



VOLUNTEER



Leadership

SUMMIT

Welcome to the 2020 CalSHRM Volunteer
Leadership Summit



CALIFORNIA
STATE COUNCIL OF SHRM



Welcome & Agenda Review

- ▶ Welcome All Leaders!
- ▶ Friday
 - ▶ SHRM Presentation
 - ▶ Strategic Business Landscape...Competition in CA
 - ▶ Government Affairs
 - ▶ CalSHRM Presentation
 - ▶ CalSHRM Mini Board Meeting
 - ▶ CLA Speed Dating!
 - ▶ Dinner & Hosted Reception: Coast Restaurant
- ▶ Saturday
 - ▶ Breakfast
 - ▶ Day two Agenda Review
 - ▶ Breakout Sessions
 - ▶ Lunch, Pool Deck West
 - ▶ Keynote Presentation: Kevin Sheridan!
 - ▶ Resource & Speakers for your Chapter
 - ▶ Conclusion/Closing Remarks



CALIFORNIA
STATE COUNCIL OF SHRM



Sponsorship Introduction



CALIFORNIA
STATE COUNCIL OF SHRM





VOLUNTEER



Leadership

SUMMIT

SHRM Volunteer Leader Overview

Jon Decoteau SHRM-SCP, Division Director West

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mobile 916.990.7483



CALIFORNIA
STATE COUNCIL OF SHRM



[illegible]

You Area a BIG Part of SHRM Success in California

Lot's Of Information – Networking will Help

- SHRM Resources To Help You Do Your Job
- Some Basics About SHRM, Chapter Housekeeping and Compliance
- SHRM>CalSHRM>Your Chapter – Who Does What
- Money from SHRM and Marketing Support for Your Chapter
- Help with Programming
- SHRM Certification and Chapter Awards from SHRM

Bonus Slide
CA Micro-credential

Insert chapter lo



If You Only Take One Document From This Event

Top tips for SHRM Volunteer Leaders

Congratulations on your new volunteer role in your local chapter or state council! We are grateful to have your help and excited for you to begin your journey as a volunteer leader representing SHRM in your state council or local chapter. We have a few tips to help you get started in your new role.

1: Visit the Volunteer Leader Resource Center (VLRC).

Check out the [Volunteer Leader Resource Center](#) for information on chapter and state council deadlines, Core Leadership Area (CLA) resources, toolkits for member engagement, events, and more.



2: Get advice from your peers on the Volunteer Exchange.

Need a sounding board for a new event idea? Want to know what other chapters and state councils are doing to engage members and provide programming that helps them with their responsibilities in the workplace? [Post a message on the Volunteer Exchange](#) and let others weigh in!

3: Don't forget to read the SHRM Volunteer Update!

We know you're busy wearing many hats that's why we send the SHRM Volunteer Update email once a month. This email, exclusively sent to volunteers, provides information about key deadlines, new resources, and opportunities helpful for all volunteer leaders.

4: Listen to volunteer webinars (live or recorded).

The **full offering of Core Leadership Area (CLA) webinars** is now available on the following topics: Membership, Certification, College Relations, Diversity, SHRM Foundation, Government Affairs and Workforce Readiness. Listen to previously recorded webinars from 2017 or add upcoming 2018 webinars to your calendar.

5: Contact a member of your SHRM Regional team.

SHRM's Field Services Team and Member Engagement Associates are available to answer any questions you may have. [Meet your regional team](#) and do not hesitate to reach out!

community.shrm.org/vlrc

This is It!

Big Time Help

26%

Google tip

Insert ch



PLEASE TAKE OUT YOUR PHONE

Volunteer Leaders' Resource Center (VLRC)

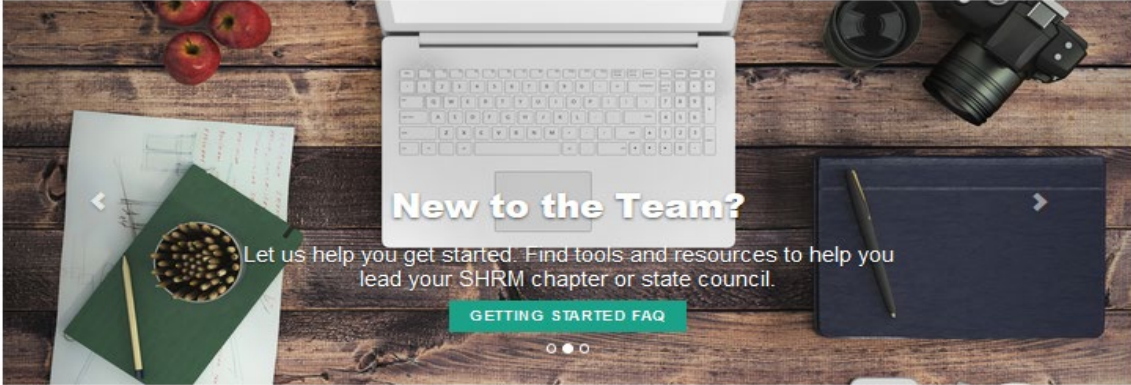
Online at www.shrm.org/vlrc

VLRC

SHRM's Volunteer Leader Resource Center

LEADERSHIP - MEMBERSHIP - BUSINESS OPERATIONS - SHRM CERTIFICATION - AWARDS/SCHOLARSHIPS

Term / Keyword / Phrase



New to the Team?

Let us help you get started. Find tools and resources to help you lead your SHRM chapter or state council.

[GETTING STARTED FAQ](#)

DEADLINES AND EVENTS


Deadline for CLIF and SCLIF Submissions
December 1, 2017

Certification CLA Webinar
December 6, 4:00pm - 5:00pm

Deadline for **Chapter SHAPE** and **State Council SHAPE** Applications
January 31, 2018

Deadline for Excel Award Applications
March 15, 2017

THE LIFE OF AN FSD



SHRM - The Road Warrior

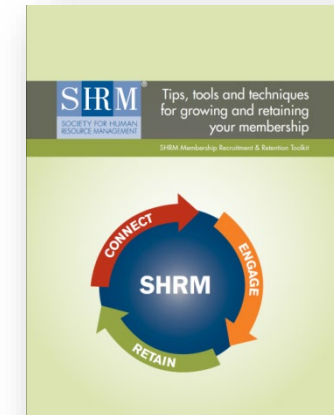
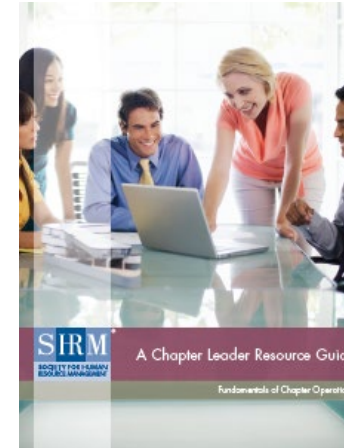
Follow one of our Field Services Directors, Scott Ferrin, for a day and see his life both on and off the road.



Volunteer Leaders' Resource Center (VLRC)

Online at www.shrm.org/vlrc

- **Chapter Leader Resource Guide**
- Chapter Best Practices
- Sample Bylaws
- Chapter Toolkits
- Non-Dues Revenue Ideas
- **Fundamentals of Chapter Operations**
- Chapter Leader Position Descriptions
- **Guide to Chapter Financial Management**
- Core Leadership Areas
- Volunteer Leaders' Webcast Series
- **Membership Recruitment & Retention Toolkit**
- Programming Ideas
- Web Site Resources
- Resources for Working with Volunteers
- AND MUCH MORE!!!



SHRM Resources for Volunteer Leaders

Chapter Activities by Month

SHRM 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 issues 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).• 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 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 Field Services Director (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 Regional Administrator. Keep SHRM informed of any changes to e-mail addresses, contact information, and role changes as they occur.	<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 members are aware of the membership resources available from SHRM.• Mark your calendars for key events during the year, such as the conference calls for chapters by size, Core Leadership Area (CLA) calls and webinars, state council meetings (chapter presidents should attend these meetings), state leadership events, SHRM conferences, 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.• Super mega and 100% chapters are allowed two e-blasts per quarter to promote their activities to all SHRM members in the chapter's ZIP code range. Complete the online request form in the VLRC.	<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.• Review the chapter's charter with your board (if you cannot locate this document, you can request it from your RA at SHRM).• Provide the Guide to Financial Management to treasurer and other key volunteers (all should review it).• Check the LeadersEdge blog for news and updates from SHRM.• 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 info about your volunteer role.

Available on VLRC

SHRM Resources for Volunteer Leaders

Monthly SHRM Update for volunteer leaders

SHRM Update

The Update is emailed to volunteers each month.

Look for conference call & webinar dates, upcoming deadlines, important volunteer news from SHRM, upcoming events and conferences, new SHRM-member benefits, and contact information.

Chapter President communication is also emailed each month.



December 3, 2018



Two things you need to know now...

1. **The 2018 Volunteer Leaders' Summit presentations are now available!** Whether or not you were able to attend the 2018 Volunteer Leaders' Summit, you can now access Summit session presentation and use them for 2019 planning. Visit <https://presentations.shrm.org/leadership> to find helpful tips on chapter and state council leadership, membership, business operations, SHRM certification and more!
2. Ready to renew your SHRM membership? Want to give yourself an early holiday gift? Know someone else who needs to renew? **Use code CHAPTER25 or STATE25 to save \$25** when you renew by December 31, 2018. Stay connected with our powerful network — more than 300,000 strong.



November 26, 2018



In the final weeks of 2018 — finish strong and look ahead

As always, we want to thank you for your service to the professional, the profession and SHRM. Our commitment to creating better workplaces for a better world is only possible through developing and supporting our network of passionate volunteer leaders.

With thanks in mind, in the coming months you will hear more about what we can do for you, and how we can help you succeed in your role! So stay tuned and finish 2018 strong.

To show our thanks, receive **\$25 off** your membership when you renew by 12/31 using the code **CHAPTERS25**. [Renew today!](#)

SHRM Resources for Volunteer Leaders

SHRM Annual Volunteer Leaders' Business Summit



Held each **November** for key volunteer leaders:

- **Chapter President or President-Elect**
- State Council Director and State Council Director-Elect
- State Council Membership Director
- State Council District Directors
- **Chapter Management Professional (CMP)**
- Member Advisory Council (MAC) Representative

**Always held in November
before Thanksgiving**

Provides opportunities to gain information about your volunteer role, enhance your leadership development skills, network with peers, share effective practices and challenges across region and engage with SHRM staff!

SHAPE Section II; Item 3:

The chapter will be represented at the annual SHRM Volunteer Leaders' Summit by either the chapter president, the president-elect (preferred) or another board member, who will relay the information back to the chapter's board.

Some Basics About SHRM



As the voice of all things work, workers and the workplace, SHRM is shaping the way employers and employees thrive together.



Driving social and economic change in the workplace.



Fostering work environments that serve business and employees equally.



