



Chapter Operations Management Tool 2023–24 Guidance

Contents

Overview	2
Section 1: Reporting Requirements	4
Q1: Upload your Annual Operational Plan (SOG)	4
Q2: Upload your Annual Leadership Report (SOG)	4
Q3: Upload your Annual Financial Report (SOG)	4
Section 2: Operational Requirements	5
Q4: Did your chapter nominate and elect chapter officers and Advisory Group members according to chapter bylaws (SOG)...	5
Q5: Required chapter website updates and other communication practices (SOG)	5
Q6: How many regional operating committee meetings did your chapter president or proxy attend this year (SOG)	6
Section 3: Member Value Requirements	7
Q7: Our leadership team met at least six times this year and other leadership team development practices (SOG)	7
Q8: Our chapter supported ASSP in advancing the mission and strategic areas of focus for the organization. (SOG)	8
Q9: Chapter Meeting Tracker and related practices (SOG)	9
Section 4: Additional Member Value Activities	10
Q10: What actions does your chapter take to help members take advantage of career / personal development opportunities .	10
Q11: What actions does your chapter take to help members develop leadership skills	11
Q12: What actions does your chapter take to help members attain certifications and earn CEUs	11
Q13: What actions does your chapter take to help members expand their local network of safety professionals	12
Q14: What actions does your chapter take to help members expand their technical knowledge	13
Q15: What additional actions does your chapter take to provide value to members	13





Overview

Our Chapter Operations Management Tool (COMT) is a tool to help you plan your chapter's annual activities, track performance throughout the year, and share your successes and challenges with the Society as you deliver the shared chapter value to members:

ASSP chapter communities provide accessible, face-to-face opportunities for ASSP Members to become *better* safety professionals.

The tool also serves as the primary record-keeping mechanism for the chapter recognition program, which celebrates the outstanding work of ASSP chapters each year. Each response option is assigned a certain point value that reflects how well the activity supports a chapter's ability to meet chapter charter requirements while providing value to members.

Bronze:	6000 - 6999 points
Silver:	7000 - 7999 points
Gold:	8000 - 8999 points
Platinum:	9000 points and above

Note: Chapters must complete all 400 point [chapter charter requirements](#) to qualify for any recognition level.

This document provides guidance as you plan and report your chapter's activities each year. In addition, you can use this document to facilitate conversations with your RVP, Area Director, and Chapter Services about the direction and operations of your chapter.

Clarifications and examples are included for each question. In addition, there are a few **general guides** to consider as you complete the Chapter Operations Management Tool:

- Most questions in the tool have several pre-determined response options. These responses come from the insights and best practices shared by chapter leaders of practices that reflect healthy chapter activities and operations. These responses are listed in order of how well they support your chapter in meeting chapter charter requirements to help you focus on the suggestions that provide the most value to your chapter's members.
- The activities you report should reflect coordinated efforts of the chapter and not the individual efforts of chapter members. For example, when thinking about membership recruitment work, a chapter initiative such as a Board member challenge qualifies. The work of an individual Board member who enjoys recruiting new members would not qualify (note: that person's efforts can be recognized through our Member-Get-A-Member campaign).





- Each activity should only be counted for one question in the tool.
- At the same time, larger events often have many components that impact many areas of a chapter's work. Still only list the event as a whole in one, primary category. For example, organizing a professional development conference primarily supports members' increasing their technical knowledge (question 14). You may also consider listing particular elements of your conference in other areas. For example, including a jobs fair or career panel helps members take advantage of career development (question 10). When breaking down the elements of a larger event, be descriptive of the differences involved.
- Consider each pre-determined response option as an "any or all" response. That is, if your chapter holds regular meetings in a satellite location where a number of your members are located (question 9) only mark yes to the third option regardless of the number of satellite locations you hold meetings in. That is, *do not* mark the box for a northern meeting and also mark "other" for an eastern meeting.
- Most questions provide the opportunity to select "other" and describe an activity that is not listed as one of the response options to the question. Items listed under "other" must be materially different from either the pre-determined responses or additional "other" listings in any question in the tool.

For additional questions or clarifications, please contact your Regional Vice President, Area Director, or [Chapter Services](#).

Thank you for sharing your passion with ASSP and providing your chapter members with accessible, face-to-face opportunities to become better safety professionals.





Section 1: Reporting Requirements

Reporting requirements verify that your chapter is providing value to members and serve as a way to provide feedback about the tools and resources your chapter needs to continue to provide that value. You will upload the requested report for each question. To receive the recognition points associated with each report, you must mark the box to confirm your upload.

