2020 SHRM Regional Council Business Meeting
State Council Membership Directors
Introductions:

With your table mates please share; your name, your state, and the number of SHRM members in your state
State Council Membership Directors
Session Agenda – Friday 2/21/20 9:00am – 4:30pm

• Why Data is Important
• How SHRM Uses Data for Membership Acquisition and Retention – An Experts View
• Your Data. What Does it Mean, How Do You Read a Membership Report
• Break
• Best Practices from Your Peers, Using Data - Real Life Stories from the Field
• Let’s Look at Your Data – Workshop
• Lunch
• Ideate – Membership Acquisition Ideas to Get You Started, Real Life Stories from the Field
• Let’s Get to Work, Development of Your 2020 State Membership Goals and Action Plans
State Council Membership Directors

Session Agenda – Saturday 2/22/20 8:45am – 9:45pm

• Final tweaks to your 2020 State Membership Goals and Action Plans

• Sharing Your Hard Work with Others
A Story about Disneyland, High School and Trashcans

aka…a Story About Data
The Importance of Data – And How SHRM Uses It

Presented by:

Elizabeth Custer
Manager, Membership
Retention Marketing
What exactly are we talking about when we say, “data?”

For marketing, data is any information that gives us insight into:
- Our audience
- Our product/service
- Our campaigns
Let’s start with audience.

Elizabeth Custer
Manager, Member Retention Marketing
SHRM
1800 Duke Street, Alexandria, VA
Grad Date/Year Entered Workforce/Birth Date: ___
What do you know about me? What insight can you gain?

Marketing Professional → Area of Expertise
People Manager → Area of Interest
SHRM → Industry/Organization Type
Virginia MA, South Shore → Location, Local Interests
Age/Grad Date → Time in Workforce
Millennial → Channel or Delivery Preferences
Event Attended: ___ → Area of Interest/Development Area
Identify key audience segments.

Audience: all HR Professionals in North Carolina

Area of Interest
- Comp & Ben
- Org Development
- Strategic Planning
- Talent
- Compliance
- D&I

Certified
- Not Certified
- SHRM-CP
- SHRM-SCP

Delivery Preferences
- Email
- Direct Mail
- Phone

*Example Data Only.
Use your audience data to inform your product positioning.

What do you offer?
- Local experts
- Networking
- Local events – Range of topics
- PDCs
- Local legislative updates, compliance resources
SHRM Educational Programs

We're Coming to Portland!

Let's make a trade. Next month you show us yours and we'll show you ours!

October 2nd through the 4th we'll be in Portland and we want to leave all the things that makes it "multifaceted" in exchange, join us for one of the two development programs we're hosting, and receive the knowledge you need to help improve others.

Portland Educational Opportunities Include:

People Analytics: Taking Data-Driven Action**
Stop using your gut to make talent decisions. Learn to use your data. October 2-4 | Learn More » Register!

SHRM-CP and SHRM-SCP Certification Preparation* (SHRM-CP only)
Become recognized as an HR leader. Take the first step in earning your SHRM Certification. October 2-4 | Learn More » Register!

93% of employees would stay with a company longer if they invested in their career. Lead by example. Invest in yourself this Fall.

Already have plans on the dates we're in town? No problem—these programs, along with 50+ others, are also available online.

Strive to be your best you, to help others be great too.

REGISTER TODAY!

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YOUR TICKET TO FREE PDCs

With your SHRM-SCP, you stand out as a recognized expert in the HR field. When your membership expires, you'll miss out on access to critical tools to help you further your career and overcome your HR challenges.

Plus, you earn 3 PDCs a year—a total of 9 PDCs per recertification cycle—just for being a SHRM member.

As an extra bonus, use code CERT16 by 11/16 and get $15 off your membership.

SHRM Expiration Date: February 29, 2020

RENEW TODAY

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Your SHRM Membership Expires 2-29-2020

RENEW TODAY

SHRM MEMBERSHIP and CHAPTER MEMBERSHIP
Fit Together Perfectly.

Overcome your challenges by combining the essential HR tools offered by SHRM national membership with local networking and programming.

