

2017 LEADERSHIP DAY

MESHRM 2017 Leadership Day

- ▶ Conference welcome: Strategic HR Group
- ▶ Sponsor welcome: St. Joseph's College, Kris Avery/Stephanie Briggs
- ▶ Leadership welcome and introductions: MESHRM Director 2017-2018, Amie Parker
- ▶ Maine SHRM HR Awards: MESHRM Director-Elect 2017-2018, Barbara Lovejoy
- ▶ Successfully Recruiting and Engaging Volunteers: Field Services Director SHRM, Dan Griffiths
- ▶ Best of the Volunteer Leader Resource Center: Amie Parker
- ▶ MESHRM Initiative Updates: Amie Parker and Kris Avery
- ▶ Questions/Wrap-Up
 - ▶ How to get your HR credits
 - ▶ Leadership Day survey



Special thanks to our Leadership
Day sponsor!



2017 MESHRM HR Awards

MAINE HR CONVENTION | MAY 9, 2017



2017 HR Volunteer Leader of the Year



Jodie Griffith, PHR, SHRM-CP
HR Business Partner at InterMed P.A.

In recognition of her commitment and
dedication to the Best Places to Work
Program



2017 MESHRM Director's Award Recipient



Jennifer Harnish
Director of Human Resources at Baker
Newman Noyes

In recognition of her leadership and
commitment to her community and
the HR profession!



Best of the SHRM Volunteer Leader Resource Center (VLRC)

MAINE HR CONVENTION | MAY 9, 2017



SHRM's Volunteer Leader Resource Center

ADMINISTRATION ▾

COMMUNICATIONS ▾

MEMBERSHIP ▾

RESOURCES ▾

VOLUNTEER EXCHANGE ▾

Leadership Development

Chapter/State Council Development

Core Leadership Areas

Student Chapters

Keyword / Phrase



Chapter/State Council Development

IMPORTANT DATES

AFFILIATION PROCESS

AWARDS & SCHOLARSHIPS

EVENT MANAGEMENT

OPERATIONS

1 to 2 of 2 total

A-Z ▾

Chapter Activities Checklist by Month

A monthly checklist to assist in chapter operational planning. Each month, there are required (or date-sensitive) activities, recommended activities, and items for review. Check each month since there are certain deadlines and initiatives that happen ...

Deadlines for Chapters and State Councils

Items with specific dates (i.e. April 30, 2017) are valid this year only. January January 30, 2017 SHRM Foundations Talent Management Conference and Exposition Scholarship application deadline Each January 31 Section 1 of SHAPE docum

KEY RESOURCES:

[HTTPS://COMMUNITY.SHRM.ORG/VLRC/ADMINISTRATION/CHAPTER-STATE-COUNCIL-DEVELOPMENT](https://community.shrm.org/vlrc/administration/chapter-state-council-development)



SHRM Checklist of Chapter Activities by Month

SHRM is providing chapter presidents with this monthly checklist to help you in your planning. You will see that each month, there are required (or date-sensitive) activities, recommended activities, and items for review. If your organization is on a fiscal year, use January as your starting month, but also check each month since there are certain deadlines and initiatives that happen during specific months.

