

2020-2021 Chapter Operations Management Tool

Reporting Requirements

Upload your [2020-2021 Chapter Annual Operational Plan](#) - Due August 15, 2020. (400 pts.)

Tip - The current Operational Report form and a planning guide is in Community Leader Resources in the [Chapter Operations Management Tool page](#).

[chapter-annual-planning-report_2020-2021.docx](#)

Comments:

Check here to confirm you have uploaded your 2020 - 2021 Chapter Annual Operational Plan.

Confirm

Upload your Annual Chapter Leadership Report. Due May 31, 2021. (400 pts.)

Tip - This form is available in the "my groups" tab of your ASSP account ([Process](#)). Before you submit this form; check to make sure you've listed all required leaders, you've reviewed the number of delegates allowed located at the bottom of your leadership report, and that you've reported on your sections if any.

[SF Chapter ASSP MEMBER ROSTER LEADERSHIP CHAPTER.xlsx](#)

Comments:

Check here to confirm you have uploaded your Annual Chapter Leadership Report

Confirm

Upload your chapter's [Annual Financial Report](#) - Due May 31, 2021. (400 pts.)

Tip - The current report form can be downloaded from the [Chapter Financials page](#) of Community Leader Resources. You'll also find useful information to complete the report.

* An internal audit of the chapters finances should be conducted annually see the [Financial Checklist](#) for guidance.

[San Francisco Chapter Annual Report FY2020-2021.xls - Compatibility Mode.pdf](#)
[SF Chapter Financial Checklist for 2020-2021.pdf](#)

Comments: Treasurers annual report and financial checklist uploaded by Treasurer

Check here to confirm you have uploaded your Annual Financial Report.

Confirm

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

\$ Total Revenue : 29267.41

\$ Total Expense (place a negative before the number) : -35712.57

Total : -6445.16

Operational Requirements

Provide the names of your Nominations and Elections Committee. (400 pts.)

Tip: Please visit the [Chapter Nominations and Elections](#) page in Community Leader Resources for tools and more information. The model chapter bylaws state that the committee should be made up of 3 - 5 people and formed by December 1.

Committee: Amanda Shin, Dave Paoletta, Tami Galt

Did your chapter publish a slate of candidates in the time frame required by your bylaws?

Yes (400 pts.)

Our chapter posted the slate of candidates on our website AND sent the slate to our members via email (90 pts.)

Required Chapter Website Updates.

You are required to review your entire website every 90 days (quarterly) to ensure it is current. Please check all the pages, with particular attention to the home page, calendar page, news page and officer page.

Reviewed between July-September (400 pts)

Reviewed between October-December (400 pts)

Reviewed between January-March (400 pts)

Reviewed between April-June (400 pts)

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

Maintain its website with monthly content updates (90 pts.)

Have a designated volunteer(s) responsible for ensuring our website is up to date (90 pts.)

Remove and/or archive files, new stories and other content on our website that were over 1 year old (90 pts.)

Other (40 pts.): Regularly update the jobs section of the website with job opportunities within our area

Other (40 pts.): Post news articles about recipients of Chapter scholarships

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

Send communications to our members on a consistent schedule (90 pts.)

Have designated volunteer(s) responsible for developing and distributing communications (40 pts.)

Chapter communications contain a mix of chapter, Society and OSH news and content (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)

Use social media (chapter Facebook page, Twitter, LinkedIn, WhatsApp, Telegram, etc.) to connect with members (40 pts.)

Other (40 pts.): we send personalized welcoming emails to all new members

Other (40 pts.): We send evaluation forms and surveys to all members

How many regional operating committee (ROC) meetings did your chapter president or proxy attend this year? You are required to attend at least one per year.

1 (400 pts.)

At least 1 additional ROC (total of 2 or more) (90 pts.)

Member Value Requirements

7. Our leadership team met at least six times this year and at least one of those meetings was for strategic planning. (400 pts.)

Yes

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

- Send one officer to ASSP's Leadership Conference (90 pts.)
- Send additional officer(s) to Leadership Conference (90 pts.)
- Participate in training at ROC meetings (90 pts.)
- Distribute and review a duty checklist for all incoming chapter leaders (90 pts.)
- Discuss the results of all chapter member surveys as an officer team (90 pts.)
- All our incoming officers participate in individual training or transition meetings with outgoing officers (90 pts.)
- All our chapter leaders take their on-line leadership position training from ASSP (90 pts.)

