

## Frequently Asked Questions

### SHRM Affiliate Program for Excellence for 2012 (SHAPE)

**Q: What is SHAPE?**

A: SHAPE is an acronym for the SHRM Affiliate Program for Excellence. It is a planning and reporting tool that outlines the minimum requirements for chapters and state councils to remain in good standing with SHRM on an annual basis. It also outlines additional goals and measurements that must be met in order for chapters and state councils to receive recognition from SHRM.

SHAPE consists of a planning workbook, an online year-end report and a recognition program.

**Q: How do I get started? What needs to be done?**

A: Start by meeting with your board to plan your year using the tools available. In conjunction with your strategic plan, use the SHAPE Planning Workbook and the SHAPE Planning Worksheet. It's a good idea to designate an "owner" for the entire plan. This could be the chapter president or the past president or the state director or the past state director. A best practice for many chapters is to designate the president-elect to complete the SHAPE Year-End Report providing them the opportunity to learn more about your organization. Begin by assigning a leader who will be accountable for each step and the due date. Spend the most time on Section 2, which are the initiatives you will focus on. Monitor progress throughout the year, asking for updates on activity and completion. Once the online year-end report document is available (projected for 2<sup>nd</sup> quarter 2012), you can start entering information and saving. The report is due January 31, 2013, for both chapters and state councils.

**Q: How is the 2012 SHAPE different than the 2011 SHAPE?**

A: In 2011 we introduced some changes to SHAPE to make the process easier for our affiliates. For 2012, we've made further enhancements. You will find a document titled "Summary of Changes" posted in the SHAPE Center of the Volunteer Leaders' Resource Center (VLRC) at [www.shrm.org/vlrc](http://www.shrm.org/vlrc). In addition to making the reporting more user-friendly and simpler, we have reduced the quantity of some of the requirements and have built in more flexibility in several areas. We believe these changes will allow more of our chapters and state councils to achieve higher levels of recognition.

**Q: What are the SHAPE Planning Workbooks?**

A: SHAPE Planning Workbooks are tools that can be used throughout the year and include detailed instructions for each section of the program. There are two versions: one for chapters and another for state councils. The workbooks are available in the SHAPE Center of the Volunteer Leaders' Resource Center (VLRC) at [www.shrm.org/vlrc](http://www.shrm.org/vlrc). SHAPE Planning Workbooks

consist of four sections: 1) Basic Requirements; 2) Community-Based Chapter/State-Focused Council Initiatives; 3) SHRM Affiliate Engagement and 4) Measures of Success. The workbooks also include two appendices that provide resources and tools and a sample year-end report. Also in the VLRC, chapters and state councils can access an Idea Center to get those “creative juices” flowing. We hope you will download the appropriate workbook and review it with your chapter board or state council in more detail. This is a great tool to get your strategic plan started early.

**Q: I participated in a SHAPE webinar that provided an overview of the program. Are those webinar PowerPoint slides available?**

A: Yes, the webinar slides have been posted, along with hyperlinks to recorded webinars and the planning workbooks, in the VLRC in the SHAPE Center. The SHAPE Center is accessible from the front page of the VLRC as well as the Administration pages under “Resources for Chapters” and “Resources for State Councils.” Visit to [www.shrm.org/vlrc](http://www.shrm.org/vlrc). All of the details covered by the facilitator in our informational webinars can be found in the planning workbooks.

## SECTION 1: Basic Requirements

**Q: Is completing a SHAPE year-end report required?**

A: Yes, all chapters and state councils must complete a SHAPE Year-End Report annually. For 2012, the chapter due date is January 31, 2013. For state councils, the due date for the 2012 SHAPE Year-End Report has been moved up to January 31, 2013.

SHAPE measurements are for the calendar year January 1 through December 31, 2012.

Section 1 of both documents outlines the minimum requirements for our affiliated chapters and state councils to maintain “good standing” with SHRM. Completing all items in this section is a baseline of operations and will help you build a stronger foundation for success. Section 1 must be completed in full and submitted regardless of award eligibility. Sections 2 and 3 must be completed to qualify for any of the award levels.