1. Upload your 2023-24 Chapter Operational Plan. Due August 15, 2023. (SOG)

Note: Your chapter may use the [Annual Chapter Operations Planning Template](#) or develop its own template for this report.

Confirm (400 pts.)

2. Upload your 2024-2025 Annual Chapter Leadership Report. Due May 31, 2024. (SOG)

Note: This should include all leaders for the 2024-25 year. Access this form from the My Groups tab in your account profile on the ASSP website. [Details.](#)

Confirm (400 pts.)

3. Upload your chapter's Annual Financial Report. Due May 31, 2024. (SOG)

Note: Download the Chapter Annual Financial Report template from the [Chapter Financials](#) section of Community Leader Resources. Forms are listed by program year. Use the correct form for the year you need to report. This is required for all chapters US/Global.

Confirm (400 pts.)

- **Please enter your total revenue and expense from your financial report.**

IRS Tax Return Reminder: For chapters operating in the United States: After we receive your financial report, our Chapter Services team will calculate your three-year average gross revenue. If your chapter's three-year gross revenue average is under \$50,000, we will file your IRS 990 on your behalf. We will notify chapters with three-year gross revenue average over \$50,000 and these chapters must file their own tax returns.





Section 2: Operational Requirements

Operational activity requirements focus on the basic operational elements that enable chapters to deliver value to members responsibly.

4. **Did your chapter nominate and elect chapter officers and Advisory Group members according to chapter bylaws. (SOG)**

- Yes (400 pts.)

Note: Chapter bylaws should be reviewed regarding timing of nominations; posting slate and open voting. A copy of your chapter's current bylaws can be downloaded from the [Chapter Bylaws](#) page in Community Leader Resources for your reference.

5. **Required Chapter Website Updates – You are required to review your website quarterly (SOG)**

Note: Your chapter website is your primary means to communicate with both your current members and individuals interested in becoming members of your chapter or attending your events. It is important to keep your website up-to-date with fresh content added on at least a quarterly basis.

■ **What other actions does your chapter take to ensure your website provides up-to-date information to members and guests?**

- Have a designated volunteer(s) responsible for ensuring our website is up to date (90 pts.)
- Maintain its website with monthly content updates (90 pts.)
- Remove and/or archive files, new stories and other content on our website that were over 1 year old (90 pts.)
- Leverage training and other resources available through ASSP (40 pts)
- Other (40 pts.)
- Other (40 pts.)

Note: "Other" responses may include any or all of, but are not limited to, the following:

- Officer page has officer photos and contact information
- Utilize website training resources from ASSP
- Include member highlights on the website

■ **What other practices does your chapter follow when communicating with members?**

- Send communications to our members on a consistent schedule (90 pts.)
- Chapter communications contain a mix of chapter, Society and OSH news and content (40 pts)





- Have designated volunteer(s) responsible for developing and distributing communications (40 pts.)
- Our chapter uses a new roster every time we contact members (check this box if you contact members through your Real Magnet account provided by ASSP) (40 pts.)
- Use social media (chapter Facebook page, Twitter, LinkedIn, WhatsApp, Telegram, etc.) to connect with members (40 pts.)
- Other (40 pts.)
- Other (40 pts.)

Note: “Other” responses may include any or all of, but are not limited to, the following:

- Electronic communications (email, social media posts, etc.) link to a news item on our website
- Utilize chapter’s Real Magnet or another CAN-SPAM compliant email service
- Utilize email accounts hosted by ASSP
- Utilize the e-communication training resources from ASSP
- Send meeting reminders (1-2 weeks before, 1 day before, etc.).
- Call members to invite them to events or to provide additional information about the chapter.
- Direct mailing to members with information about the chapter or upcoming chapter events.
- Provide printed materials with chapter information at chapter meetings and events.
- Provide a confirmation message when members register for chapter meetings and events. (Event Espresso, the online registration included in your webhosting package from ASSP, has the capability to automatically send confirmation messages that you can customize.)

6. **How many regional operating committee (ROC) meetings did your chapter president or proxy attend this year? (SOG)**

- 1 (400 pts)
- At least 1 additional ROC {total of 2 or more} (90 pts.)

Note: The Chapter President, or that person’s proxy, is required to attend at least one ROC meeting each program year. Your chapter can earn additional points by having a representative at more than one ROC during the year. Virtual attendance may qualify where necessary and with approval from your RVP.