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

- Our chapter leaders take online operational training from ASSP (40 pts.)
- Use the leadership transition tools in Community Leader Resources (40 pts.)
- Gather best practices from other ASSP leaders (from chapters, practice specialties, common interest groups or the ASSP Community) (40 pts.)
- Other (40 pts.): email monthly bulletin to all member of coming events
- Other (40 pts.): We provided a ZOOM account for all San Francisco Section leaders to use for meetings and events

8. How does your chapter cooperate with Society in advancing the mission and strategic areas of focus for the organization?

- Support a student scholarship or the ASSP Foundation (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.)
- Other (40 pts.): We offer a wide range of new sections within our chapter (Hispanic, Construction, Grapevine & WISE)
- Other (40 pts.): BASS - Virtual Vendor Booths

9. Chapter Meeting Tracker

Your chapter is required to host a minimum of four accessible, face-to-face meetings that have clear educational objectives, are evaluated and facilitate members achieving at least two of the following:

Take advantage of career / personal advancement opportunities

Develop leadership skills

Attain certifications and earn CEU's

Expand their local network of safety professionals

Expand their technical knowledge

Fill in the details of your chapter meetings below. We recommend filling this in after each meeting.

	Meeting Month	# of Attendees	Member Goal 1	Member Goal 2	Type of Meeting	CEU's Offered
Meeting One (400 pts.)	July	16	Leadership skills	Leadership skills	Virtual	
Meeting Two (400 pts.)	September	20	Expand technical knowledge	Expand network	Virtual	
Meeting Three (400 pts.)	October	20	Expand technical knowledge	Expand network	Virtual	
Meeting Four (400 pts.)	November	12	Expand technical knowledge	Expand technical knowledge	Virtual	
Meeting Five (90 pts.)	December	11	Expand network	Expand network	Virtual	
Meeting Six (90 pts.)	January	59	Expand technical knowledge	Expand technical knowledge	Virtual	
Meeting Seven (40 pts.)	February	30	Expand technical knowledge	Expand technical knowledge	Virtual	
Meeting Eight (40 pts.)	March	250	Career/personal advancement	Expand technical knowledge	PDC	Yes
Meeting Nine (40 pts.)	April	30	Expand network	Expand technical knowledge	Special Event	No
Meeting Ten (40 pts.)	May		Expand technical knowledge	Career/personal advancement	Virtual	No
Meeting Eleven (40 pts.)	June		Expand technical knowledge	Leadership skills	Virtual	No
Meeting Twelve (40 pts.)	May		Expand network	Career/personal advancement	Virtual	No

Comments: The annual Bay Area Safety Symposium was offered as a virtual PDC this year.

How many meetings did your chapter host this year?

12 or more

What actions does your chapter take to host meetings?

Distribute chapter meeting notices 3-4 weeks prior to the meeting date (40 pts.)

Offer on-line registration throughout website for chapter members and guests to RSVP and/or pay for chapter events (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.)

Other (40 pts.): Post meeting information on LinkedIn

Other (40 pts.): Post meeting information on Twitter

Additional Member Value Activities

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.)

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.): Posted Resume and Job openings on the job board at the chapter PDC

Other (40 pts.): Referred job recruiter to post open jobs on ASSP Job Board

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.)

Use the succession planning tools in Community Leader Resources to identify and engage potential chapter leaders (40 pts.)

Send one potential leader who is not currently serving as an officer to ASSP's Leadership Conference (40 pts.)

Send additional potential leader(s) not currently serving as an officer to 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.)

Other (40 pts.): Promoted WISE mentoring program

Other (40 pts.): Speaking at local OSH classes in the AS program at Chabot/Las Positas College

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

Offer CEUs at our events (90 pts.)

Other (40 pts.): Add ASSP training classes to our monthly newsletter

Other (40 pts.): Technical meeting hosted BCSP on professional certification and CEUs

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.)

Other (40 pts.): Local College OSH students are granted paid admission to the Chapter PDC

Leverage the Society's annual Member-Get-A-Member campaign to recruit new members (40 pts.)

Other (40 pts.): Presentation to Chabot Las Positas college about ASSP membership

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

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

Other (40 pts.): Bay Area Safety Symposium - Held 5 tracks, one in Spanish

Other (40 pts.): Posted information on CGAC

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

Conduct a member survey to determine member expectations (90 pts.)

Conduct a post-meeting evaluation after each meeting (40 pts.)

Welcome new members with an e-mail, phone call, or personalized invitation to connect with the chapter on social media (40 pts.)

Personally greet members at meetings to create a welcoming environment (40 pts.)

Send personalized e-mail invitations to meetings (40 pts.)

Other (40 pts.): We post upcoming meetings on Social Media (Twitter & LinkedIn)

Other (40 pts.): Free technical meetings