**Q: There is a requirement that we offer complimentary booth space and podium time to SHRM staff to attend a chapter or state conference with more than 200 anticipated attendees. Will chapters/state councils have to pay for travel for SHRM staff to attend?**

A: You are required to offer SHRM complimentary booth space at your event in a high traffic area with good visibility. Field Services Directors (FSDs) who attend your chapter or state conference to staff a SHRM booth should be allowed to attend gratis. You should also allow 15 minutes of podium time during one of your general sessions for the FSD to present a SHRM update. They will plan on attending the entire state conference or provide another SHRM staff member (usually from SHRM’s Regional Team) to attend in their place. Attendance at chapter events with more than 200 anticipated attendees will be based on availability. Please inform

your FSD early in your planning process. In the event that the FSD is invited, but unable to attend or send another regional team member, the chapter will not be penalized.

As far as travel expenses, if you use SHRM staff (other than your FSDs) as a keynote or concurrent speaker at the event, your request must be made through the SHRM Speakers' Bureau at [www.shrm.org/speakers](http://www.shrm.org/speakers). Although 100 percent chapters are eligible for a speaker at no cost to the chapter (other than a requested contribution to the SHRM Foundation, and based on availability), non-100 percent chapters are responsible for travel costs associated with the speaker. However, it is important to note that if the SHRM staff member in attendance is an FSD the chapter or state council is not required to cover travel expenses.

**Q: How should a chapter or state council proceed if it has already initiated planning for a conference that will conflict with the black-out period around the SHRM Annual Conference & Exposition date?**

A: The black-out period for the 2012 SHRM Annual Conference & Exposition is June 1-June 30. Please ensure that any events in future years are not planned during the month of June. Please note that during the black-out period, no e-blasts will be sent on behalf of the chapter or state council by SHRM regardless of the reason.

**Q: Does the black-out period for events around the SHRM Annual Conference & Exposition apply to a chapter's monthly educational meetings that exceed 200 attendees?**

A: No. The black-out period (June 1-June 30) does not apply to a chapter's monthly meeting attendance. It is only applicable to chapter conferences or major chapter educational events such as half- or full-day workshops or seminars. *(Please note that no e-blasts for these events will be sent during the black-out period.)*

**Q: Why is SHRM interested in our chapter/state council finances?**

A: The charter signed by each chapter and state council requires that each affiliate submit a financial statement to SHRM annually. The request for limited information in the SHAPE Year-End Report will substitute for the full financial statement. It provides standardization so that SHRM is receiving the pertinent information in a consistent format from each of our affiliates.

Please note that SHRM reserves the right to request a copy of your chapter's/state council's full financial statement to validate the information provided.

**Q: Is it okay that we have an individual logo in addition to using the SHRM "AFFILIATE OF" logo? Also, if we revise our logo, does it have to be approved by SHRM?**

A: Yes, it is okay for a chapter or state council to have its own logo, and we encourage you to use it in addition to the SHRM "AFFILIATE OF " logo. If you decide to revise your logo, please forward a draft copy to your FSD for review to ensure it is in compliance with SHRM's requirements.

**Q: Do we need to display the SHRM logo on EACH page of our web site?**

A: No, this is not required. The requirement is that the correct SHRM “AFFILIATE OF” logo be prominently displayed on your web site. Prominently means the “front” page preferably “above the fold.” We ask that you review every page of the web site to ensure that the current SHRM “AFFILIATE OF” logo, if displayed, is done so correctly. Please refer to the *Graphics Standards Manual for Affiliates* on the VLRC for further information regarding logo usage.

**Q: If we have the SHRM hosted web site, is the logo already correct throughout?**

A: Yes, the SHRM “AFFILIATE OF” logo displayed on the front page of SHRM-hosted web sites is already correct. You only need to check all of your chapter pages to ensure that the correct SHRM “AFFILIATE OF” logo is present if you have added it to other pages.

