

NAEP Strategic Pillar ACTION PLAN 2015

PILLAR: Chapter Development

Date: 30-Sep-16
Form submitted by: Bill Plumpton

Pillar Description: NAEP's network of chapters does vital work in their local communities. Our strategic planning team, which includes active chapter leaders, believes that, working with each chapter, we can strengthen the organization's impact on the communities we serve. If we do that, both NAEP and the local chapter will benefit.

Pillar Members: Chapters Committee

GOAL #1

Increase NAEP's Chapter Footprint

2016 Objective: 4 new chapters brought on board

Task	Responsible	Timeline	Resources	Budget Request <small>(specify immediate needs from 2016 Budget)</small>	Status	Notes
1.1 Bring immediate assistance to any Chapter in distress or asking for assistance						
1.2 Regain Chapters choosing recently not to continue affiliation with NAEP - PA, IN, and Rocky Mountain (in some fashion or subset)	Bill, Brock				In progress.	Information has been sent to PAEP and reviewed with the Board of Directors; the PAEP does not want to re-establish affiliation with NAEP. Information has been sent to IN and Rocky Mountain for consideration.
1.3 Recruit existing AEPs operating in SD, SC and possibly elsewhere and promote affiliation with NAEP	Bill, Ward				In progress.	Information has been sent to Central Texas AEP for consideration. Ward is coordinating with SC. Bill needs to reach out to SD and possibly others.
1.4 Start new Chapters in locations expressing interest in starting a Chapter	Bill, other volunteers				In progress.	Chapters Committee responds to those expressing interest in starting a Chapter. To help start a Chapter, efforts in the Boston-area are being expanded to all of Massachusetts. No update from Louisiana AEP on affiliation with NAEP. Individuals continue to express interest in starting Chapters but haven't taken the first few steps.
1.5 Proactively work to create Chapters in states or regions without one	Bill, other volunteers				In progress.	STAEP continues to work on building membership and organizing.
1.6 Revise NAEP's guidance "How to Start a Chapter" and the remainder of the Chapter start-up kit						
1.7 Reexamine Chapter Committee meetings to ensure they are providing maximum value to committee members and generating work products and results that make a difference						

Immediate Next Steps:

Notable Successes: As of July 2015, the Chapters Committee has completed all actions identified at the 2012 Chapter Retreat, including modernizing the NAEP-Chapter Affiliation Agreement

Potential Roadblocks:

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Pillar Members: Chapters Committee

GOAL #2

Increase in Chapter Representative participation in committee activities

2016 Objective: Growth over 2015 levels

Notes: Need to establish 2015 baseline and quantifiable goal for 2016

Task	Responsible	Timeline	Resources	Budget Request <i>(specify immediate needs)</i>	Status	Notes
2.1 Finalize the joint NAEP-Chapter tri-fold brochure and distribute to Chapters for use						
2.2 Institutionalize concept of making regular phone calls by Chapter Representatives to prospective NAEP and Chapter members using quarterly lists and talking points provided by the National Office	Committee, Membership Committee, staff to provide lists					
2.3 More fully identify and fulfill Chapters' ideas and needs for marketing and communicating for Chapters	Committee				In progress.	Discussions started September 2016.
2.4 Establishment of a formalized chapter liaison program <i>(determined as a PRIORITY at Austin July 2015 Board Meeting)</i>	Committee	Completed discussions at the Committee meeting on 8/24/15	none	none	complete	Chapters want elected Board members to attend their annual conferences and speak about changes at NAEP and the benefits of affiliation. An elected board member could attend a Chapters' board meeting by phone or WebEx or something similar, but it would not have the same impact as attending their conference and speaking about NAEP and the benefits of affiliation. Chapters don't need too much assistance running their Chapters day-to-day. Creating a liaison program and having elected board members visit Chapters could increase relationships and build NAEP's membership.
2.5 Explore opportunities to make it easier for Chapters to contribute to the newsletter and encourage all Chapters to contribute to it regularly						
2.6 Promote prominently displaying NAEP and affiliation with NAEP on individual Chapters' websites						One item that would help Chapters would be more advance notice for webinars. On occasion, Chapters only have a couple of weeks advance notice for webinars and it's too late to plan Chapter events. The Education Committee works months in advance to plan webinars and it takes a great effort to plan one as speakers often change at the last minute due to schedule conflicts. It was suggested that NAEP make better use of the calendar of events on the website and use it to provide more advance notice, even if all webinar speakers haven't been confirmed.
2.7 Ensure Chapters take full advantage of affiliation with NAEP by distributing NAEP materials and other information to Chapter-only members	Committee				In progress.	
2.8 Fully implement the Speakers Bureau with high quality speakers and relevant topics	Committee or other volunteer				Tabled until NAEP can find a champion to run it.	While the framework to create a Speakers Bureau was created, NAEP lacks a champion for it. No current activity.
2.9 Encourage travelling NAEP leadership to coordinate board outreach with their professional travel schedules <i>(determined as a PRIORITY at Austin July 2015 Board Meeting)</i>	Committee	Completed discussions at the Committee meeting on 9/28/15	none	none	Completed.	NAEP maintains a calendar of events; it includes NAEP and Chapter events. If Chapters send event information to their members, consider adding Tim and Abby to the message. This is a simple way to get the information on the NAEP calendar of events. Chapters can also give their communications officers, if they have one, Tim's and Abby's contact information. Tim and Abby will join Chapter LinkedIn and Facebook groups to receive information on future events to be added to the calendar. Board members are encouraged to check the NAEP calendar of events and Chapter websites in advance of traveling and participate in Chapter events when possible.