	Required	Recommended	Review
January	<ul style="list-style-type: none"> Hold planning meeting with new board using SHAPE planning workbook—be sure to include a succession planning discussion. Participate in your state leadership conference if one is held (required for SHAPE Award). Contact your State Council Director for more information. Complete the SHAPE chapter online form by 1/31—plan for at least two people to have the data to complete it on time in case one person is unavailable. Ensure that the chapter president is a member of SHRM throughout the year. If your bylaws require that other chapter board members are SHRM members, ensure that they remain SHRM members throughout the year. If you hold a chapter conference or any educational event for 200+ participants, invite your Field Services Director (FSD) to speak at a session; also offer your FSD 10-15 minutes of time at the podium to address the full group; FSD should have a prime/visible booth location if you have an exhibit hall. (Required in SHAPE.) Notify your FSD of key chapter events for the year, such as conferences, annual award ceremonies, strategic planning meetings, and any other events you might want SHRM staff to attend. If there have been any changes in your volunteers, report them to your Member Engagement Associate. Keep SHRM informed of any changes to e-mail addresses, contact information, and role changes as they occur. Promote the SHRM Certification program and encourage members to become certified. Set up or determine the feasibility of having a local study group or provide certification prep materials and available courses to your members. For January – November please submit Chapter Designation Forms by the 5th business day prior to the end of the month to be processed. 	<ul style="list-style-type: none"> Fill your volunteer leader positions, and/or solicit volunteers. Develop and communicate your chapter's short- and long-term goals. Provide the SHRM Fundamentals of Chapter Operations Manual to all volunteers. Hold new leader orientation/transition using the slides and workbook in the VLRC. Provide a volunteer job description to the board and your expectations for the year. Ask your membership chair to work with the state membership director to make sure they have a membership campaign scheduled and that volunteers are aware of the membership recruitment/retention resources available from SHRM. Use the "SHRM as a Resource" presentation to show your members the value of SHRM membership. This can be done at a member meeting or new member orientations. Mark your calendars for key events during the year, such as the Core Leadership Area (CLA) calls and webinars, state council meetings (chapter presidents should attend these meetings), state leadership events, SHRM Conference, etc. District directors should be reaching out to chapter presidents to provide a presentation on SHRM member benefits, help chapter with orientation and planning meetings, etc. Please be responsive to your State Council Director and District Director. Prepare an annual budget – it is recommended that you provide a budget for all of your committees/board members. Set up process for tracking member retention – refer to the Membership CLA section in the VLRC. Encourage your board and committee members to participate in SHRM Connect groups to share practices and ideas. All chapters have access to e-blasts to promote their activities to all SHRM members in the chapter's ZIP code range. Complete the appropriate online request form for your chapter's size in the VLRC. Use the quarterly rolling PowerPoint with updates from SHRM at your chapter meetings during networking time. Find the slides in the VLRC under "Communications." Submit your monthly program for recertification credits with the SHRM Certification Preferred Provider Program. 	<ul style="list-style-type: none"> Have all new committee chairs and board members review the resources/webinars on the VLRC. Ensure that board members carefully review and understand the chapter bylaws; consider changes as needed throughout the year. You can review SHRM's Bylaws Checklist and Model Bylaws. Review the chapter's c harter with your board (if you cannot locate this document, you can request it from your Member Engagement Associate at SHRM). Provide the Guide to Financial Management to treasurer and other key volunteers (all should review it). Be sure that you are receiving e-mails from SHRM Volunteer Communications; if you have ever opted-out of a SHRM e-mail, you might not receive important information about your volunteer role. Review Parliamentary Procedure resources. Have the chapter secretary review the following resources: Guide to Taking Minutes and Maintaining Your Chapter's History. The chapter president should review the online resources for running effective meetings. With your board, review the SHAPE initiatives each month to be sure you are on track for an award or to meet SHRM's requirements in Section 1 of the SHAPE.

KEY RESOURCES:

[HTTPS://COMMUNITY.SHRM.ORG/VLRC/ADMINISTRATION/CHAPTE
R-STATE-COUNCIL-DEVELOPMENT](https://community.shrm.org/vlrc/administration/chapter-state-council-development)



Excellent Webinar Resources for Incoming Boards to Review Upon Taking Office



Webinar Resources (20 minutes)

- [Alternative Chapter Structures](#) (for chapters considering adding
- Member Service Areas in nearby towns/cities)
- |

Webinar Resources (~1 hour)

- [Time Management](#)
- [Leadership Development](#)
- [Engaging and Motivating Volunteers](#)
- [Successful Programming](#)
- [Transitioning to a 100% Chapter](#)

- [Leveraging Technology - Part I: SHRM Connect](#)
- [Leveraging Technology - Part II: SHRM-Hosted Website Program](#)
- [Working with the Media](#)
- [Activating and Engaging Young Professionals](#)
- [Better Together: Alternate Chapter Structures](#) (a more detailed presentation than the one above for chapters considering adding

