



**BETTER WORKPLACES
BETTER WORLD™**

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

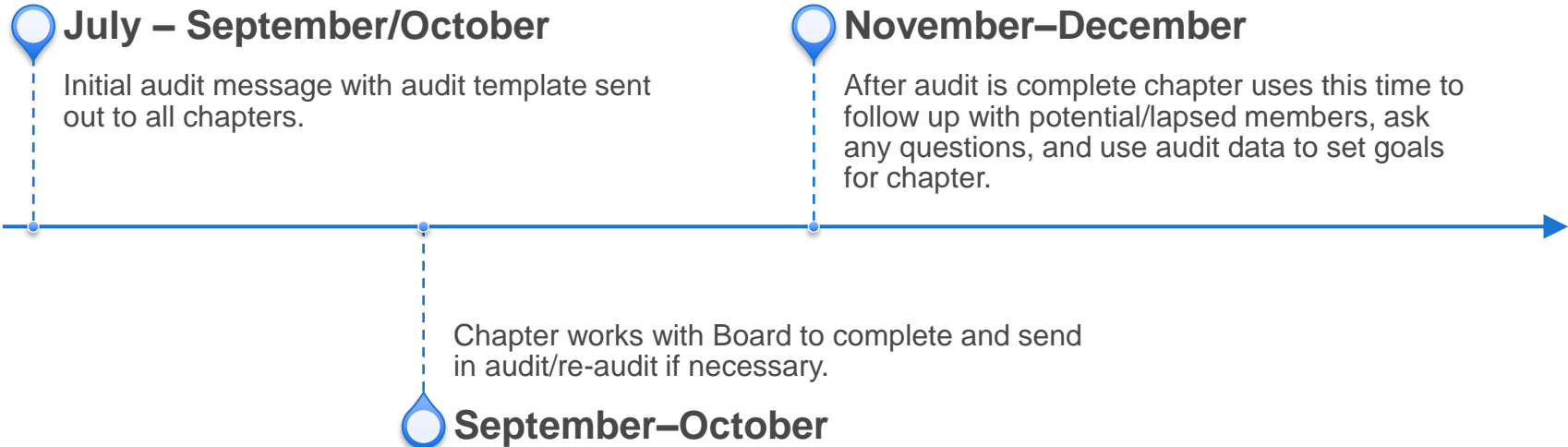
- *\$25 per additional dual member*
- *End of Year vs Prior Year*

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





VLRC – A Good Reference Tool

SHRM.org/VLRC Membership – Chapters – Audit

Chapter Membership

AUDITS



MAINTAINING YOUR CHAPTER MEMBERSHIP

MARKETING SAMPLES & TEMPLATES

[View 2021 Chapter Activities by Month](#)

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

Tiffany > 2020 Audit Information 2020 SHRM Audit Template - Saved

Formulas Data Review View Automate Help Tell me what you want to do Open in Desktop App

Calibri 11 A A Font Alignment Number Tables Cells

	C	D	E	F	G	H	I	J	K	L	M	N	O
Name	First Name	Middle Name	Last Name	Job Title	Certifications	Company Name	SHRM Member ID Number (Optional)	Primary Address 1	Primary Address 2	Primary Address 3	Primary City	Primary State	Primary Zip

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.

Requested member(s) for [REDACTED] 22

Chapter [REDACTED] Chapter import status:

- 68 chapter active member(s)
- 9 member(s) to add
- 137 member(s) to remove
- 3 multi-chapter member(s)
- 44 LMO member(s)
- 5 expired member(s)
- 2 student member(s)

Affiliation updates to AMS for chapter [REDACTED] ter.

- 11 member(s) will be added to the chapter
- 154 member(s) will be removed from the chapter



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:

First Name	Last Name	Email
Ann	Doe	Ann.doe@do.com



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.

First Name	Last Name
Bruce	Wills
Nikki	Perkins



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:

First Name	Last Name	SHRM Membership Expiration Date
Mark	Davila	5/31/2021
Tom	Jones	5/31/2021



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.

