Leading your Chapter’s Membership Growth: Tips for conducting a successful SHRM Chapter Audit

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Your Presenters

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What we’ll discuss today

OVERVIEW
PREPARING FOR A SUCCESSFUL AUDIT
PROCESSING THE AUDIT
EXPLAINING THE RESULTS
AFTER THE AUDIT: TAKING ACTION
What is the Audit and why must you submit one?

An official inspection of the chapter's membership roster in order to ensure the chapter maintains SHRM's affiliation requirements to remain in good standing.

The rosters are required for the chapter to participate in and be eligible for SHRM's Chapter Financial Support Program (CFSP) the following year.
Financial Support Program

CFSP – Chapter Financial Support Program

100% Chapter
- $25 per dual member
- Paid quarterly @$6.25

Non-100% Chapter
- $10 per dual member
- Paid twice per year @ $5

Net Gains
- $25 per additional dual member
- End of Year vs Prior Year

Your chapter receives payment for members that have designated your chapter as their primary chapter.

*Chapters and State Councils must be in Good Standing to be eligible for CFSP*
Audit Timeline

**July – September/October**
- Initial audit message with audit template sent out to all chapters.
- Chapter works with Board to complete and send in audit/re-audit if necessary.

**September–October**

**November–December**
- After audit is complete chapter uses this time to follow up with potential/lapsed members, ask any questions, and use audit data to set goals for chapter.
Chapter Membership

Chapter Audits

Why does SHRM conduct chapter audits?

For two reasons: SHRM Chapter Financial Support (CFSP) and SHRM’s chapter affiliation requirements.

Each year all chapters are required to submit a copy of their chapter membership rosters to SHRM. The rosters are required in order for the chapter to participate in and be eligible for SHRM’s Chapter Financial Support Program (CFSP) and to determine if the chapter meets SHRM’s affiliation requirements.

- SHRM reimburses the chapters $25 per member per year for 100% chapters (all chapter members are SHRM members) and $10 per year per SHRM member for non-100% chapters.
- For affiliation, SHRM requires that all chapters chartered prior to January 1, 2004 have 30% or 10 SHRM members whichever is greater. All chapters chartered on or after January 1, 2004 must have 51% or 25 SHRM members, which is greater. The more SHRM members a chapter has, the more financial support the chapter will receive. and the higher the percentage of SHRM members will be, making it in the best interest of the chapter...
Preparing for a Successful Audit

1. Start preparing at the end of June and request roster from MEA
2. Use Audit template sent by MEA team
3. Do not change field headers on audit template
4. Make sure full SHRM member name and email address is used
5. PRO TIP! Request monthly roster from your MEA to stay up to date with SHRM
Processing the Audit

• SHRM uses software that processes the audit.

• **Here’s why using field headers in the audit template matters!**

• The software uses these headers to find chapter members and match them to your chapter.

• First Name, Last Name and SHRM account email are the most important fields.
Audit Letter Overview

The following 1 SHRM members were found on your submitted roster and have now been flagged in our database as your chapter members:

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ann</td>
<td>Doe</td>
<td><a href="mailto:Ann.doe@do.com">Ann.doe@do.com</a></td>
</tr>
</tbody>
</table>
Audit Letter Overview

The following 2 SHRM members were not found on the roster you submitted and so they have been unflagged from your chapter in our database and coded to an at-large status. If any of these individuals are in fact members of your chapter, please provide us with the individual's name, address, and additional email address/es.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bruce</td>
<td>Wills</td>
</tr>
<tr>
<td>Nikki</td>
<td>Perkins</td>
</tr>
</tbody>
</table>
Audit Letter Overview

The following 2 chapter members that were on the roster your chapter provided have allowed their SHRM membership to lapse and are now considered expired SHRM members:

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>SHRM Membership Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mark</td>
<td>Davila</td>
<td>5/31/2021</td>
</tr>
<tr>
<td>Tom</td>
<td>Jones</td>
<td>5/31/2021</td>
</tr>
</tbody>
</table>
Audit Letter Overview

The following 3 chapter members are SHRM members who have designated another SHRM affiliated chapter as their primary chapter. These chapter members are counted for affiliation purposes only but not for the Chapter Financial Support Program.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Chapter #</th>
<th>Chapter Name</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Kristy</td>
<td>Parola</td>
<td>000</td>
<td>XYZ</td>
<td></td>
</tr>
<tr>
<td>Faith</td>
<td>Stipanovich</td>
<td>0000</td>
<td>XYZ</td>
<td></td>
</tr>
<tr>
<td>Bob</td>
<td>Newman</td>
<td>000</td>
<td>XYZ</td>
<td></td>
</tr>
</tbody>
</table>
Audit Letter Overview

The following 1 member that were on the roster provided by the Chapter were not found in the SHRM database using the information provided. These individuals are considered Local Chapter Members Only (LMO). If a SHRM Membership ID # is listed it was provided by the chapter, but despite having it we were unable to create a match with the data in the SHRM system. If any of these members believe they are current SHRM members please send me their names, addresses and additional email addresses so that we can try to locate them.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Susan</td>
<td>Post</td>
<td><a href="mailto:Susan.post@shrm.org">Susan.post@shrm.org</a></td>
</tr>
</tbody>
</table>
Audit Letter Overview

Total Chapter Members = 282

Number of Dual Members (Members of Chapter and SHRM) = 154

Multi chapter members = 101 (These are members who have designated another chapter as their Primary chapter)

SHRM affiliation percentage = 90.4% (Dual Members + Multi Chapter Members) / Total Chapter Members = SHRM Affiliation Percentage
SHRM Affiliation Percentages Explained

**Non 100% chapter numbers 0001-0689**
- 30% affiliation or 10 SHRM members whichever is greater

**Non 100% chapter numbers 0690-0750**
- 51% affiliation or 25 SHRM members whichever is greater

**Non 100% chapter numbers 0751 and above**
- 51% affiliation AND 25 SHRM members

**100% chapters**
- 90% affiliation or higher
Taking Action Post-Audit

What activities worked/didn’t work to grow your membership?