Member Service Areas in nearby towns/cities)

- [Express Yourself: Creating and Maintaining Your Brand](#)
- [Successful Practices in Succession Planning: A Panel Discussion](#)
- [Chapter Financial Management and Legal Issues for Chapters](#) | Handout: [SHRM Antitrust Compliance Policy](#)
- [Community Outreach Programs](#) | Presentation referenced: [Career Advancement & Education](#)

- [Engaging Chapter Members](#)



KEY RESOURCE | CHAPTER ACTIVITIES CHECKLIST BY MONTH

[HTTPS://COMMUNITY.SHRM.ORG/VLRC/ADMINISTRATION/CHAPTER-STATE-COUNCIL-DEVELOPMENT](https://community.shrm.org/vlrc/administration/chapter-state-council-development)



Easy and Free Program Ideas!

Need a “free” program? Did your speaker cancel at the last minute? Use the SHRM Foundation DVD series!

These educational DVDs present real-world case studies of strategic HR in action and are ideal for use in SHRM chapter programs. Use the companion discussion guides and PowerPoint presentations to create high-impact presentations for professional development or classroom use. SHRM Foundation DVDs are used in more than 400 universities in 43 countries. When used as part of a 1-hour educational session with the companion materials, these DVDs are approved for recertification credit, as noted below. Click on a title below to watch the video online or to learn more.

Investing in Older Workers

From Local to Regional to Global Player: The Evolution of Aramex International

Dollar General: Serving Others | Dollar General's Commitment to the Military Community

Ernst and Young: Creating a Culture of Flexibility

Doing Well by Doing Good: Global Sustainability at Aditya Birla Group

Once the Deal is Done: Making Mergers Work

Seeing Forward: Succession Planning at 3M

Trust Travels: The Starbucks Story

Ethics: The Fabric of Business

Fueling the Talent Engine: Finding and Keeping High Performers

HR in Alignment: The Link to Business Results

HR Role Models

World Economic Forum: Creating Global Leaders

Recertification Credit for SHRM Foundation DVDs

The majority of DVDs are eligible for one hour of HR recertification credit. To receive credit, they must be viewed as part of a 1-hour educational program using the companion discussion guide and PowerPoint presentation. (Watching the DVDs on your own does NOT qualify for credit.) The type of credit that will be awarded is noted [here](#). In order for your SHRM chapter to earn recertification credit for using these programs, you must submit the event through your respective certification provider account.

KEY RESOURCE | CHAPTER ACTIVITIES CHECKLIST BY MONTH

[HTTPS://COMMUNITY.SHRM.ORG/VLRC/ADMINISTRATION/CHAPTER-STATE-COUNCIL-DEVELOPMENT](https://community.shrm.org/vlrc/administration/chapter-state-council-development)



Tax Filings Due By May 15: Info Below from the IRS

IMPORTANT! Most small tax-exempt organizations whose annual [gross receipts](#) are [normally \\$50,000 or less](#) are required to electronically submit Form 990-N, also known as the e-Postcard, unless they choose to file a complete Form 990 or Form 990-EZ instead. If you do not file your e-Postcard on time, the IRS will send you a reminder notice. There is no penalty assessment for late filing the e-Postcard, but an organization that fails to file required e-Postcards (or information returns – Forms 990 or 990-EZ) for three consecutive years [will automatically lose its tax-exempt status](#). The revocation of the organization's tax-exempt status will not take place until the filing due date of the third year.

Due Date of the e-Postcard: The e-Postcard is due every year by the 15th day of the 5th month after the close of your [tax year](#). For example, if your tax year ended on December 31, the e-Postcard is due May 15 of the following year. If the due date falls on a Saturday, Sunday, or legal holiday, the due date is the next business day. You cannot file the e-Postcard until after your tax year ends.

