

# Frequently Ask Questions

## SHRM Affiliate Program for Excellence for 2011 (SHAPE)

### **Q: What is SHAPE?**

A: SHAPE is an acronym for the SHRM Affiliate Program for Excellence. It 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: When did the SHAPE program take effect?**

A: This program took effect on January 1, 2010.

### **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. We hope you will download the appropriate workbook and review it with your chapter or state council board in more detail. This is a great tool to get your strategic plan started early. The workbooks are available in 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) Mission-Driven Chapter Initiatives; 3) SHRM Affiliate Support and 4) Measures of Success. The workbooks also include several appendices that provide resources and tools, an idea center to get those "creative juices" flowing and a sample year-end report.

### **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 Volunteer Leader's Resource Center (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". Go to [www.shrm.org/vlrc](http://www.shrm.org/vlrc). All of the details covered by the facilitators in our informational webinars can be found in the workbook.

## 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 2011, the chapter due date is January 31, 2012. For state councils, the due date for the 2011 SHAPE Year-End Report is March 31, 2012.

SHAPE measurements are for the calendar year January 1 through December 31, 2011.

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 (FSD's) 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 Field Services Director early in your planning process. In the event that the Field Services Director 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 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% 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% 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 a Field Services Director, the chapter or state council is not required to cover travel expenses.

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

A: The black-out period for the 2011 SHRM Annual Conference is June 1-June 30. We understand that some events are planned years in advance and the dates may have been

contracted prior to the institution of the black-out period. These, of course, are out of your control. This may have been the case with 2011 dates. If you are planning your 2012 events, please refrain from booking dates inside the June black-out period. Please note that during the black-out period, no e-blasts to market the chapter's event will be sent on behalf of the chapter by SHRM regardless of the size of the event.

**Q: Does the black-out period for events around the SHRM Annual Conference 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.

**Q: Why is SHRM interested in our chapter/state council assets? Is this new?**

A: No, this is not new. The charter signed by each chapter and state council requires that each affiliate submit financials to SHRM annually. The SHAPE Year-End Report provides standardization so that we are 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 conjunction with the SHRM "AFFILIATE OF" logo. If you decide to revise your logo, please forward a draft copy to your Field Services Director 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 website?**

A: No, we do not require this. The requirement is that the correct SHRM "AFFILIATE OF" logo be prominently displayed on your website. Prominently means the "front" page preferably "above the fold". We ask that you review every page of the website 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 website, is the logo already correct throughout?**

A: Yes, the SHRM "AFFILIATE OF" logo displayed on the front page of SHRM-hosted websites 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: Does a chapter have 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 2011. 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). However, the appointed representative may not already serve on the state council in another role unless that individual also serves on the chapter board.

## SECTION 2: Mission-Driven Chapter Initiatives

**Q: What is considered a chapter “initiative”?**

A: An “initiative” can be the continuation of an existing or ongoing chapter effort, or implementation of a new project. The initiative can be as big or as small as the chapter determines it to be; however, the project should be substantive, with defined objectives and measurable outcomes.

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

A: Absolutely. We encourage chapters and state councils to complete the goals of conducting annual planning and leadership transition meetings in a time efficient manner by combining several of them into one day.

## SECTION 3: SHRM Affiliate Support

**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 Member 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. 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 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 2009 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 Champions. However, at this level, all board/council members are required to make an individual donation for 100% participation.

#### SECTION 4: Measures of Success

**Q: Will chapters be able to earn Honorable Mention, Merit or Superior Merit status, and will state councils be able to earn Honor State Council and Superior Honor State Council status, under SHAPE?**

A: With the design of the SHAPE program, a new affiliate recognition system was implemented to better reflect the SHAPE requirements. Now called the "SHRM Excel Awards," there are four levels of recognition: Bronze, Silver, Gold and Platinum. This recognition system raises the bar of excellence for affiliates, and provides a tiered recognition system. The SHAPE planning workbooks describe the requirements to achieve each level in Section 4: Measures of Success.

**Q: Our chapter had achieved Superior Merit status for many years under the former Chapter Merit Award Program and expects to meet those requirements into the future. However, it looks like initially we may only be able to achieve Silver status because we are struggling to increase our SHRM membership. What can we do and how should this be communicated to our membership?**

A: We understand that achieving the Gold and Platinum Award levels will be challenging for many chapters. Through the Excel Awards, we created an entirely new system of recognition with new names and levels so that there would be no comparison to the previous recognition

system. It's great to achieve Silver level and it may take some focus, effort and time to get to the next level. There are many tools and resources available to help chapters grow their membership. Please talk with your Field Services Director for assistance. Communication to your membership should emphasize that this is a new program with different levels of awards and should not be compared with the previous award system.

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

A: As these events are designed to ensure the proper orientation and transition of the leadership of the chapter, this requirement applies only to the Chapter President or President-elect. Substitutions by other members of the chapter are not permitted.

**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

**Q: Does the Membership Star requirement at the Gold level and Membership Superstar requirement at the Platinum level apply to 100% 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 cannot receive a Platinum Excel Award?**

A: Yes, this category of award is reserved for those chapters that require SHRM membership to be a local member, and as a result, have achieved 100% SHRM member status. There are other requirements that must also be met.

The Platinum Award provides an additional level of recognition to the former three-tier chapter award system, and was added to recognize those chapters which truly go "above and beyond" in terms of their support and engagement of SHRM as an affiliated entity.

With that same philosophy in mind, the Platinum Award level for state councils limits eligibility to those states that create a statewide **initiative** to transition non-100 percent chapters to 100 percent status. If your state is a 100 percent state, you've met this requirement.

**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, CLA 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 Appendix B in the Planning workbooks for other creative ways to meet this goal.

**Q: Our chapter board operates on a calendar year. In order to qualify for Platinum Award status, both the President and President-Elect must attend the Leadership Conference. Is this the President and President-Elect for 2011 or for 2012?**

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 Gold or Platinum Award level in 2011, the chapter must be represented by its current year's (2011) President and incoming President (President-Elect) (2012). 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. Suggestion: Your chapter succession plan could dictate who will attend the Leadership Conference.

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

A: The CFSP and SCFSP programs, which are based on SHRM membership in chapters or in the state, will continue through 2011. . However, SHRM continues to reserve the right to modify these programs as needed in the future.