



Chapter Activities by Month

REVISED – DECEMBER 2020

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.

January

Required	Recommended	Review
<ul style="list-style-type: none"> • Hold a planning meeting with new board using SHAPE planning workbook and be sure to include a succession planning discussion. • Participate in your state leadership conference if one is held. Contact your State Council Director for more information. • Complete the SHAPE 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. Your membership Director and Certification Lead should also be SHRM Members as well as Chapter members. If your bylaws require that other chapter board members are SHRM members, ensure that they remain SHRM members throughout the year. • 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 chapter leaders and board since the last CLIF was submitted the month prior, please report them to your Member Engagement Associate (MEA) so all SHRM communication goes to the correct chapter leader in that role • 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. • Membership Director - please submit to your Member Engagement Associate chapter membership updates (new SHRM members who have joined/left the chapter) by the 5th business day prior to the end of the month to be processed. 	<ul style="list-style-type: none"> • Fill your vacant volunteer leader positions, and/or solicit volunteers. • Develop and communicate your chapter’s short- and long-term goals. • Provide the SHRM Volunteer Leaders Board Training to all volunteer leaders. • 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. • Mark your calendars for key events during the year, such as the Corel Leadership Area (CLA) calls and webinars, state council meetings (chapter presidents should attend these meetings), state leadership events, SHRM Conference, 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 your committees/board members. • Set up process for tracking member acquisition and member retention – refer to the Membership CLA section in the VLRC. • Encourage your board and committee members to participate in SHRM Connect groups or the Volunteer Exchange to share practices and ideas. • All chapters have access to the SHRM E-Blast Program to promote their membership and events to at-large SHRM members in the chapter’s zip code range. Complete the appropriate online request form found on the VLRC. • Check out the annual Volunteer Webcast Schedule and have your CLA leaders mark on their calendars the upcoming webinars they can attend. All CLA topics have a webinar every quarter. • Use the quarterly rolling PowerPoint with updates from SHRM at your chapter meetings during networking time. You can find it under the “What’s new” section. • Submit your monthly program for recertification credits with the SHRM Recertification Provider Program • Promote the SHRM Foundation Scholarships. 	<ul style="list-style-type: none"> • Share with new volunteers how to access the VLRC and review the tools/resources pertinent to their role 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. • 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. • With your board, review the SHAPE initiatives each month to be sure you are on track for an Excel award and to meet SHRM’s requirements in Section 1 of the SHAPE.

February

	Required	Recommended	Review
	<ul style="list-style-type: none"> Has the chapter changed banks or bank accounts recently? Ensure that your Treasurer has access to chapter bank accounts and finances so they can accurately review and record Chapter Financial Support Payments (CFSP). Ensure that the chapter is using the correct “affiliate of” SHRM logo- you can review our new SHRM Graphics Standards and Use Requirements on the VLRC. If there have been any changes within your board and volunteer leaders, report them to your Member Engagement Associate. Determine who from your board will be participating in state council meetings, the state leadership conference, state annual conference, and the SHRM Volunteer Leaders Business Meeting and SHRM Annual Conference. It is important to put these events on your board’s calendars early to guarantee your organization is represented and to receive credit for SHAPE. It is preferred that the president and/or president-elect be the representative at the SHRM Volunteer Leaders Business Meeting. 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"> Consider a membership drive. Swap ideas and share best practices on growing membership via our Volunteer Exchange platform. All chapters have access to the SHRM E-Blast Program to promote their membership and events to at-large SHRM members in the chapter’s zip code range. Complete the appropriate online request form found on the VLRC. Celebrate African-American History Month with your chapter with a program on a diversity topic Budget for your contribution to the SHRM Foundation. You can either send a check immediately, or if you know you will not make a donation until later in the year, you can also make a pledge. You can also make a donation online. Promote the SHRM Foundation Scholarships. Use the quarterly rolling PowerPoint with updates from SHRM at your chapter meetings during networking time. You can find it under the “What’s new” section. Submit your monthly program for recertification credits with the SHRM Recertification Provider Program. Make sure all of your Core Leadership Area (CLA) directors and committee chairs are participating in the Volunteer Leader Webcasts. Check out our new Campaign in a Box on the VLRC that has an array of social media tools promoting both chapter and SHRM membership along with other important SHRM initiatives. 	<ul style="list-style-type: none"> Review e-mails from SHRM Volunteer Communications for news and updates from SHRM. With your board, review the SHAPE initiatives each month to be sure you are on track for an Excel award and to meet SHRM’s requirements in Section 1 of the SHAPE.