First Name	Last Name	Chapter #	Chapter Name
Kristy	Parola	000	XYZ
Faith	Stipanovich	0000	XYZ
Bob	Newman	000	XYZ



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.

First Name	Last Name	Email
Susan	Post	Susan.post@shrm.org



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

Delaware Quarterly Membership & Certification Report 2021													
SHRM IN-CHAPTER MEMBERSHIP							2020 Audit Information					Certified SHRM members primarily coded to chapter	
Chapter Number	100%	State	Chapter Name	Dec 2019	Dec 2020	Mar-21	Growth Mar vs Dec	Total Chapter	Total SHRM Members	Multi Members	LMOs		Affiliation %
206		DE	Delaware Chapter SHRM	259	185	187	1%	266	164	9	93	65%	111
572		DE	Del Mar Va HR Group	41	31	31	0%	37	29	4	4	89%	19
Total				300	216	218	1%						130

Calculate Your Chapter's Retention Rate here			
MS	ME	NM	Retention Rate*
94	103	27	81%

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
 NM = Brand new members acquired during the time period
 *Retention Rate = % of members that renewed during the time period

~ 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.
 ~ 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			
State Statistics	Dec-20	Mar-21	Growth Mar vs Dec
SHRM Members in Chapters	216	218	1%
SHRM Members At-Large	621	614	-1%
SHRM Members in State	837	832	-1%
SHRM Members w/ SHRM Certifications In-Chapter	131	130	-1%
SHRM Members w/ SHRM Certifications At-Large	132	137	4%
SHRM Members w/ SHRM Certifications in State	263	267	2%



Dual Membership Action Plan Template

1
SHRM AFFILIATE DUAL MEMBERSHIP PLAN SAMPLE

CHAPTER NAME:	SHRM DUAL MEMBERSHIP % GOAL: %
STATE:	SHRM DUAL MEMBERSHIP # GOAL:

DUAL MEMBERSHIP PLANS provide a road map to implement membership initiatives. They reflect the key actions associated with SMART Goals. Dual Membership Plans involve specific activities, responsibility levels, time frames, and outcomes to increase dual membership (Chapter + SHRM).

Consider the below questions and document your Action Plans to reach your identified membership goal.

1. WHAT specifically needs to be done? **START WITH A SMART GOAL**
2. HOW will it be done? **PLAN SPECIFIC ACTION ITEMS**
3. WHO will be responsible? **ESTABLISH OWNERS**
4. WHEN will it get done? **ESTABLISH A TIMELINE, MILESTONES, AND A COMPLETION DATE**
5. What will the **OUTCOMES** look like? **ENSURE GOAL OWNERS ARE WELL-ACQUAINTED WITH TARGETS**

ACTION PLANNING OVERVIEW			
(WHAT?)	Primary Objective: SHRM Dual Membership Growth (SHRM national + local chapter members)		
	SMART Goal: Increase SHRM Dual Membership by 5% by 12/31/2021		
	Resources: Membership Committee Volunteers, SHRM Eblasts, SHRM Quarterly Membership Report, FSD, MEA,		
ACTION PLAN			
Action Item (HOW?)	Owner (WHO?)	Due Date (WHEN?)	Outcome (TARGET)
Conduct a Member-Get-a-Member Campaign	Membership Director/Committee	9/30/21	

- 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](#)





VLRC

SHRM's Volunteer Leader Resource Center

CONTACT OUR TEAM

LEADERSHIP ▾

MEMBERSHIP ▾

BUSINESS OPERATIONS ▾

SHRM CERTIFICATION ▾

- Chapters
- State Councils
- Core Leadership Areas
- Membership Advisory Council
- Student Volunteer Leader Center
- Webinar Schedule**
- VLBM Presentations

SCHOLARSHIPS ▾

VOLUNTEER EXCHANGE



Webinar Schedule

SHRM Volunteer/Core Leadership Area (CLA) Webcast Information

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.