Chapter Membership

Access local educational opportunities and build your network of professionals in your community with SHRM chapters. What combined with your SHRM membership, being a member of a chapter will help you further your career.

FIND LOCAL CHAPTER

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2019 Iowa SHRM State Conference

October 9-11, 2019 | Des Moines, IA
Hy-Vee Convention Center

Get your HR game on! Join us at the 2019 Iowa SHRM State Conference at Hy-Vee Hall in Des Moines. HR professionals from across the Midwest will be gathering to sharpen their HR skills, network and recharge their HR batteries. SHRM CEO, Johnny C. Taylor, Jr., will help us "get our game on" as our special guest and keynote speaker. Register today!

Learn More >>

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So you think you’re ready to run your campaign…

How will you know if it worked?
Define success and identify your key performance indicator.

<table>
<thead>
<tr>
<th>Goal</th>
<th>KPI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grow Membership</td>
<td>New Memberships Purchased (Conversions)</td>
</tr>
<tr>
<td>Member Engagement</td>
<td>Email clicks; Web page visits; Time on website</td>
</tr>
<tr>
<td>Grow Event Sign Ups</td>
<td>Event Registrations</td>
</tr>
<tr>
<td>Member Retention</td>
<td>Memberships Renewed (Conversions)</td>
</tr>
</tbody>
</table>
Performance Context

Goal: New and renewing membership sales
KPI: Conversions

How successful was this email?
Generated: $500  Conversions: 2
Generated: $5,000  Conversions: 24
Generated: $50,000  Conversions 240
Performance Context

What does that tell us? Nothing… yet.

- How large was the audience?
- How much did you spend?
- Timing/urgency
Your instincts might be good… but you still might be wrong. Don’t just guess, test!

**Subject Line A:** We’re serious—it’s your last chance.

**Subject Line B:** Don’t leave $25 on the table.

As most of us prepare to set our clocks back one hour this weekend, it’s a good time to also check in on our timekeeping practices. Let SHRM help answer your toughest questions regarding nonexempt employees and Daylight Saving Time.

This weekend only, while your clocks fall back—so do your membership dues! Take $25 off** your professional membership renewal when you use code FALLBACK25 by Monday.

Don’t miss out on our biggest deal of the year—use this email for great savings and as a reminder to set your clocks back this coming weekend!

- Does Double Pay Apply for 1:00 a.m. to 2:00 a.m.? [READ MORE]
- Employers’ Overtime Obligations [READ MORE]
- States that Deviate from the Daylight Saving Standard [READ MORE]

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Tracking Tools

Your non-outlook email platform:
- Number delivered, Opens, Clicks

Google Analytics (free basic):
- Web data: Web visits, time on page
- Build and track links for emails, print ads, flyers, direct mail
- Conversions

Event Registration Platform
- Form fill outs
1. Know your audience.
2. Tie your audience into your product/service.
3. Track, analyze and learn from your efforts.
Questions?

Elizabeth Custer

Elizabeth.Custer@shrm.org
Membership Data for Chapters and State Councils

What does it all mean…

Presented by:

Mark Davila
Director, Strategic Affiliate Partnerships

Tiffany Brown
Member Engagement Associate
## Quarterly Membership Report – Line by Line Review

