	0
5	Miscellaneous Chapter Activities	100	0
<b>TOTAL POINTS:</b>		<b>1000</b>	<b>0</b>