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Pillar Members: Chapters Committee

Immediate Next Steps:

Notable Successes:

Potential Roadblocks:

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Pillar Members: Chapters Committee

GOAL #3

Increase in Chapter Representative participation in board activities

2016 Objective: Growth over 2015 levels

Notes: Need to establish 2015 baseline and quantifiable goal for 2016

Task	Responsible	Timeline	Resources	Budget Request <small>(specify immediate needs from 2016 Budget requirements)</small>	Status	Notes
3.1 Prominently display the role and responsibilities of the Chapter Representative on the Chapter Resources webpage, review it annually at a Committee meeting and review it in detail with prospective and new Chapter Representatives	Committee				Completed.	The role of the Chapter Representative was defined and responsibilities identified and it was posted on the Chapter Resources webpage.
3.2 Develop and promote the concept for "role sharing" for Chapter Representatives					Completed	As Chapter Representatives are members of the Board of Directors and help run NAEP, it can be difficult at times to help run both a Chapter and NAEP. NAEP recognizes this and is working to make the job of Chapter Representative as easy as possible. The concept of role sharing for Chapter Representatives was briefly discussed. Two Chapters have tried to role share Chapter Representative responsibilities only to determine it really doesn't work well in practice. These two Chapters have since gone to a primary Chapter Representative and alternate or back-up approach. With no enthusiasm for the concept of role sharing for Chapter Representatives, no further action will be taken.
3.3 Explore ways for Chapter Representatives to participate in Board of Director meetings in addition to conference calls						
3.4 Standardize the format for quarterly Chapter reports to the Board to help increase the quantity and quality of Chapter reports submitted					Completed.	Over time, the number and quality of Chapter Reports submitted to the board has steadily decreased the last few years. Chapter Representatives thought two things would assist with preparing and submitting quarterly reports to the Board: 1) more reminders, and 2) a standard form. A standard form was developed and given to Chapters and Chapters were reminded they can use any format.
3.5 As a Chapter leader and on behalf of an individual Chapter, help Chapter Representatives take full advantage of the benefits of affiliation with NAEP						
3.6 Create meaningful opportunities to highlight Chapters and discuss Chapter activities and actions at Board of Director meetings	Committee				In progress.	Started spotlighting one Chapter at each Board meeting to take a deeper dive into understanding one Chapter at a time. Copies of presentations and other materials are posted on the Chapter Resources webpage.
3.7 Creation of a chapters annual snapshot (think simplified dashboard style) for ongoing inclusion in board meeting materials <small>(determined as a PRIORITY at Austin July 2015 Board Meeting)</small>	Committee				Completed.	Creation of a simple Chapter one-page profile for posting on the Chapter Resources webpage was identified as a priority for the Chapter Committee at the July 2015 board meeting. The intent is to create a snapshot of Chapters to help understand each other just a little bit better; once developed, it could serve as a resource for other Chapters (e.g., two chapters using the same membership management software and one has a question; the other may be able to answer the others' questions). A draft Chapter profile was discussed. No changes were suggested. To help test the effectiveness of the Chapter profile, Chapter should complete the one-page profile for 2016 and send it to Tim.

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<p>3.8 Making existing chapter templates, and other resources, more accessible on the NAEP website <i>(determined as a PRIORITY at Austin July 2015 Board Meeting)</i></p>	<p>Committee</p>				<p>Completed.</p>	<p>The NAEP website has a page dedicated to Chapter resources; to view it, login and the tab is located in the lower left corner. The Chapter Resources page is a page to store and share Chapter-specific items with other Chapters. In addition to the most recent list of Chapter Representatives and Presidents and a couple of NAEP items for Chapters, the Chapter Resources page includes NAEP's Chapter start-up kit, bylaws, conference and meeting announcements, sample 990 filings, membership brochures, student chapter information scholarship information and previous Chapter Committee quarterly reports to the Board of Directors. The purpose of the Chapter Resources webpage is provide a location for Chapters to share resources with other Chapters. Through sharing of information, Chapters may get ideas from other Chapters and it may promote efficiency and standardization by not having to reinvent items that already exist. While some of the information on the Chapter Resources webpage is current, some of it is dated. Before the next Chapter Committee meeting, Chapters should go to the Chapter Resources page, view the information that is available, and consider adding to the body of knowledge. To contribute items to the Chapter Resources webpage, email them to Bill and Tim.</p>
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Immediate Next Steps:

Notable Successes:

Potential Roadblocks: