# **Assessment and Action Plan for a Successful Chapter**

**Policies and Procedures**   
A chapter’s policies and procedures (beyond the chapter bylaws and affiliation agreement) are at the foundation of every successful chapter. Sound policies and procedures ensure excellent operating practices. The following are some examples of what should be included in your policies and procedures document.

**Which of the following are included in your chapter’s policies and procedures document:**

* Governance guidelines (documented board roles, election procedures, formal committees, procedures for documenting meeting minutes, etc.)
* Financial guidelines (treasurer’s report procedures, budget timelines, travel expenses guidelines, payment approval processes, etc.)
* Event guidelines (event planning procedures, registration costs, sponsorship program information, policies on alcohol at events, etc.)
* Communications and Marketing guidelines (chapter email processes, guidelines for updating website, etc.)
* My chapter does not have policies and procedures documented.

**What else is included in your policies and procedures document?**

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**What actions will your chapter take (and by when) to improve its policies and procedures?**

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**What resources can you use to improve your chapter’s policies and procedures document?**

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**Financial Standing**A successful chapter demonstrates a history of good financial standing. The following actions are part of what demonstrates good financial practices.

**Which of the following reflect the financial practices of your chapter?**

* My chapter always submits its annual financial statement to the national office by August 31.
* My chapter creates a yearly budget.
* My chapter treasurer presents a treasurer’s report at every board meeting.
* My chapter has documented procedures for approving and processing payments.
* My chapter regularly conducts a financial review by two board members who do not have access to the financial accounts.

**What other financial practices does your chapter follow?**

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**What actions will your chapter take (and by when) to improve its financial practices and overall standing?**

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**What resources can you use to improve your chapter’s financial practices and overall standing?**

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**Chapter Website**A successful chapter’s website includes up-to-date information. The following information should be on your website and up to date.

**Which of the following relate to your chapter’s website?**

* My chapter’s website indicates that membership is open to everyone free of charge.
* My chapter’s website shares how to receive chapter updates.
* My chapter’s website includes a copy of the chapter bylaws.
* My chapter’s website lists the names and contact information of the board members.
* My chapter’s website has information on upcoming events.
* My chapter’s website has information on chapter sponsorship opportunities.
* My chapter’s website shares how to volunteer on a committee or the chapter board.

**What other elements make my chapter website great?**

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**What actions will your chapter take (and by when) to improve its website?**

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**What resources can you use to improve your chapter’s website?**

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**Engagement and Inclusion**A successful chapter engages with individuals in the chapter’s geographic area through a variety of channels. The following opportunities demonstrate a chapter’s commitment to engagement.

**In what ways did your chapter engage individuals in its chapter area?**

* My chapter hosted a face-to-face event last year.
* My chapter hosted a webinar or virtual event last year.
* My chapter’s community in CUPA-HR Connect is active.
* My chapter contacted new national CUPA-HR members in our chapter’s geographic area and shared information about the chapter.
* My chapter used the engagement lists provided by the national office to connect with individuals who are not active with our chapter.
* My chapter has a plan in place to engage potential volunteers and board members.
* My chapter welcomes and engages all levels of HR professionals.
* My chapter board is diverse and represents several institution types.

**In what other ways did your chapter engage individuals in its chapter area?**

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**What actions will your chapter take (and by when) to improve its engagement of individuals in its area?**

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**What resources can you use to improve your chapter’s engagement and inclusion efforts?**

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**Content Development**A successful chapter’s learning content should support CUPA-HR’s strategic priorities, core values and the learning framework. The following actions demonstrate support of these key items.

**In which of the following ways does my chapter’s learning content reflect CUPA-HR’s strategic priorities, core values and the learning framework?**

* My chapter begins to plan content for learning programs six months in advance
* My chapter reviews evaluations from previous events to plan content for future learning programs
* My chapter solicits presenters and subject matter experts by conducting a call for proposals
* My chapter provides learning content to enable excellence and success for higher ed HR professionals and their institutions
* My chapter provides content connected to the CUPA-HR Learning Framework
* My chapter provides content that relates to current legislative and regulatory issues
* My chapter provides content or creates conversations around HR research or data-driven HR.

**In what other ways does my chapter’s content development support CUPA-HR’s strategic priorities, core values and learning framework?**

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**What actions will your chapter take to improve its support of CUPA-HR’s strategic priorities, core values and learning framework through learning content?**

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**What resources can you use to improve your chapter’s support of CUPA-HR’s strategic priorities, core values and learning framework through learning content?**

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