How to File: Use [this link](#) to file the e-Postcard. If you have trouble accessing the system using that link, you may be able to access the filing site directly by typing or pasting the following address into your Internet browser: <http://epostcard.form990.org>. When you access the system, you will leave the IRS site and file the e-Postcard with the IRS through the Urban Institute. The form must be completed and filed electronically. There is no paper form.

Information You Will Need to File the e-Postcard: The e-Postcard is easy to complete. All you need is [eight items of basic information](#) about your organization.

Who Must File: Most small tax-exempt organizations with gross receipts that are normally \$50,000 or less must file the e-Postcard.

Additional Information:

- [Frequently Asked Questions - e-Postcard](#)
- [Frequently Asked Questions](#) - Automatic Revocation for Not Filing Annual Return or Notice
- [Annual Electronic Filing Requirement for Small Exempt Organizations](#)
- [EO Update:](#) Subscribe to Exempt Organization's regular email newsletter that highlights new information posted on the Charities and Non-Profits pages of IRS.gov.
- Account, tax law, or questions about filing the e-Postcard should be directed to Customer Account Services at 1-877-829-5500. For questions about or problems with the e-Postcard filing system, use the **Technical Support** link on the filing site.
- [Form 990-N and Form 990-EZ Filing Tips](#).

KEY RESOURCE | CHAPTER ACTIVITIES CHECKLIST BY MONTH

[HTTPS://COMMUNITY.SHRM.ORG/VLRC/ADMINISTRATION/CHAPTER-STATE-COUNCIL-DEVELOPMENT](https://community.shrm.org/vlrc/administration/chapter-state-council-development)



Examples of downloadable resources include:

- Creative programming ideas for your chapter meetings
- Hosting a SHRM speaker's bureau presenter
- Hosting a SHRM representative
- Registration and refund sample policies for your events
- SHRM Foundation DVD's for chapter programs
- Working with vendors, sponsors and advertisers

KEY RESOURCES | EVENT MANAGEMENT

[HTTPS://COMMUNITY.SHRM.ORG/VLRC/ADMINISTRATION/CHAPTER-STATE-COUNCIL-DEVELOPMENT/EVENT-MANAGEMENT](https://community.shrm.org/vlrc/administration/chapter-state-council-development/event-management)



SHRM Competency-Based Education for Chapters

06-13-2016

FIVE HABITS OF DESTRUCTIVE HR LEADERS

The first in a series of multi-media presentations that Chapters can use to help their members brush up on competencies from the SHRM HR Competency Model.

This presentation is intended to be 1.5 hours in length and features Alex Alonso, SHRM Senior VP, Knowledge Development, presenting the "Five Habits of Destructive HR Leaders."

Download the following materials to get started. (Chrome or Firefox suggested)

[Instructors Workbook](#)

Facilitator guide to assist with presenting the 1.5 hour workshop that mirrors the student workbook and contains additional information and guidance to facilitate discussion and activities. It is highly recommended the Instructor Workbook be downloaded and reviewed prior to the start of the workshop so there is general understanding of the instructional intent.

[Instructors PowerPoint](#)

Complete slide deck that follows the video presentation and may be used by the instructor to set the flow and pace of the workshop.

KEY RESOURCES | PRESENTATIONS AND WORKSHOPS

[HTTPS://COMMUNITY.SHRM.ORG/VLRC/RESOURCES-SHRM/VIEWVLRCARTICLE?DOCUMENTKEY=ED233DFB-5BDE-4CBC-AFC4-DC7A2A32256B](https://community.shrm.org/vlrc/resources-shrm/viewvlrcarticle?documentkey=ED233DFB-5BDE-4CBC-AFC4-DC7A2A32256B)



Branding/Marketing

BRANDING CENTER

E-BLAST REQUESTS

LOGOS

ANNUAL CONFERENCE MARKETING

1 to 7 of 7 total

A-Z

Affiliate PowerPoint Template for Chapter and State Council Use

Branding & Logo

Various formats of the affiliate of logo, your affiliate brand guideline and additional tips to effectively communicate your chapter brand and the relationship between you and SHRM. There is also a power point to better understand branding as a concept and how using the SHRM ...

