

## SMPS Healthy Chapter Checklist

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The Healthy Chapter Checklist, developed by SMPS HQ, is a tool for chapters to self-audit and objectively indicate their chapter's management practices and identify gaps in operations.

The checklist reflects the following components of chapter management, with diversity, equity, and inclusion (DEI) woven into each component:

- Communications
- Education and Programming
- Finance and Administration
- Governance and Strategic Planning
- Membership
- Recognition and Sponsorship

SMPS HQ is available to guide all volunteers and provide smart practices to help chapters thrive and succeed. If you have questions about this checklist or any chapter-related questions, please contact [SMPS Component Relations Manager Dorothy Mitchell](#).

### Communications

- Is a communications strategy included in your chapter's strategic plan?
- Does your chapter adhere to [SMPS branding guidelines](#)?
- Does your chapter's website list your board of directors by position and include their firm and their contact information?
- Does your chapter have a well-maintained presence on at least one platform valued by your target audience?
- Do your chapter social media channels post frequently and during live events?
- Does your social media platform(s) share industry-wide and Society news?
- Do you have chapter signage and branding at your chapter events?
- Does your chapter leverage and customize the return address, "from" name, subject line, and preview text in your chapter emails for clarity and impact?
- The perceived top-two member benefits of SMPS membership are networking and professional development. Does your chapter website have the [MySMPS membership directory](#) and upcoming chapter events/programs listed in the navigation?

- Does your chapter recognize your sponsors, as contracted, across your website, email, social media, and digital platforms?
- Does your chapter have an email strategy that optimizes open rates?
- Does your chapter highlight/feature your diverse members in regular chapter communications?
- Does your chapter use inclusive language in all communications collateral? (social media, graphics, invitations, etc.)
- Does your chapter leverage the [HQ Diversity, Equity, and Inclusion Philosophy & Policy statement](#)? Is it visible on your website and in your chapter marketing and communications materials?
- Does your website link to important SMPS HQ webpages such as: [the SMPS homepage](#), [the SMPS Join page](#), [the SMPS Member Benefits page](#)?

## Education and Programs

- Is an educational programming strategy included in your chapter's strategic plan?
- Does your chapter host at least six educational programs per year with each covering one of the six [SMPS Domains of Practice](#)?
- Has your chapter reviewed past chapter education reports to glean program and education ideas for your chapter?
- Has your chapter submitted your annual chapter education report (due by September 30) to [SMPS Component Relations Manager Dorothy Mitchell](#)?
- Does your chapter connect and collaborate with industry partners on joint programs?
- Does your website list future events and programs?
- Does your chapter assess knowledge and needs before developing programs?
- Does your chapter send surveys, or solicit feedback in any way, after your chapter's events and programs?
- Does your chapter take advantage of and use [SMPS HQ's complimentary content](#) that includes: e-books, learning labs, and more as supplemental programming for your members?
- Does your chapter seek to welcome and engage diverse individuals in your events?
- Does your chapter ensure there is at least one diverse voice included in each program?

- Does your chapter target diverse groups to promote programs?
- Does your chapter offer discounted registration pricing for Certified Minority Business Enterprises\*?

\*Certified Minority Business Enterprises include, but are not limited to, Minority Owned, Disadvantaged, Minority and Women Owned, and Women-Owned Small Business Enterprises

## Finance and Administration

- Does your chapter have an annual operating budget?
- Are your reserves at least 50% of your operating budget?
- Was your operating budget finalized before September 1 and approved during/before your first board meeting?
- Are your financial results measured against budget goals and reported to your board on a regular basis?
- Does your chapter have a finance committee?
- Does your chapter conduct an annual financial audit or review?
- Are your treasurer and chapter team committed and prepared for the January filing deadline for the IRS Form 990?
- Has your chapter submitted your annual chapter finance report (due by September 30) to [SMPS Chief Financial Officer Antonio Payne, CPA](#)?
- Is there a process in place for recruiting and training your incoming treasurer?
- Does your chapter participate in philanthropic initiatives?
- Does your chapter track vendor spends with Certified Minority Business Enterprises\* suppliers (vendors, venues, etc.)?

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## Governance and Strategic Planning

- Is your chapter incorporation status current?