March

Required	Recommended	Review
<ul style="list-style-type: none"> Promote the SHRM Annual Conference - there are templates and graphics available on the VLRC to promote at the chapter level. Be sure that you are maintaining your chapter affiliation requirement throughout the year. If there have been any changes within your board and volunteer leaders, report them to your Member Engagement Associate. Promote the SHRM Certification Program and encourage members to become certified. Membership Director - please submit to your Member Engagement Associate chapter membership updates (new SHRM members who have joined/left the chapter) by the 5th business day prior to the end of the month to be processed. 	<ul style="list-style-type: none"> Consider sending a representative to attend the first of SHRM Conferences, Workplace Policy Conference. Use the quarterly rolling PowerPoint with updates from SHRM at your chapter meetings during networking time. You can find it under the "What's new" section. Submit your monthly program for recertification credits with the SHRM Recertification Provider Program. Make sure all of your Core Leadership Area (CLA) directors and committee chair are participating in the CLA teleconferences and webinars. All chapters have access to the SHRM E-Blast Program to promote their membership and events to at-large SHRM members in the chapter's zip code range. Complete the appropriate online request form found on the VLRC. The Excel Award Deadline is March 15th – all chapters who wish to apply for this award, please submit online by this final deadline. Conduct an internal audit of your chapter roster against the SHRM chapter roster, the SHRM at-large list, and the SHRM expired-member list to ensure that your chapter records match SHRM's records. We suggest conducting an internal audit of your membership at minimum once every quarter. 	<ul style="list-style-type: none"> Review e-mails from SHRM Volunteer Communications for news and updates from SHRM. With your board, review the SHAPE initiatives each month to be sure you are on track for an Excel award and to meet SHRM's requirements in Section 1 of the SHAPE.

April

Required	Recommended	Review
<ul style="list-style-type: none"> Promote the SHRM Annual Conference - there are templates and graphics available on the VLRC to promote at the chapter level. If there have been any changes within your board and volunteer leaders, report them to your Member Engagement Associate. Promote SHRM Certification Program and encourage members to become certified. Membership Director - please submit to your Member Engagement Associate (MEA) membership updates (new SHRM members who have joined/left the chapter) by the 5th business day prior to the end of the month to be processed. 	<ul style="list-style-type: none"> Promote the SHRM Foundation Scholarships. If you are a chapter that sponsors a SHRM Student Chapter, remind them that the Student Merit Award submission deadline is April 15th. Encourage them to submit for a Merit Award which recognizes outstanding achievement within their chapter for the school year. All chapters have access to the SHRM E-Blast Program to promote their membership and events to at-large SHRM members in the chapter's zip code range. Complete the appropriate online request form found on the VLRC. Use the quarterly rolling PowerPoint with updates from SHRM at your chapter meetings during networking time. You can find it under the "What's new" section. Submit your monthly program for recertification credits with the SHRM Recertification Provider Program. Make sure all of your Core Leadership Area (CLA) directors and committee chair are participating in the CLA teleconferences and webinars. 	<ul style="list-style-type: none"> Review e-mails from SHRM Volunteer Communications for news and updates from SHRM. With your board, review the SHAPE initiatives each month to be sure you are on track for an Excel award and to meet SHRM's requirements in Section 1 of the SHAPE. The 1st Quarter SHRM Quarterly Membership Report will be distributed to Chapter Presidents and/or CMP's this month, we encourage you to review and ensure your membership aligns with SHRM data.

May

Required

- If there have been any changes within your board and volunteer leaders, report them to your [Member Engagement Associate](#).
- Promote the [SHRM Certification Program](#) and encourage members to become certified.
- If your board transitions mid-year, please send your full volunteer roster to SHRM including all contact information via the **CLIF**.
- Membership Director - please submit to your Member Engagement Associate chapter membership updates (new SHRM members who have joined/left the chapter) by the 5th business day prior to the end of the month to be processed.
- Promote the [SHRM Annual Conference](#) - there are templates and graphics available on the [VLRC](#) to promote at the chapter level.