Chapter Marketing

Chapter marketing materials Marketing Resources for Chapters and State Councils E-blast Requests For Super Mega Chapters ONLY For 100% Chapters ONLY For State Councils ONLY For Everyone Else Membership Marketing 2015-16 Member Marketing Brochure ...

Graphic Standards Manual for Affiliates

Learn additional information about SHRM's graphics standards and how to create a logo of your own!

SHRM Affiliate Logo Approval Request

SHRM's Affiliate Logo Approval Request Form

SHRM Affiliation Logo Use

Using SHRM's "Affiliate Of" Logo Graphics Guide: SHRM Approved Graphics Below please find the logos approved for use by (and only by) SHRM affiliated chapters and state councils. It is essential that the logo be used correctly in order to protect the registration

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KEY RESOURCES | BRANDING AND MARKETING

[HTTPS://COMMUNITY.SHRM.ORG/VLRC/COMMUNICATIONS/BRANDING-AND-MARKETING/BRANDING-CENTER](https://community.shrm.org/vlrc/communications/branding-and-marketing/branding-center)





Improper Proportion

Do not match the Society's name with a mark that is too large or too small in comparison.



Distortion

Avoid stretching, squeezing or otherwise manipulating the size of the Society's name or symbol in any way.



Separation

Do not reproduce the SHRM mark without the full Society name below it.

KEY RESOURCES | BRANDING AND MARKETING | GRAPHICS STANDARDS

[HTTPS://COMMUNITY.SHRM.ORG/VLRC/VIEWDOCUMENT/GRAPHIC-STANDARDS-MANUAL-FOR-AFFILI?COMMUNITYKEY=3FCE3C52-FE59-4917-8289-AF7D8B4190A9&TAB=LIBRARYDOCUMENTS](https://community.shrm.org/vlrc/viewdocument/graphic-standards-manual-for-affili?communitykey=3fCE3C52-FE59-4917-8289-AF7D8B4190A9&TAB=LIBRARYDOCUMENTS)



Acquisition

1 to 7 of 7 total

A-Z

Direct Mail Acquisition Template #2 - Benefit Listing

Membership Acquisition Template- benefit listing version instead of letter. See related chapter template mail merge sample file for related fields

Direct Mail Acquisition Template #1 - Letter format

Sample direct mail letter to prospects with mail merge fields, see chapter template mail merge sample file excel sheet.

Membership in SHRM and Chapter PDF 1

Customizable Membership in SHRM + Chapter PDF brochure version 1.

Membership in SHRM and Chapter PDF 2

Customizable Membership in SHRM + Chapter PDF brochure version 2.

2014 Membership Marketing Tips

Slides from the SHRM Membership Marketing Team, covers membership lifecycle, acquisition, engagement, retention, email best practices and more.

Sample Acquisition Mailing Template

Customize this sample letter to prospective members.

KEY RESOURCES | MEMBERSHIP | ACQUISITION

[HTTPS://COMMUNITY.SHRM.ORG/VLRC/NEW-ITEM3/ACQUISITION/CHAPTER-ACQUISITION](https://community.shrm.org/vlrc/new-item3/acquisition/chapter-acquisition)



«Prefix» «FirstName» «LastName»
«Title»
«CompanyName»
«Address_1»
«Address_2»
«City», «State» «Zipcode»

Dear «FirstName»,

On behalf of the Board, I would like to formally invite you to become a member of «ChapterName», a SHRM affiliate. You qualify for this exclusive privilege based on your experience and commitment to the HR profession.

Our organization is an indispensable resource for Human Resource professionals throughout the region. Our members represent individuals who recognize the importance of our professional affiliation for staying current on HR changes and trends and networking. As a member, you'll be able to continue your professional development, grow your contacts and collaborate with others with similar challenges.

We currently have a special offer to save \$«Discount» if you join online at «JoinURL», or mail your application below with payment mentioning promotion code «PromoCode» by «JoinByDate».