What do you need to do to meet or exceed your dual membership goal?

Create a SMART action plan to win back expired members, convert local members
How can SHRM help me keep track of members and membership?

- **Quarterly Membership reports**
  - Sent quarterly to Presidents, Certification and Membership Directors.
  - Ask your President or MEA to send you the report!

- **Request rosters** from your Membership Engagement Associate (MEA)
  - Provides Dual Members including email address.
# Membership Resources – Quarterly Membership and Certification Reports

<table>
<thead>
<tr>
<th>Chapter Number</th>
<th>State</th>
<th>Chapter Name</th>
<th>Dec 2019</th>
<th>Dec 2020</th>
<th>Mar-21</th>
<th>Growth Mar vs Dec</th>
<th>Total Chapter</th>
<th>Total SHRM Members</th>
<th>Multi Members</th>
<th>LMOs</th>
<th>Affiliation %</th>
<th>Certified SHRM members primarily coded to chapter</th>
</tr>
</thead>
<tbody>
<tr>
<td>206</td>
<td>DE</td>
<td>Delaware Chapter SHRM</td>
<td>259</td>
<td>185</td>
<td>107</td>
<td>1%</td>
<td>266</td>
<td>164</td>
<td>9</td>
<td>93</td>
<td>65%</td>
<td>111</td>
</tr>
<tr>
<td>572</td>
<td>DE</td>
<td>Del Mar VA HR Group</td>
<td>41</td>
<td>31</td>
<td>10</td>
<td>0%</td>
<td>37</td>
<td>29</td>
<td>4</td>
<td>4</td>
<td>89%</td>
<td>19</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td>300</td>
<td>216</td>
<td>218</td>
<td>1%</td>
<td>300</td>
<td>216</td>
<td>4</td>
<td>4</td>
<td>89%</td>
<td>19</td>
</tr>
</tbody>
</table>

* 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 chapter as primary.

* Multi-Members are members of more than one chapter.

* Local Members Only (LMOs) are members who belong solely to the chapter and are NOT SHRM Members.

* CFSP is based on the number of professional/general/associate SHRM members primarily designated to the chapter at the end of the payment period.

**State Information**

<table>
<thead>
<tr>
<th>State Statistics</th>
<th>Dec-20</th>
<th>Mar-21</th>
<th>Growth Mar vs Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>SHRM Members in Chapters</td>
<td>236</td>
<td>218</td>
<td>1%</td>
</tr>
<tr>
<td>SHRM Members At-Large</td>
<td>621</td>
<td>614</td>
<td>-1%</td>
</tr>
<tr>
<td>SHRM Members in State</td>
<td>827</td>
<td>832</td>
<td>-1%</td>
</tr>
<tr>
<td>SHRM Members w/SHRM Certifications In-Chapter</td>
<td>131</td>
<td>120</td>
<td>-1%</td>
</tr>
<tr>
<td>SHRM Members w/SHRM Certifications At-Large</td>
<td>122</td>
<td>127</td>
<td>4%</td>
</tr>
<tr>
<td>SHRM Members w/SHRM Certifications In State</td>
<td>263</td>
<td>267</td>
<td>2%</td>
</tr>
</tbody>
</table>

Calculate Your Chapter’s Retention Rate here

<table>
<thead>
<tr>
<th>MS</th>
<th>ME</th>
<th>MN</th>
<th>Retention Rate*</th>
</tr>
</thead>
<tbody>
<tr>
<td>61</td>
<td>103</td>
<td>36</td>
<td>89%</td>
</tr>
</tbody>
</table>

Choose a time period (month, quarter, year) and then enter your Chapter’s data over the sample numbers in blue.

MS = Members at the start of time period
ME = Members at the end of time period
MN = Brand new members acquired during the time period

*Retention Rate = % members that renewed during the time period
Dual Membership Action Plan Template

- Available on the VLRC
- Download and insert your chapter goals and action steps
- Review during your monthly board meetings
- Use this with:
  - Strategic planning docs and quarterly reports
Membership Resources on VLRC

VLRC > Membership > Chapter  Marketing Samples & Templates

- Eblasts
- **Glossary**
- *Free Marketing Resources*
- Sample Direct Mail Templates
- Sample Phone Script
- **Internal At-Large Mailing List Request Form**
Visit the VLRC for 2021 Membership Core Leadership Area (CLA) Webinars

VLRC>Leadership>Webinar Schedule
Questions?

For additional questions contact your Field Service Director (FSD) and Member Engagement Associate (MEA)

For general membership questions please email: SHRM.memberrelations@shrm.org
THANK YOU

We truly appreciate all you do – and have done - on behalf of the HR profession.