Regional operating committee meetings are opportunities for you to provide input into the decisions made for your region. In addition, these meetings often provide additional training and information to you to be a more successful leader in your ASSP community. You, your chapter, and your chapter’s membership benefit from having a representative at these meetings.

Section 3: Member Value Requirements





Member value requirements focus on the value that chapters provide to members through engaging programming and experiences.

7. **Our leadership team met at least six times this year and at least one of those meetings was for strategic planning. (SOG)**

- Yes (400 pts)

What actions does your leadership team take to improve their ability to serve members?

- All our chapter leaders take their on-demand leadership position training from ASSP. (90 pts.)
- All our incoming leaders participated in individual training or transition meetings with outgoing leaders. (90 pts.)
- Discuss the results of all chapter member surveys as a leadership team (90 pts.)
- Distribute and review a duty checklist for all incoming chapter leaders (90 pts.)
- Members of our leadership team attended one or more Leadership Conference or related events from ASSP. (90 pts.)
- The leaders who attended the leadership conference or related events share information during one of our chapter meetings. (90 pts.)
- Participate in training at ROC meetings (90 pts.)

What additional actions does your leadership team take to improve their ability to serve members?

- Discuss important dates and news from the monthly leader updates. (40 pts)
- Gather best practices from other ASSP leaders (from Region VP, area director, chapters, practice specialties, common interest groups or the ASSP Community) (40 pts.)
- Use the leadership transition tools in Community Leader Resources (40 pts.)
- Other (40 pts.)
- Other (40 pts.)

Note: "Other" responses may include any or all of, but are not limited to, the following:

- Share best practices with another ASSP community (chapter, common interest group or practice specialty)
- Take other online leadership trainings
- Hold an installation ceremony for incoming leaders
- Participate in virtual or in-person training provided by your AD or RVP
- Attend a leadership training organized by an organization other than ASSP and sharing the learning outcomes with the other leaders
- Host trainings for those interested in chapter leadership before they run for elected office





- Establish a mentoring relationship between past leaders and new leaders that continues throughout the program year.
- Send additional leaders (beyond the minimum requirements) and/or emerging leaders to AOC / ROC meetings.
- Leverage ASSP leadership and staff for specific trainings (ex. working with your RVP or AD to improve chapter operations).
- Establish a cross-training program among leaders to help everyone understand roles, responsibilities, and growth potential.
- Establish a mid-year training review for chapter leaders and/or other volunteers.
- Hold elections earlier than required in order to provide opportunities for job shadowing with and training from existing leaders.
- Participate in a regional transition training call or webinar.
- Follow up with new leaders after 60-90 days to check-in on the transition and review information as needed.

8. **Our chapter supported ASSP in advancing the mission and strategic areas of focus for the organization. (SOG)**

- Yes (400 pts.)

What ways does your chapter cooperate with Society in advancing the mission and strategic areas of focus for the organization?

- Leverage education resources (ex. Meeting facilitation guides, on-site trainings, etc.) (40 pts.)
- Partner with our region, another chapter, a common interest group and/or a practice specialty to create programming opportunities of value to members (40 pts.)
- Support a student scholarship or the ASSP Foundation (40 pts.)
- Other (40 pts.)
- Other (40 pts.)

Note: “Other” responses may include any or all of, but are not limited to, the following:

- Partner with another ASSP member community (chapter, common interest group or practice specialty)
- Support Safe + Sound Week
- Participate in career day(s) to promote safety in the local area
- Submit stories about upcoming chapter events and significant chapter and member accomplishments to our region webmaster, *Chapter Leader Update*, *Society Update*, *Professional Safety Journal* or other ASSP publications
- Collaborate with a section or student section that for which the chapter is not the parent chapter (keeping the section’s parent chapter informed)





- Represent ASSP at community events and conferences hosted by other organizations.
- Represent ASSP at local business's Safety Day programs.
- Cross-promoted programming throughout the region or with other regions

9. Chapter Meeting Tracker

Note: There is no form to upload for this question; instead, fill in the fields for the meeting month, the number of attendees, whether it was an educational meeting, the type of meeting it was (face-to-face, virtual, tour, etc.), and whether or not CEUs were offered in the meeting tracker within the COMT. Do your best to report your meetings throughout the year rather than trying to locate all the information at the end of the year.

Meeting 1 - 4 (400 pts. each - 4 meetings required, 2 of which must be face-to-face (SOG))

Meeting 5 – 6 (90 pts. each)

Meeting 7 – 12 (40 pts. each)

▪ What actions does your chapter take to host meetings?