We look forward to welcoming you to our chapter community.

Sincerely,

«Chapter_Representative_Name»
«Chapter_Representative_Title»

P.S. Remember to complete and return the membership application below with dues payment to join. Or, join online today at «JoinURL».

MEMBERSHIP APPLICATION

Total Due: \$«DuesAmount»

Promotion Code: «PromoCode»

Full Name: _____ Title: _____

Company Name: _____

Company Name: _____

Full Name: _____ Title: _____

MEMBERSHIP APPLICATION

Total Due: \$«DuesAmount»

Promotion Code: «PromoCode»

Full Name: _____ Title: _____

Company Name: _____

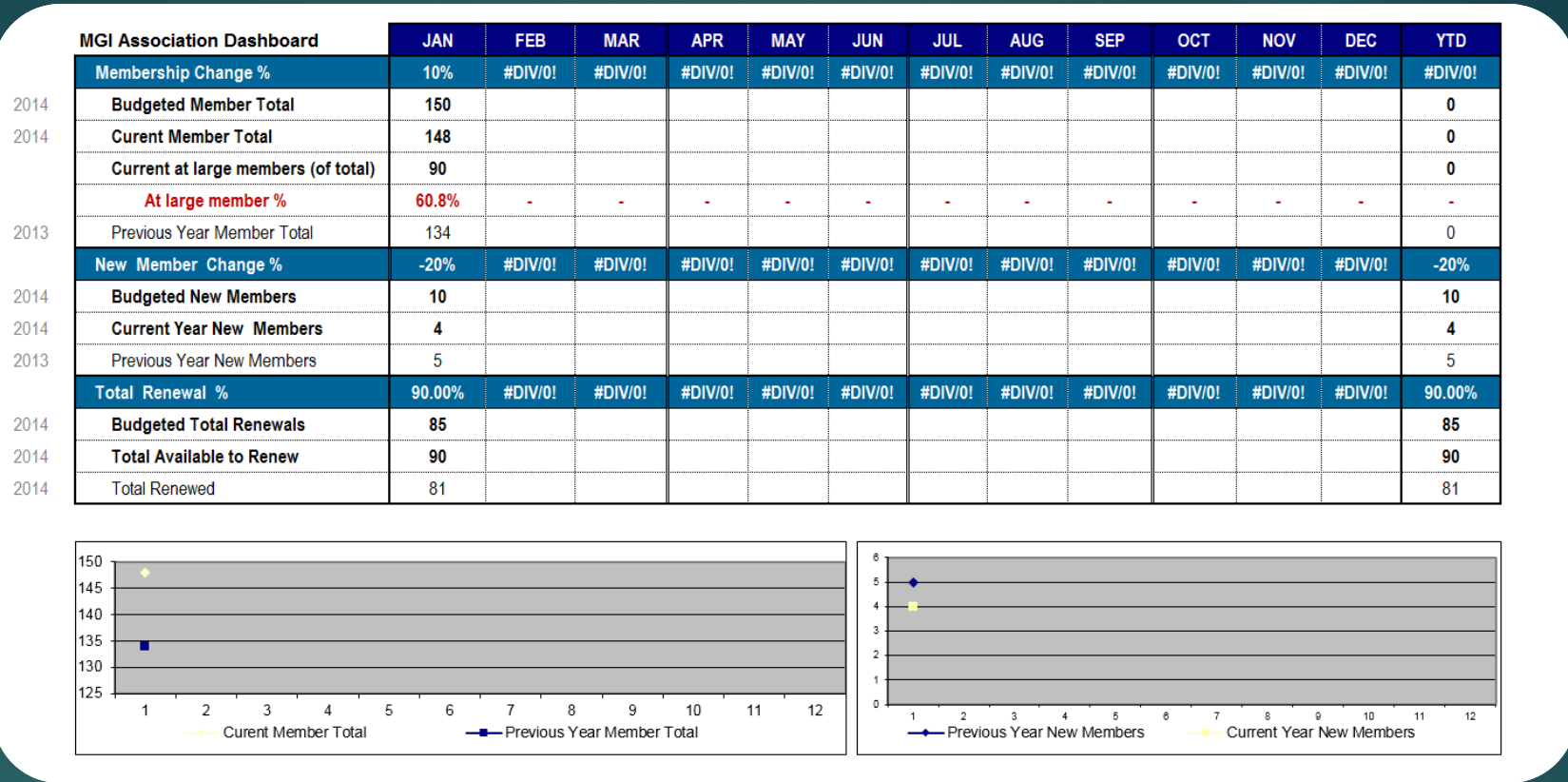
Company Name: _____

Full Name: _____ Title: _____

KEY RESOURCES | MEMBERSHIP | ACQUISITION

HTTPS://COMMUNITY.SHRM.ORG/VLRC/NEW-
ITEM3/ACQUISITION/CHAPTER-ACQUISITION





KEY RESOURCES | MEMBERSHIP | ASSOCIATION CHAPTER MEMBER METRIC CALCULATORS AND DASHBOARD

<https://community.shrm.org/vlrc/viewdocument/association-chapter?communitykey=3fce3c52-fe59-4917-8289-af7d8b4190a9&tab=librarydocuments>



Helping to Identify and Prepare New Volunteer Leaders: Who Will Fill Your Shoes?

Article on succession planning All of us are aware of the major significance of training, mentoring and succession planning for our organizations. Then why would we not apply these same principles to the success of our professional organizations? Who will fill our shoes? ...

How to Budget for Your Strategic Plan

Questions to ask yourself as you develop a Budget to achieve your Strategic Plan.

How to Budget for Your Strategic Plan

HR Young Professionals (YP's) Toolkit for SHRM Affiliated Chapters

Membership Recruitment & Retention Toolkit

Tools, tips and resources for attracting and retaining members in the chapter.