### Maryland

**SHRM Quarterly Membership Report 2019**

### SHRM In-Chapter Membership

| Chapter Number | Chapter Name | Dec-17 | Dec-18 | Mar-19 | Jun-19 | Sep-19 | Dec-19 | Chapter Size | Total # Mbrs in Chapter | # of Multi Members | # LMOs in Chapter | 2019 Audit Month | Chapter Affiliation Stage | # of SHRM Certified SHRM members primarily coded to chapter | Enter # of Chapter Members That Renewed [Actual] | Enter # of Chapter Members Eligible to Renew | Chapter Retention Rate |
|----------------|--------------|--------|--------|--------|--------|--------|--------|-------------|----------------------|-----------------|---------------|----------------|----------------|--------------------------|-----------------------------------------------|-----------------------------------------------|-----------------------------------------------|-------------------|
| 0116           | Chesapeake HR Assn | 975    | 614    | 617    | 616    | 624    | -10    | 125         | 30                   | 105             | 30            | 103            | Dec-17         | 67.31%                  | 315                    | 315                  | 315                | 67.31%            |
| 0204           | Cumberland Valley Chapter | 67     | 72     | 69     | 70     | 72     | -7     | 122         | 4                    | 48              | 60            | 66.66%         | Dec-18         | 89.71%                  | 55                    | 55                   | 55                | 89.71%            |
| 0231           | Frederick County SHRM | 105    | 86     | 97     | 103    | 113    | -18    | 140         | 7                    | 20              | 53            | 85.71%         | Mar-19         | 71.48%                  | 94                    | 94                   | 94                | 71.48%            |
| 0346           | Anne Arundel SHRM | 97      | 112    | 128    | 112    | 72     | -14    | 168         | 25                   | 173             | 48            | 85.71%         | Jun-19         | 78.05%                  | 63                    | 63                   | 63                | 78.05%            |
| 0367           | Howard County HR Society | 85     | 103    | 112    | 124    | 23     | 3       | 181         | 19                   | 38              | 33            | 81.82%         | Jul-19         | 79.01%                  | 61                    | 61                   | 61                | 79.01%            |
| 03641 Eastern Shore SHRM | 50     | 52     | 54     | 56     | 57     | 3      | 58      | 52          | 37              | 37            | 63.86%         | Sep-19         | 50.00%                  | 33                    | 33                   | 33                | 50.00%            |
| 03271 HR Society of Prince George's City | 52     | 39     | 47     | 53     | 67     | -18    | 67        | 0          | 0                | 0              | 100.00%        | Nov-19        | 64.53%                  | 55                    | 55                   | 55                | 64.53%            |
| 03714 Grand County SHRM | 85     | 77     | 104    | 106    | 114    | 37      | 146       | 6          | 68              | 68            | 64.53%         | Dec-19        | 76.92%                  | 50                    | 50                   | 50                | 76.92%            |
| Grand Total    |              | 1,337  | 1,403  | 1,506  | 1,552  | 1,486  | 85       | 2,353       | 98                   | 708             | 85            | 67.32%         |               |                         | 315                  | 315                   | 315               | 67.32%            |

* Chapters must be in good standing and meet their current minimum chapter affiliation standards in order to be eligible for Chapter Financial Support Payments (CFSP).
* The SHRM In-Chapter section represents SHRM members in chapters only, primary designation. NOT total chapter membership.
* Primary designation denotes chapter members, belonging to more than one chapter that designate the particular chapter as primary. SHRM members can only designate one primary chapter.
* CFSP is based on the number of professional/general/associate SHRM members primarily coded to the chapter at the end of the payment period.
* Total number of members in chapter is based on the last chapter audit.
Simple Annual Retention Calculation

Example

- Ending Balance on 12/31/2018 – 1,300
- Ending Balance on 12/31/2019 – 1,400
- Acquisition 2019 – 280 new members
- Renewals 2019 – 820 renewing members

Annual Retention rate can be calculated this way:

\[
\frac{\text{Ending Balance 2019} - \text{Acquisition 2019}}{\text{Ending Balance 2018}} = \frac{1400 - 280}{1300} = \frac{1120}{1300} = 86\%
\]
## Simple Annual Retention Calculation