- Distribute chapter meeting notices 3-4 weeks prior to the meeting date and include on our website {What/When/Where} (40 pts.)
- Hold regular meetings in a satellite location where a number of our members are located (40 pts.)
- Host programming specifically geared toward young professionals, members in a specific industry and/or student members (40 pts.)
- Host hybrid meetings to increase accessibility (40 pts.)
- Offer on-line register through website for chapter members and guests to RSVP and/or pay for chapter events (40 pts.)
- Other (40 pts.)
- Other (40 pts.)

Note: “Other” responses may include any or all of, but are not limited to, the following:

- Host meetings geared toward members in a specific industry that are separate from our regular chapter meetings
- Send meeting follow-up messages to attendees, thanking for attending and providing meeting resources





Section 4: Additional Member Value Activities

Additional member value activities reflect the work your chapter does to extend the value that your chapter provides to members through engaging programming and experiences.

10. **What actions does your chapter take to help members take advantage of career / personal development opportunities?**

- Post local employment opportunities in our newsletter, website, and/or social media and/or refer employers and members to the ASSP Job Board. (90 pts.)
- Promote local employment opportunities at chapter meetings / events (90 pts.)
- Encourage great speakers to submit an article to PSJ. (40 pts.)
- Recognize members for their service to ASSP and achievements, including long service recognition, in our newsletter, website, and/or social media (40 pts.)
- Other (40 pts.)
- Other (40 pts.)

Note: “Other” responses may include any or all of, but are not limited to, the following:

- Refer local employers to post jobs on the ASSP Job Board
- Refer local chapter members to post resumes on the ASSP Job Board
- Award long service recognition awards at our chapter meetings
- Recognize members for their service to ASSP and achievements at chapter meetings
- Award a Chapter Safety Professional of the Year
- Nominate a member for a Regional Safety Professional of the Year award
- Nominate a member for a Society award (Honor of Fellow, Outstanding Safety Educator, Safety Professional of the Year, etc.)
- Send a letter to members’ employer recognizing member and thanking the employer for their support
- Appoint a Jobs Chair to manage chapter jobs boards and postings and to facilitate connections between job seekers and employers
- Promote the chapter’s jobs board through other ASSP communities, the Region, and/or local staffing companies
- Include career development sessions at chapter meetings, PDCs, or other events (ex. feedback on resumes from recruiters, mock interviews, career panels, etc.)
- Incorporate a regular jobs announcement portion in chapter meetings, newsletters, email blasts, social media accounts, and other chapter communication outlets for members to share open positions they are aware of
- Develop a mentoring program for student section members, young professionals in the chapter, or professionals new to safety with the focus on current members providing career guidance to their mentees





- Develop an internship program for student section members, young professional members, or professionals new to safety with the focus on current members providing internship opportunities with their companies
- Host a specific career-focused meeting where members can talk with recruiters, receive resume feedback, participate in mock interviews, and/or hear from panelists about their careers

11. **What actions does your chapter take to help members develop leadership skills?**

- Provide small roles for potential leaders to get involved with (for example, greeters at meetings or helping with the registration desk) (90 pts.)
- One or more potential leaders, not currently serving as a leader attends the ASSP's Leadership Conference (40 pts.)
- Share best practices with other ASSP leaders (chapters, practice specialties, common interest groups or the ASSP Community) (40 pts.)
- Use the succession planning tools in Community Leader Resources to identify and engage potential chapter leaders (40 pts.)
- Other (40 pts.)
- Other (40 pts.)

Note: "Other" responses may include any or all of, but are not limited to, the following:

- Keep a log of members who may be good volunteers
- Contact chapter members that have shown leadership potential to inquire about their interest in Executive Board participation
- Provide smaller volunteer opportunities to chapter members that have shown leadership potential
- Invite members to attend board meetings to learn about the roles and work involved
- Create job shadowing opportunities for potential leaders
- Have potential leaders go through [ASSP Leadership On-demand training](#)

12. **What actions does your chapter take to help members attain certifications and earn CEUs?**

- Offer CEUs at our events (90 pts.)
- Offer certification study groups (40 pts.)
- Other (40 pts.)
- Other (40 pts.)