Recommended

- All chapters have access to the SHRM E-Blast Program to promote their membership and events to at-large SHRM members in the chapter's zip code range. Complete the [appropriate online request form](#) found on the VLRC.
- Use the [quarterly rolling PowerPoint](#) with updates from SHRM at your chapter meetings during networking time. You can find it under the "What's new" section.
- Send out information to your certified members on the SHRM [recertification process](#).
- Consider joining [SHRM Connect](#) and starting a group for your chapter members to communicate.
- Promote the [SHRM Foundation Scholarships](#).
- Submit your monthly program for recertification credits with the [SHRM Recertification Provider Program](#).
- Make sure all of your [Core Leadership Area \(CLA\)](#) directors and committee chair are participating in the [CLA teleconferences and webinars](#).

Review

- Review e-mails from SHRM Volunteer Communications for news and updates from SHRM.
- Determine if your organization will be submitting for a [Pinnacle Award](#) – the deadline to apply is September 1st.
- With your board, review the [SHAPE initiatives](#) each month to be sure you are on track for an Excel award and to meet SHRM's requirements in Section 1 of the SHAPE.

	Required	Recommended	Review
<h1>June</h1>	<ul style="list-style-type: none"> Do not hold any educational event for over 200 participants during June, since it conflicts with the SHRM Annual Conference If your board transitions mid-year, please send your full volunteer roster to SHRM including all contact information via the CLIF. If there have been any changes within your board and volunteer leaders, report them to your Member Engagement Associate. Promote the SHRM Certification Program and encourage members to become certified. Membership Director - please submit to your Member Engagement Associate (MEA) membership updates (new SHRM members who have joined/left the chapter) by the 5th business day prior to the end of the month to be processed. Due to SHRM's Annual Conference, June is a black-out period for state and affiliate E-Blasts. No messages will be sent out during this month. 	<ul style="list-style-type: none"> Submit your monthly program for recertification credits with the SHRM Recertification Provider Program. Conduct an internal audit of your chapter roster against the SHRM chapter roster, the SHRM at-large list, and the SHRM expired-member list to ensure that your chapter records match SHRM's records. We suggest conducting an internal audit of your membership at minimum once every quarter. Make sure all of your Core Leadership Area (CLA) directors and committee chair are participating in the CLA teleconferences and webinars. 	<ul style="list-style-type: none"> Review e-mails from SHRM Volunteer Communications for news and updates from SHRM. With your board, review the SHAPE initiatives each month to be sure you are on track for an Excel award and to meet SHRM's requirements in Section 1 of the SHAPE.

	Required	Recommended	Review
<h1>July</h1>	<ul style="list-style-type: none"> If there have been any changes within your board and volunteer leaders, report them to your Member Engagement Associate. Promote the SHRM Certification program and encourage members to become certified. Membership Director - please submit to your Member Engagement Associate (MEA) membership updates (new SHRM members who have joined/left the chapter) by the 5th business day prior to the end of the month to be processed. 	<ul style="list-style-type: none"> Hold a mid-year strategic planning/review meeting for your organization and review the SHAPE document to ensure you are on track. All chapters have access to the SHRM E-Blast Program to promote their membership and events to at-large SHRM members in the chapter's zip code range. Complete the appropriate online request form found on the VLRC. Use the quarterly rolling PowerPoint with updates from SHRM at your chapter meetings during networking time. You can find it under the "What's new" section. Submit your monthly program for recertification credits with the SHRM Recertification Provider Program. Make sure all of your Core Leadership Area (CLA) directors and committee chair are participating in the CLA teleconferences and webinars. 	<ul style="list-style-type: none"> Review e-mails from SHRM Volunteer Communications for news and updates from SHRM. With your board, review the SHAPE initiatives each month to be sure you are on track for an Excel award and to meet SHRM's requirements in Section 1 of the SHAPE.

August

Required

- Prepare your volunteer slate of officers to hold elections in accordance with your bylaws. Review your [volunteer succession plan](#); determine where you will need volunteers to fill roles on your board and committees. Start soliciting for new volunteers!
- President-elect and/or president should plan to attend and register for the November [SHRM Volunteer Leader Business meeting \(VLBM\)](#) (book hotel and travel). E-mail invitations will be sent sometime during late August.
- If there have been any changes within your board and volunteer leaders, report them to your [Member Engagement Associate](#).