**Q: Is a chapter required to hold monthly chapter board meetings or are only four required?**

A: Chapters are required to hold a minimum of four chapter programming events and four chapter board meetings during the calendar year 2012. If the chapter wants to hold monthly meetings/programs, for example, we encourage and support it.

**Q: If our chapter president is not available to attend a state council meeting, can our chapter send a replacement to meet the requirements for the Gold and Platinum Award levels?**

A: If your chapter president is unable to attend a state council meeting, another chapter board member may be appointed to represent the chapter at the meeting (whether in person or on a conference call).

**Q: Can the annual planning, transition and leadership succession meetings be combined into an extended board meeting?**

A: Absolutely. We encourage chapters and state councils to complete the goals of conducting annual planning, leadership transition and succession planning meetings in a time efficient manner in whatever way best works for you.

## **SECTION 2: Community-Based Chapter/State-Focused Council Initiatives**

**Q: What is considered a Community-Based/State-Focused “initiative”?**

A: An “initiative” can be the continuation of an existing or ongoing effort, or implementation of a new project. The initiative can be as big or as small as the chapter or state council determines it to be; however, the project should be substantive, with defined objectives and measurable outcomes. See the Idea Center available on the VLRC for other creative ways to meet this goal. (<http://www.shrm.org/Communities/VolunteerResources/Pages/AffiliateSuccessfulPractices.aspx>)

In 2012, we allow up to 2 initiatives in any category. Remember, at least one initiative must be in the Membership category.

### SECTION 3: SHRM Affiliate Engagement

**Q: Will provision of shared space for SHRM and the state council meet the requirement for prime booth space for the SHRM staff?**

A: Yes, if it is in a prime traffic area of your marketplace. We encourage coordination of the SHRM and state council booth spaces next to one another to facilitate the opportunity to promote memberships between the two organizations (i.e., At-Large and Local Members Only).

**Q: Is there flexibility with the 15-minute requirement for SHRM staff podium time at a chapter-sponsored event where attendance is 200 or more?**

A: The presentation that SHRM staff will make during their allotted podium time will provide attendees an update on what SHRM is focusing on as well as highlight the benefits of SHRM and local chapter membership. We believe this time is well spent and will better connect your attendees to their national and local professional associations. To ensure the SHRM staff has adequate opportunity to cover this important information, we respectfully request as close to 15-minutes as possible, but we will work with you to meet our common goals.

**Q: Is there a minimum contribution level to the SHRM Foundation required?**

A: Contributions to the SHRM Foundation are not subject to a minimum until you reach the Platinum Award level. In Section 3, chapters and state councils will report the amount of their contribution. To qualify for the Gold Award level, you need to be a Chapter/State Council Champion, which has three requirements:

- 1) Make a monetary contribution to the SHRM Foundation from the chapter/state council's funds;
- 2) Conduct a Chapter/State Council Leadership Campaign (encourage board members to make individual donations of at least \$25 each with a goal of 100 percent participation); and,
- 3) Do one or both of the following:
  - a. Increase by 10 percent or more the chapter/state council's contribution to the SHRM Foundation over the 2011 contribution
  - b. Hold at least one special event (e.g. silent auction, golf tournament, etc.) to benefit the SHRM Foundation.)

For the Platinum Award level, chapters and state councils would again need to be Chapter/State Council Champions. However, at this level, all chapter/state council board members are required to make a minimum \$25 individual donation and 100 percent participation. The chapter/state council board is defined in your chapter/state council bylaws.

## SECTION 4: Measures of Success

**Q: Our chapter has only been able to achieve one of the lower levels of awards. What can we do to get a higher level of award?**

A: You will be pleased to hear that we have made achieving higher levels of awards easier by reducing the number of initiatives in Section 2 and providing more flexibility to allow you to do up to two initiatives in any area. Also, we eliminated or reduced items in all of the awards levels. For example, we no longer require chapters to be 100 percent chapters to qualify for the Platinum Award level. Only 100 percent of board members must be SHRM members. Also, flexibility has been built into who must attend the SHRM Leadership Conference. We feel that these changes will increase the possibility of achieving one of the higher levels of awards.