- Have your chapter bylaws been formally reviewed within the previous three to four years?
- If your bylaws have undergone a formal review within the previous three to four years, is your chapter operating in accordance with, and aligned with, your bylaws?
- Are all chapter board members familiar with the chapter bylaws and policies and procedures?
- Is each position on your chapter executive committee filled?
- Does your chapter have frequent and regular board meetings (at least 6 times a year)?
- Are chapter financials reported at every board meeting?
- Does your chapter utilize consent agendas prior to board meetings to streamline reporting?
- Does your chapter have a current strategic plan?
- Has your strategic plan been reviewed within the last year to ensure that your chapter is on track?
- Does your chapter conduct an annual strategic planning session prior to the program year, or early within the program year?
- Does your chapter currently have a chapter advisor (formally known as chapter champion)?
- Does your chapter have a talent development plan in place (also known as succession planning)?
- Does your chapter store documents within your [Board of Directors MySMPS community](#) to archive and take advantage of this unlimited storage and conveniently accessible resource?
- Have your chapter board and volunteers reviewed and signed [Chapter Leader's Code of Conduct](#)?
- Are the actions and behaviors of your chapter board guided by the [SMPS mission and vision](#)?
- Is your chapter board familiar with the [affiliation agreement](#) between HQ and chapters?
- Does your chapter have an organizational chart to show the relationship among committees and board?

- Does your chapter have volunteer position descriptions readily available for current and potential volunteers?
- Did your chapter board view the [Society's volunteer orientation playlist on MySMPS](#)?
- Have the chapter management resources and tools provided by SMPS HQ been shared with all your chapter volunteers?
- Does your chapter recognize volunteers and encourage members to join chapter committees at events or programs?
- Does your chapter president encourage attendance at SMPS HQ Chapter Leader Meetups and/or review the meeting recaps that are posted on the [Chapter Volunteer Calendar](#)?
- Do your chapter leaders participate in the SMPS DEI Townhalls/Chapter Leader Meetups?
- Does your chapter monitor industry trends?
- Does your chapter monitor cultural shifts to respond to member changing values, needs, and desires?

## Membership

- Is a membership strategy included in your chapter's strategic plan?
- Does your chapter host new member orientations?
- Does your chapter celebrate and recognize/highlight new and long-tenured members?
- Does your chapter highlight/thank member firms?
- Does your chapter conduct personal phone calls to expiring members?
- Does your chapter thank members after they renew?
- Does your chapter access the [chapter reports extranet](#) to pull your chapter rosters? (access given to president, president-elect, and membership chair)
- Has your chapter reached out to [SMPS HQ Member Engagement Coordinator Matthew McFadden](#) for additional support (i.e., membership benefit overview, certificates, giveaways)?
- Has your chapter surveyed your members within the last year to gauge member needs?
- When a member drops, do you reach out/survey them to gauge any missed opportunities?

- Does your chapter have membership brochures at every chapter event or provide your members with electronic copies (found on [SMPS HQ website](#) and HQ staff can also send physical copies)?
- Does your chapter [download the monthly demographic report](#) provided by SMPS HQ to analyze your current membership on a regular basis?
- Does the call to join on your chapter website point potential members to [the SMPS HQ site](#)?
- Does your chapter make your membership aware of SMPS HQ member benefits ([Career Center](#), [Salary Survey](#), [MySMPS](#), [complimentary SMPS HQ Webinars](#), [Marketer](#), etc.)?
- Does your chapter regularly review your chapter demographic report provided by SMPS HQ and strive to reflect diversity?
- Does your chapter have a member retention strategy?
- Does your chapter strategize to retain a more diverse membership?
- Does your chapter have a member recruitment strategy?
- Does your chapter strategize to recruit a more diverse membership?
- Do your chapter board members welcome new members to your chapter (a cup of coffee, phone call, lunch, virtual meet and greet, email, etc.)?
- Does your chapter have a mentorship program?
- Does your chapter engage diverse pairings in your mentorship program?
- Does your chapter actively foster a culture of inclusion through events, programs, and communications?

## Recognition and Sponsorship

### Recognition

- Does your chapter recognize board member firms on your website?
- Does your chapter host a recognition program(s) to recognize firm and/or individual excellence in marketing in the design and building industries?
- If your chapter hosts a recognition program(s), do you have a category targeting Certified Minority Business Enterprise\* firms, professionals, and speakers?

### Sponsorship

- Is a sponsorship strategy included in your chapter's strategic plan?

- Does your chapter have annual sponsors?
- Does your chapter meet sponsorship goals?
- Does your chapter have individual event sponsors?
- Is your chapter honoring all items within sponsor contracts?
- Has your chapter recently reviewed your sponsorship packages?
- Has your chapter recently connected with your sponsors to gauge their needs and desires for the partnership with your chapter?
- Does your chapter have a targeted list of Certified Minority Business Enterprise\* firms to solicit for sponsorships?
- Does your chapter have a Certified Minority Business Enterprise\* business sponsorship category with a reduced rate?
- Has your chapter reached out to diverse business associations in your area to gauge co-sponsorship opportunities?

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