Recommended

- [Pinnacle Award applications](#) due September 1.
- Promote the [SHRM Learning System](#) as a certification study tool for your members.
- [Educate your members on the SHRM Foundation](#). Consider holding a [fundraiser to benefit the SHRM Foundation](#)—donations must be received by [October 15](#) for your chapter to be recognized at the [SHRM Volunteer Leader Business Meeting](#).
- All chapters have access to the SHRM E-Blast Program to promote their membership and events to at-large SHRM members in the chapter's zip code range. Complete the [appropriate online request form](#) found on the VLRC.
- Use the [quarterly rolling PowerPoint](#) with updates from SHRM at your chapter meetings during networking time. You can find it under the "What's new" section.
- Submit your monthly program for recertification credits with the [SHRM Recertification Provider Program](#).
- Make sure all of your [Core Leadership Area \(CLA\)](#) directors and committee chair are participating in the [CLA teleconferences and webinars](#).

Review

- Review e-mails from SHRM Volunteer Communications for news and updates from SHRM.
- With your board, review the [SHAPE initiatives](#) each month to be sure you are on track for an Excel award and to meet SHRM's requirements in Section 1 of the SHAPE.

September

Required

- If there have been any changes within your board and volunteer leaders, report them to your [Member Engagement Associate](#).
- President-elect and/or president should plan to attend and register for the November [SHRM Volunteer Leader Business Meeting \(VLBM\)](#). (book hotel and travel). E-mail invitations will be sent sometime during late August.
- Promote the [SHRM Certification program](#) and encourage members to become certified.
- Membership Director - please submit to your Member Engagement Associate (MEA) membership updates (new SHRM members who have joined/left the chapter) by the 5th business day prior to the end of the month to be processed.
- Hold your elections in September if possible so that you can get the list of your board members to SHRM by the December 1 deadline, and so that your incoming president can register for the Volunteer Leader Business Meeting (VLBM) before the registration cutoff in late October.

Recommended

- [Educate your members on the SHRM Foundation](#). Consider holding a fundraiser to benefit the SHRM Foundation—donations must be received by October 15 for your chapter to be recognized at the [SHRM Volunteer Leader Business Meeting \(VLBM\)](#), formerly the SHRM Leadership Conference.
- Now that local colleges are back in session, consider hosting a special “college night” where you invite college HR students and faculty to meet with the HR professionals (see [college relations best practices](#) or the [SHAPE planning workbook](#) for other ideas).
- All chapters have access to the SHRM E-Blast Program to promote their membership and events to at-large SHRM members in the chapter’s zip code range. Complete the [appropriate online request form](#) found on the VLRC.
- Use the [quarterly rolling PowerPoint](#) with updates from SHRM at your chapter meetings during networking time. You can find it under the “What’s new” section.
- Submit your monthly program for recertification credits with the [SHRM Recertification Provider Program](#).
- Conduct an internal [audit of your chapter roster](#) against the SHRM chapter roster, the SHRM at-large list, and the SHRM expired-member list to ensure that your chapter records match SHRM’s records. We suggest conducting an internal audit of your membership at minimum once every quarter.
- Make sure all of your [Core Leadership Area \(CLA\)](#) directors and committee chair are participating in the [CLA teleconferences and webinars](#).

Review

- Review e-mails from SHRM Volunteer Communications for news and updates from SHRM.
- With your board, review the [SHAPE initiatives](#) each month to be sure you are on track for an Excel award and to meet SHRM’s requirements in Section 1 of the SHAPE.

October

Required

- If there have been any changes within your board and volunteer leaders, report them to your [Member Engagement Associate](#).
- Promote the [SHRM Certification program](#) and encourage members to become certified.
- Membership Director - please submit to your Member Engagement Associate (MEA) membership updates (new SHRM members who have joined/left the chapter) by the 5th business day prior to the end of the month to be processed.