Note: "Other" responses may include any or all of, but are not limited to, the following:

- Survey members on certification goals and needs





13. **What actions does your chapter take to help members expand their local network of safety professionals?**

- Exhibit at or attend local safety events to promote the chapter & ASSP to potential members (40 pts.)
- Leverage handout materials from ASSP for meetings/events (40 pts)
- Leverage the Society's annual Member-Get-A-Member campaign to recruit new members (40 pts.)
- Other (40 pts.)
- Other (40 pts.)

Note: “Other” responses may include any or all of, but are not limited to, the following:

- Contact local businesses in the area to recruit new members
- Collaborate with the Chamber of Commerce (or comparable organization) to make connections with local contacts
- Contact expired members and/or members (phone call, email, social media, etc.) that have entered their grace period about renewing their membership
- Provide one free meeting registration to new or prospective members
- Host a social or networking event just for new members or designed for current members to provide a welcome to new members
- Make personal introductions between a new member and an existing member during the networking portion of a meeting to facilitate relationship building
- Send a personalized invitation to new members to connect with your chapter on social media (chapter Facebook page, Twitter, LinkedIn, WhatsApp, Telegram, etc.)
- Send welcome messages to recent graduates who have become full members of the chapter
- Set up a chapter recruitment campaign or participating in a regional recruitment campaign with a promo code from [Chapter Services](#)
- Host recruitment events in partnership with other ASSP communities (another chapter, a Practice Specialty, or a Common Interest Group)
- Maintain a list of non-members who attend meetings and inviting those guests to become members through chapter communications (newsletters, social media, website information, etc.) or direct contact (direct mailings, emails, and/or phone calls)
- Host a bring-a-friend meeting, social event, or campaign that encourages current Executive Committee and/or chapter members to introduce colleagues to the chapter and ASSP
- Involve the chapter's student section in a call-list program to recruit new members to the chapter and help the students learn more about the benefits of full membership for when they graduate
- Offer incentives for new members (ex. free first meeting, gift certificates, chapter or ASSP merchandise, etc.)
- Host special networking, social, or outreach events with the primary focus of recruiting new members





- Invite representatives of other safety organizations or coalitions in your area to attend chapter meetings to introduce them to the benefits of membership
- Provide membership information on the chapter's website, including benefits of chapter membership, benefits from Society, and links to the on-line membership application
- Provide special outreach to the chapter's student section members or students at local colleges and universities to promote the benefits of student membership (current students) and full membership (graduating students)
- Establish a young professionals group to encourage young professionals to maintain their membership

14. **What actions does your chapter take to help members expand their technical knowledge?**

- Leverage technology to connect remote / virtual audiences to meetings (90 pts.)
- Other (40 pts.)
- Other (40 pts.)

Note: "Other" responses may include any or all of, but are not limited to, the following:

- Collaborate across Society to source speakers (chapters, common interest groups, practice specialties, region, ASSP Community, etc.)
- Offer chapter members the opportunity to present at technical meetings based on their service and expertise

15. **What additional actions does your chapter take to provide value to members?**

- Conduct a member survey to determine member expectations (40 pts.)
- Conduct a post-meeting evaluation after each meeting (40 pts.)
- Personally greet members at meetings to create a welcoming environment (40 pts.)
- Send personalized e-mail invitations to meetings (40 pts.)
- Welcome new members with an e-mail, phone call, or personalized invitation to connect with the chapter on social media (40 pts.)
- Other (40 pts.)
- Other (40 pts.)

Note: "Other" responses may include any or all of, but are not limited to, the following:

- Share the results of member surveys with chapter members
- Offer a new member orientation
- Coordinate charitable community outreach that is meaningful to members
- Chapter leaders connect with new members on the ASSP Community
- Provide chapter and/or Society giveaways to new members, such as meeting calendar magnets, flash drives with chapter information, or pens, notepads, computer bags, or other logoed items





- Chapter leaders send periodic personal messages to members throughout the year (ex. we missed you at the last meeting, were you aware of this benefit, how did your recent interview go, good luck on your CSP exam, etc.)
- Host special recognition events, such as Member Appreciation Day, Past Presidents Dinner, Volunteer Appreciation Luncheon
- Create a chapter Hall of Fame or chapter award to recognize outstanding members chapter members
- Provide thank you gifts to volunteer leaders or guest speakers (ex. a plaque, a certificate of appreciation, a gift certificate, ASSP merchandise, free lunch, sponsoring membership fee, etc.)
- Send a personal thank you through the mail, email, social media, or a call
- Sponsor local safety initiatives with monetary or materials donations
- Invite local media to charitable events to raise the profile of ASSP and safety issues in the local community