### Sample Annual Retention Rate Calculations

<table>
<thead>
<tr>
<th>Example 1</th>
<th>Ending Balance</th>
<th>Acquisition</th>
<th>Growth</th>
<th>Non-renewing</th>
<th>Renewing</th>
<th>Retention</th>
<th>Churn</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>1,000</td>
<td>175</td>
<td>100</td>
<td>75</td>
<td>925</td>
<td>93%</td>
<td>8%</td>
</tr>
<tr>
<td>2018</td>
<td>1,100</td>
<td>100</td>
<td>75</td>
<td>925</td>
<td>93%</td>
<td>8%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Example 2</th>
<th>Ending Balance</th>
<th>Acquisition</th>
<th>Growth</th>
<th>Non-renewing</th>
<th>Renewing</th>
<th>Retention</th>
<th>Churn</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>1,000</td>
<td>225</td>
<td>100</td>
<td>125</td>
<td>875</td>
<td>88%</td>
<td>13%</td>
</tr>
<tr>
<td>2018</td>
<td>1,100</td>
<td>125</td>
<td>875</td>
<td>88%</td>
<td>13%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Example 2</th>
<th>Ending Balance</th>
<th>Acquisition</th>
<th>Growth</th>
<th>Non-renewing</th>
<th>Renewing</th>
<th>Retention</th>
<th>Churn</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>1,000</td>
<td>350</td>
<td>100</td>
<td>250</td>
<td>750</td>
<td>75%</td>
<td>25%</td>
</tr>
<tr>
<td>2018</td>
<td>1,100</td>
<td>250</td>
<td>750</td>
<td>75%</td>
<td>25%</td>
<td></td>
<td></td>
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</tbody>
</table>
Best Practices from Your Peers *Using Data*

Presented by:

Debbie Fisher, OH State Council Membership Director

Chad Sorenson, FL State Council Director Elect

Deron Lehman, VA Member of the Board
Workshop:

Pull up your last Membership Report
Review it – Analyze it

Also look at publicly available information (i.e. Bureau of Labor Statistics) on the internet for insights into your state

What are your early thoughts on where to focus
Some possible questions to answer:

- What are your pools for recruitment, and where are they located?
- How Many HR in your state? Clustered where?
- How many HR Students and where are they located?
- What groups, universities and city clusters have the largest population of HR people and students?
- How does that compare to your state/chapter membership?
- Which chapters have the largest capability, which chapters don’t have the capability but have high potential?
- How does that help you determine an action plan?
LUNCH
Best Practices from Your Peers

Ideas on retention and acquisition

Presented by:

Jason Sutheimer, ND State Council Director

Linda Dausend, AZ State Council Director
Membership Update

MEMBERSHIP PLANNING PROCESS
February 21, 2020

Linda Dausend, CPLP
State Director-Elect
Arizona State Council
DETERMINING GOALS

GOAL SETTING PROCESS

- Gather
  - SHRM Results
  - Chapter Results
  - Member Survey
  - Other AAR

- Analyze
  - SHRM Data
  - Chapter Analysis
  - Determine Drives and Liabilities

- Create
  - Roll up Chapter Goals
  - Review Current Goals
  - Establish/Update Initial Goals
  - Strategize with Chapters and Council
DETERMINING GOALS

GOAL SETTING PROCESS

Gather

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  • Chapter Results
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• Roll up Chapter Goals
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Create
Gathering Our Data

LOOKING BACK
## ARIZONA SHRM Membership

<table>
<thead>
<tr>
<th></th>
<th>Dec 19</th>
<th>Dec 18</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>SHRM Members in Chapters</td>
<td>916</td>
<td>792</td>
<td>15.7%</td>
</tr>
<tr>
<td>At-large members</td>
<td>4,188</td>
<td>4,145</td>
<td>+ 1.0%</td>
</tr>
<tr>
<td>Total Statewide SHRM members</td>
<td>5,104</td>
<td>4,950</td>
<td>+ 3.1%</td>
</tr>
</tbody>
</table>

Dec 19 data acquired from SHRM
## ARIZONA SHRM Membership

<table>
<thead>
<tr>
<th>Affiliation</th>
<th>Sept 19</th>
<th>Dec 18</th>
<th>% change</th>
<th>Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>SHRM Of Greater Phoenix</td>
<td>501</td>
<td>412</td>
<td>+21.6%</td>
<td>100.00%</td>
</tr>
<tr>
<td>SHRM of Greater Tucson</td>
<td>240</td>
<td>228</td>
<td>+5.3%</td>
<td>53.42%</td>
</tr>
<tr>
<td>Central Arizona HR Mgmt. Assn.</td>
<td>11</td>
<td>7</td>
<td>+57.1%</td>
<td>57.89%</td>
</tr>
<tr>
<td>Northern Arizona HR Assn.</td>
<td>46</td>
<td>40</td>
<td>+15.0%</td>
<td>97.87%</td>
</tr>
<tr>
<td>Prescott Area HR Assn.</td>
<td>31</td>
<td>34</td>
<td>-8.8%</td>
<td>54.10%</td>
</tr>
<tr>
<td>Southwest Arizona HR Assn.</td>
<td>87</td>
<td>71</td>
<td>+22.5%</td>
<td>100.00%</td>
</tr>
<tr>
<td><strong>STATE</strong></td>
<td><strong>991</strong></td>
<td><strong>792</strong></td>
<td><strong>+25.1%</strong></td>
<td><strong>78.77%</strong></td>
</tr>
</tbody>
</table>

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**Star Chapters!**
### CHAPTER PERFORMANCE

#### HISTORICAL DATA

**Certified Members**

<table>
<thead>
<tr>
<th>Chapter Name</th>
<th># SHRM Members</th>
<th>Total # Mbrs in Chapter</th>
</tr>
</thead>
<tbody>
<tr>
<td>SHRM Of Greater Phoenix</td>
<td>433</td>
<td>504</td>
</tr>
<tr>
<td>SHRM of Greater Tucson</td>
<td>222</td>
<td>201</td>
</tr>
<tr>
<td>Central Arizona HR Mgmt. Assn.</td>
<td>11</td>
<td>6</td>
</tr>
<tr>
<td>Northern Arizona HR Assn.</td>
<td>41</td>
<td>39</td>
</tr>
<tr>
<td>Prescott Area HR Assn.</td>
<td>46</td>
<td>35</td>
</tr>
<tr>
<td>Southwest Arizona HR Assn.</td>
<td>66</td>
<td>66</td>
</tr>
</tbody>
</table>
### CHAPTER GOALS

**2020 MEMBERSHIP GOALS**

<table>
<thead>
<tr>
<th>CHAPTER GOALS</th>
<th>SHRM-GP</th>
<th>SHRM-GT</th>
<th>CAHRMA</th>
<th>NAHRA</th>
<th>PAHRA</th>
<th>SAHRA</th>
<th>AZSHRM</th>
</tr>
</thead>
<tbody>
<tr>
<td>GOAL # Mbrs in Chapter</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GOAL Chapter Affiliation %</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GOAL # of SHRM Certified</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
DETERMINING GOALS

GOAL SETTING PROCESS

- Gather
  - SHRM Results
  - Chapter Results
  - Member Survey
  - Other AAR

- Analyze
  - SHRM Data
  - Chapter Analysis
  - Determine Drives and Liabilities

- Create
  - Roll up Chapter Goals
  - Review Current Goals
  - Establish/Update Initial Goals
  - Strategize with Chapters and Council
Analyzing Our Data

2020 OPPORTUNITIES
WHAT WE KNOW
WHAT THE DATA TELLS US

Liabilities

• “Liquid leadership” in a couple of chapters (PAHRA, CAHRMA)
• The “100% decision” in SHRM-GP
• No data on retention rates
Drivers

• Strong positive increase in chapters
• Steady increase during past three years
• Positive growth in at-large membership
• Competent and experienced State Membership team

Scott Ferrin, SHRM-SCP
Membership Director

April Miller
Membership Deputy Director
Drivers

• Strong positive increase in chapters
• Steady increase during past three years
• Positive growth in at-large membership
• Competent and experienced State Membership team
• Intentional addition of District Directors and role clarification
• Underserved geographic areas
• Displaced chapter members into other chapters
• Strong engagement and support from State Council
DETERMINING GOALS

GOAL SETTING PROCESS

Gather

• SHRM Results
• Chapter Results
• Member Survey
• Other AAR

Analyze

• SHRM Data
• Chapter Analysis
• Determine Drives and Liabilities

Create

• Roll up Chapter Goals
• Review Current Goals
• Establish/Update Initial Goals
• Strategize with Chapters and Council
Create Initial Goals

2020 OPPORTUNITIES
OPERATIONAL GOAL

*Increase SHRM membership in Arizona by 6% by December 2020.*
*(currently +3.1%)*

*Increase retention rate to 82% (currently ??)*

**ACTIONS**

1. Provide needed chapter support
2. Maximize the State Conference strategy
2020 GOALS
MEMBERSHIP PRIORITIES

STRATEGIC GOAL

Increase SHRM affiliation in the state of Arizona to 100% by December 31, 2022.

ACTIONS

1. Schedule discussions with key chapter leaders (SHRM-GP and SHRM-GT) to discuss strategy.
2. Determine best approach to increase at-large members.

Planned milestones: Achieve 88% SHRM affiliation by December 31, 2020 and 90% by December 31, 2021 (currently 78.77%)
ACTIONS TO ACHIEVE
MEMBERSHIP PRIORITIES

ACTIONS
1. Communication & Chapter Membership Leader Support
2. Membership Acquisition
3. Membership Retention
4. Arizona State Conference/Legislative Conference
<table>
<thead>
<tr>
<th>Request</th>
<th>Amount</th>
<th>Link to the Strategic Plan</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Printed materials for each chapter for membership booth at State Conference | $400   | 5) Employment Law & Legislative Conference  
6) Flyers for conference  
7) Sponsorship proposal for conference  
8) Social media connection  
9) Miscellaneous membership recognition for chapters  
10) Postage for recognition gifts, thank you cards, etc. |                                                                                                                                     |
| Raffle items and signage                                                | $100   | 5) Employment Law & Legislative Conference  
6) Sponsorship proposal for conference  
7) Social media connection  
8) Miscellaneous membership recognition for chapters  
9) Postage for recognition gifts, thank you cards, etc. |                                                                                                                                     |
| SHRM At-Large mailing                                                  | $5,501 | 2) Membership Acquisition  
3) Implement a statewide mailing to at-large members in May 2019  
4) Arizona State Conference  
5) Selling HR to local business leaders (via chamber of commerce) about the benefits of having their HR departments join SHRM | 2018 ACTUAL: $770.50 (printing) + $1,275 (design) = $2,045.50                                                                 |
| Business Leaders Mailing                                             | $250   | 2) Membership Acquisition  
3) Consider mailing to local business leaders (via chamber of commerce) about the benefits of having their HR departments join SHRM | This would be a targeted/pilot effort with a few chapters to see if it is worth exploring further. Would need to closely coordinate with the branding committee. |
| Membership Giveaways at State Conference                              | $3,000 | 4) Arizona State Conference  
5) Selling HR to local business leaders (via chamber of commerce) about the benefits of having their HR departments join SHRM | 2018 ACTUAL: $1,226.44 (giveaways) + $377.71 (bookmarks)                                                                 |
| Printed materials for each chapter for membership booth at State Conference | $1,500 | 4) Arizona State Conference  
5) Selling HR to local business leaders (via chamber of commerce) about the benefits of having their HR departments join SHRM |                                                                                                                                     |
| Display posterboard and other signage/display boards for the booth, as well as laminated instruction cards for volunteers | $250   | 6) Display poster board for members of local chapters to write down what they like about their chapter and why they join – what value does it bring to you?  
7) Social media connection  
8) Miscellaneous membership recognition for chapters  
9) Postage for recognition gifts, thank you cards, etc. |                                                                                                                                     |
| Buttons for all local chapter members to wear at conference - **Ask me, I'm a local chapter member!**  | $300   | 4) Arizona State Conference  
5) Selling HR to local business leaders (via chamber of commerce) about the benefits of having their HR departments join SHRM | 2018 ACTUAL: $129.14                                                                                                               |
| Misc. membership recognition for chapters                              | $400   | 6) Chapter Membership Leader Support  
7) Miscellaneous membership recognition for chapters  
8) Postage for recognition gifts, thank you cards, etc. | Include recognition for membership committee members. To recognize with small prizes, gifts at state council meetings, etc. |
| Postage for recognition gifts, thank you cards, etc.                 | $100   | 6) Chapter Membership Leader Support  
7) Miscellaneous membership recognition for chapters  
8) Postage for recognition gifts, thank you cards, etc. |                                                                                                                                     |
| **TOTAL**                                                             | **$11,801** |                                                                                              |                                                                                                                                     |
DETERMINING GOALS

GOAL SETTING PROCESS

Gather
- SHRM Results
  - Chapter Results
  - Member Survey
  - Other AAR

Analyze
- SHRM Data
- Chapter Analysis
- Determine Drives and Liabilities

Create
- Roll up Chapter Goals
- Review Current Goals
- Establish/Update Initial Goals
- Strategize with Chapters and Council
Thank you!!