Recommended

- Consider holding a program commemorating National Disability Employment Awareness Month.
- If desired, conduct an [installation of new officers with the script](#) provided by SHRM. Your past president would be a good person to conduct the ceremony.
- All chapters have access to the SHRM E-Blast Program to promote their membership and events to at-large SHRM members in the chapter's zip code range. Complete the [appropriate online request form](#) found on the VLRC.
- Use the [quarterly rolling PowerPoint](#) with updates from SHRM at your chapter meetings during networking time. You can find it under the "What's new" section.
- Submit your monthly program for recertification credits with the [SHRM Recertification Provider Program](#).
- Make sure all of your [Core Leadership Area \(CLA\)](#) directors and committee chair are participating in the [CLA teleconferences and webinars](#).

Review

- Review e-mails from SHRM Volunteer Communications for news and updates from SHRM.
- With your board, review the [SHAPE initiatives](#) each month to be sure you are on track for an Excel award and to meet SHRM's requirements in Section 1 of the SHAPE.

November	Required	Recommended	Review
	<ul style="list-style-type: none"> President and/or president-elect should attend SHRM Conference. At your next board meeting, discuss sessions, new information, and share resources obtained at conference. Submit Chapter Leader Information Form showing the FULL list of board members no later than 12/1. Membership Director - please submit to your Member Engagement Associate (MEA) membership updates (new SHRM members who have joined/left the chapter) by the 5th business day prior to the end of the month to be processed. 	<ul style="list-style-type: none"> Set up and distribute your chapter meetings calendar for the upcoming year. Promote the SHRM Certification program and encourage members to become certified. If desired, conduct an installation of new officers with the script provided by SHRM. Your past president would be a good person to conduct the ceremony. All chapters have access to the SHRM E-Blast Program to promote their membership and events to at-large SHRM members in the chapter's zip code range. Complete the appropriate online request form found on the VLRC. Use the quarterly rolling PowerPoint with updates from SHRM at your chapter meetings during networking time. You can find it under the "What's new" section. Submit your monthly program for recertification credits with the SHRM Recertification Provider Program. Make sure all of your Core Leadership Area (CLA) directors and committee chair are participating in the CLA teleconferences and webinars. 	<ul style="list-style-type: none"> Review e-mails from SHRM Volunteer Communications for news and updates from SHRM. With your board, review the SHAPE initiatives each month to be sure you are on track for an Excel award and to meet SHRM's requirements in Section 1 of the SHAPE.

December	Required	Recommended	Review
	<ul style="list-style-type: none"> Submit Chapter Leader Information Form showing the FULL list of board members no later than 12/1. Late submissions may cause your chapter to be ineligible for a SHAPE award. Promote the SHRM Certification program and encourage members to become certified. Membership Director - please submit to your Member Engagement Associate (MEA) membership updates (new SHRM members who have joined/left the chapter) must be received by December 15th to be processed by the end of the year. 	<ul style="list-style-type: none"> If you haven't already donated to the SHRM Foundation, send in your donation before 12/31. The Foundation cannot accept donations for a previous year's credit. Set up and distribute your chapter meeting calendar for the upcoming year. If you have board members transitioning, guarantee the new board members receive all information needed to be successful. Also, be sure to include planning for your budget. Set up teleconferences or an in-person meeting with new board members to guarantee a smooth transition. If desired, conduct an installation of new officers with the script provided by SHRM. Your past president would be a good person to conduct the ceremony. Develop and communicate your chapter's short- and long-term goals. Provide a volunteer position profiles to the board and your expectations for the year. Submit your monthly program for recertification credits with the SHRM Recertification Provider Program. Conduct an internal audit of your chapter roster against the SHRM chapter roster, the SHRM at-large list, and the SHRM expired-member list to ensure that your chapter records match SHRM's records. We suggest conducting an internal audit of your membership at minimum once every quarter. Make sure all of your Core Leadership Area (CLA) directors and committee chair are participating in the CLA teleconferences and webinars. 	<ul style="list-style-type: none"> Send out your bylaws to new chapter board members and request that they also familiarize themselves with Parliamentary Procedures. Review all volunteer positions and solicit your membership for volunteers if required. If you are a new president, determine what your legacy will be during your term in office. Review e-mails from SHRM Volunteer Communications for news and updates from SHRM. With your board, review the SHAPE initiatives each month to be sure you are on track for an Excel award and to meet SHRM's requirements in Section 1 of the SHAPE.