**Q: If our chapter president or president-elect is not available to attend the SHRM Leadership Conference, can we send a replacement?**

A: Sending another board member is an option at the Bronze and Silver Award levels. For Gold and Platinum Award levels, we require attendance by either the chapter president or president-elect.

**Q: If both the president and president-elect attend the SHRM Leadership Conference in November, will SHRM cover the cost of the conference registration and hotel accommodations for both?**

A: Registration and hotel accommodations are complimentary for the chapter president or the president-elect. The state council and/or local chapter have the option of covering the registration and travel expense for additional leaders. Educating our future leaders ensures a strong succession plan and smooth transition of leadership from one year to the next. If only one representative from the chapter can attend, we recommend the president-elect attend, as this will ensure that he/she is prepared to take on the role as chapter president. We have eliminated the requirement to send both the president and the president-elect for Platinum Award level.

**Q: Does the Membership Star requirement at the Gold Award level and Membership Superstar requirement at the Platinum Award level apply to 100 percent chapters?**

A: For Membership Star and Superstar status, the award requirements are based on the increase in SHRM chapter membership, so it applies the same to 100 percent chapters and non-100 percent chapters.

**Q: Is it true that if our chapter is not 100 percent SHRM, we will not be eligible to receive a Platinum Award?**

A: That was true in 2011 but has changed with the 2012 SHAPE. The Platinum Award requires that 100 percent of the chapter board be SHRM members only. There are other requirements that must also be met.

The Platinum Award level for state councils has also changed to remove the requirement that the state create a statewide initiative to transition non-100 percent chapters to 100 percent status.

**Q: Who is responsible for tracking chapter attendance at state council meetings for the purposes of meeting the SHAPE attendance requirements?**

A: The state council will determine how to measure, monitor and award credit for individual council member attendance at council meetings. The council is responsible for tracking the attendance. Sample tracking documents are available in the VLRC.

**Q: Our state council holds a variety of meetings throughout the year in addition to our full state council meetings, which are held quarterly. Do the chapter attendance requirements in SHAPE include all of these meetings?**

A: No. Chapter attendance percentages are based on full state council meetings only. Special meetings (such as state conference planning, core leadership area or district director meetings) are not included for the purposes of this calculation.

**Q: One of the requirements for Gold and Platinum Award status is to serve as a resource to the community or local media on HR issues. How can we meet the requirement if our employers do not allow anyone to speak directly to the media?**

A: There are many ways to do this without violating your employers' policies. This can include a chapter member serving on other non-profit community groups as an official representative of the chapter, or writing an article on an HR issue in your local paper or mentoring students. See the Idea Center available on the VLRC for other creative ways to meet this goal. (<http://www.shrm.org/Communities/VolunteerResources/Pages/AffiliateSuccessfulPractices.aspx>)

**Q: Our chapter board operates on a calendar year. In order to qualify for Platinum Award status, the president or president-elect must attend the Leadership Conference. Is this the president or president-elect for 2012 or for 2013?**

A: Educating our future leaders ensures a strong succession plan and smooth transition of leadership from one year to the next. If the chapter's goal is to achieve either the Gold or Platinum Award level in 2012, the chapter must be represented by its current year's (2012) president or the incoming president (president-elect for 2013). To meet this goal, chapters may need to adjust their board officer election cycle so that key leadership positions are named within sufficient time to make travel arrangements prior to the Leadership Conference held in November.

**Q: Will SHRM still provide chapters and state councils with financial support?**

A: The Chapter Financial Support Payment (CFSP) and State Council Financial Support Payment (SCFSP) programs, which are based on SHRM membership in chapters or in the state, will continue through 2012. However, SHRM continues to reserve the right to modify these programs as needed in the future.