Mission Statement Template

Worksheet Template for creating a Mission Statement

Part I: Creating a Social Media Strategy or Plan of Action

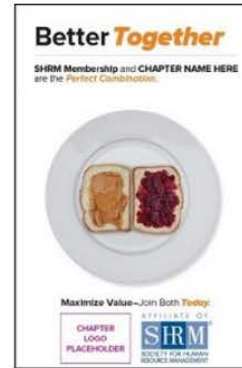
Tips and steps to creating a Social Media Strategy

KEY RESOURCES | TOOLKITS

[HTTPS://COMMUNITY.SHRM.ORG/VLRC/RESOURCES-SHRM/MANUALS-AND-TOOLKITS/TOOLKITS](https://community.shrm.org/vlrc/resources-shrm/manuals-and-toolkits/toolkits)



SHRM Affiliate Printing Portal



SHRM is excited to present the launch of the SHRM Affiliate Printing Portal – a one-stop shop for all your Chapter or State Council printing needs, at very reasonable prices.

We've partnered with a trusted outside vendor to produce editable templates for printed pieces that you can put to work for your organization with just a few clicks of your mouse. No need to worry about the proper branding on your printed pieces – we've already done it for you.

Customizeable Collateral

- Brochures
- Postcards
- Posters
- Brochures

Customizeable Collateral

a few clicks of your mouse. No need to worry about the proper branding on your printed pieces – we've already done it for you.

KEY RESOURCES | PRINTING PORTAL

[HTTPS://COMMUNITY.SHRM.ORG/VLRC/NEW-ITEM3/NEW-ITEM](https://community.shrm.org/vlrc/new-item3/new-item)



Questions?



MESHRM Initiative Updates



MESHHRM Initiative Updates

Participant registration deadline: May 26, 2017



bestplacestoworkinme.com

Celebratory banquet will be held on
October 10, 2017 | Augusta Civic Center



SHRM and HRCI credits for today will be sent via email, please make sure you have signed in or left your business card!



On behalf of SHRM
National and MESHRM,
we thank you for your
service to the profession!