Let’s Connect!

Linda Dausend, CPLP
State Director-Elect
Arizona State Council
Idausend@flashpointleadership.com
Workshop:

You know your state, where the opportunities are, and have heard from your peers talk about their best practices

NOW what are your plans to capture the opportunities

Develop a first draft/early ideas of your Membership Acquisition and Retention Plan for your state.
Best Practices from Your Peers

2020 State Goals and Action Plans

Presented by:

Michael Latsko, VA State Council Director

Megan Neil, ID State Council Director

Kathy Hardcastle, TX State Council Director
# 2019 Results (Q3 2018 to 2019)
## Overall Region Comparison

<table>
<thead>
<tr>
<th>Region</th>
<th>2019 Members</th>
<th>2018 Members</th>
<th>YoY Change</th>
<th>YoY Change</th>
<th>2019 % GOAL</th>
<th>2019 # GOAL</th>
<th>Var to $ GOAL</th>
<th>Var to # GOAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>North Central</td>
<td>54,514</td>
<td>53,657</td>
<td>857</td>
<td>1.6%</td>
<td>4%</td>
<td>55,865</td>
<td>-2.4%</td>
<td>(1351)</td>
</tr>
<tr>
<td>Northeast</td>
<td>58,538</td>
<td>57,336</td>
<td>1,202</td>
<td>2.1%</td>
<td>4%</td>
<td>59,367</td>
<td>-1.4%</td>
<td>(829)</td>
</tr>
<tr>
<td>Pac West</td>
<td>46,180</td>
<td>44,715</td>
<td>1,465</td>
<td>3.3%</td>
<td>4%</td>
<td>46,512</td>
<td>-0.7%</td>
<td>(332)</td>
</tr>
<tr>
<td>Southeast</td>
<td>62,178</td>
<td>61,955</td>
<td>223</td>
<td>0.4%</td>
<td>3%</td>
<td>64,093</td>
<td>-3.0%</td>
<td>(1,915)</td>
</tr>
<tr>
<td>Southwest Central</td>
<td>50,546</td>
<td>49,510</td>
<td>1,036</td>
<td>2.1%</td>
<td>4%</td>
<td>51,483</td>
<td>-1.8%</td>
<td>(937)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>271,956</strong></td>
<td><strong>267,173</strong></td>
<td><strong>4,783</strong></td>
<td><strong>1.8%</strong></td>
<td><strong>3.8%</strong></td>
<td><strong>277,322</strong></td>
<td><strong>-1.9%</strong></td>
<td><strong>(5366)</strong></td>
</tr>
</tbody>
</table>
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NOW what are your plans to capture the opportunities?

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Happy Saturday and Welcome Back:

Finish up the final touches of your plans for your state and be prepared to share your work with your peers at 9:15am.

But first…some pretty cool best practices session on virtual chapter meetings.
Recap for those joining us in the room…
Welcome back!!! It’s Saturday, our race continues….

• We had a discussion on Why Data is Important and heard from SHRM on how they use data for Membership Acquisition and Retention

• The we looked at your states data and heard from your peers on how they have gone about this work

• We shared best practices, did some ideation after hearing from another group of peers, then began to form some thoughts on how you might approach your membership plan in your state

• NOW it is time to review a plan…here is where you come in..
Report Out Time – Share Your Plan
Report Out Time – Share Your Plan
State Council Challenge

When Chapters Struggle with understanding the Value of their State Council
Best Practices from Your Peers

Learning from others – we are all in a different place

Presented by:

Betty Wilcher, VA State Council Director-Elect
Heather Deyrieux, FL State Council Director

Trisha Zulic, CA State Council Director
Kathy Hardcastle, TX State Council Director