Empowering people and workplaces by advancing HR practices and maximizing human potential



SHRM: Who We Are



Purpose

Elevate HR



Vision

HR building a world of work that works for all



Mission

SHRM empowering people and workplaces by advancing HR practices and maximizing human potential

About SHRM

Overview

- Founded in **1948**, SHRM currently has more than **575** affiliated professional chapters and **400** student chapters.
- SHRM headquarters is in Alexandria, VA.
- SHRM has more than **300,000** professional and student members in more than **165** countries.
- SHRM has about **400** staff members and more than **7,000** volunteer leaders!
- Visit SHRM Online at www.shrm.org



SHRM Volunteer Structure

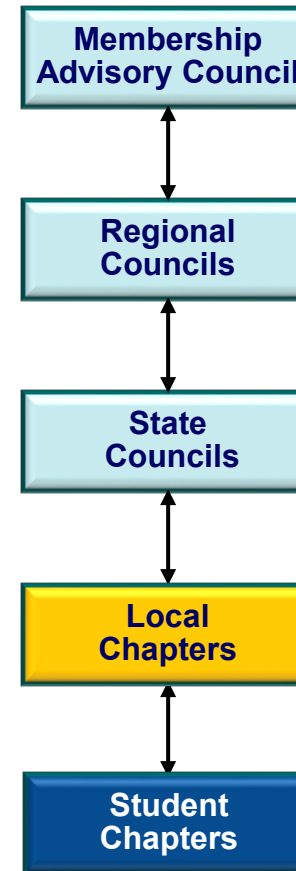


**MAC = Membership Advisory Council*

Your Chapter

SHRM Chapter Affiliates

- Your Chapter is one of a network of 575 affiliated SHRM chapters
- Your chapter serves to provide local networking and professional development opportunities for our members and their guests/visitors
- Each chapter holds a seat on the State Council; our chapter president is our representative to our State Council



SHRM Affiliated Chapters	
Chapters are categorized into five sizes	
Small	up to 100 members
Medium	101–300 members
Large	301–500 members
Mega	501–1,000 members
Super Mega	1,001+ members

Insert chapter logo here

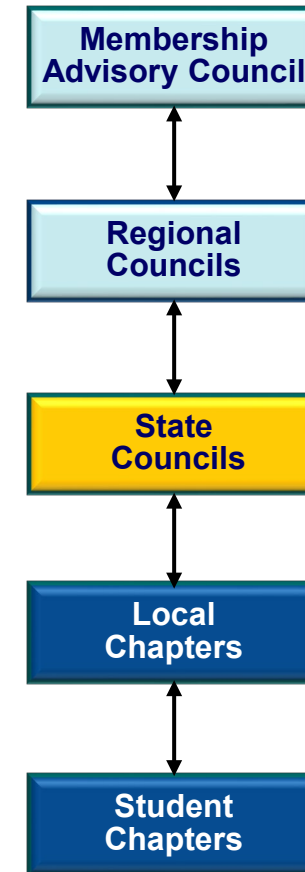
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AFFILIATE OF
SHRM
SOCIETY FOR HUMAN
RESOURCES MANAGEMENT

CalSHRM State Council

SHRM State Council Affiliates

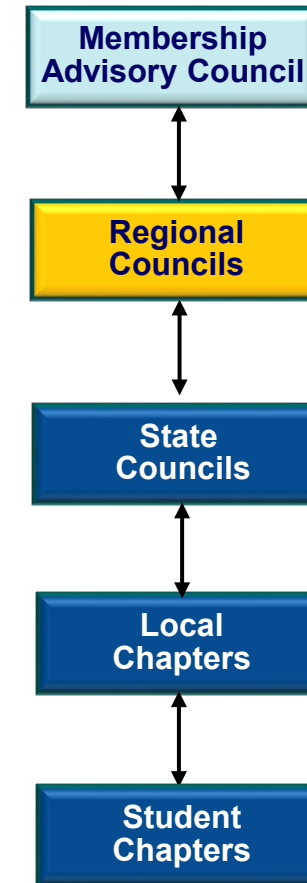
- Each state is governed by a state council with a state council director. The state council director is a member of the regional council.
- State councils typically hold quarterly meetings for members to discuss issues and challenges, pending legislation, the HR profession, and how SHRM supports these.
- State councils engage in activities that raise the visibility and credibility of the HR profession and SHRM in the state. Such as SHRM Membership SHRM Chapters and SHRM Certification



Our Regional Council

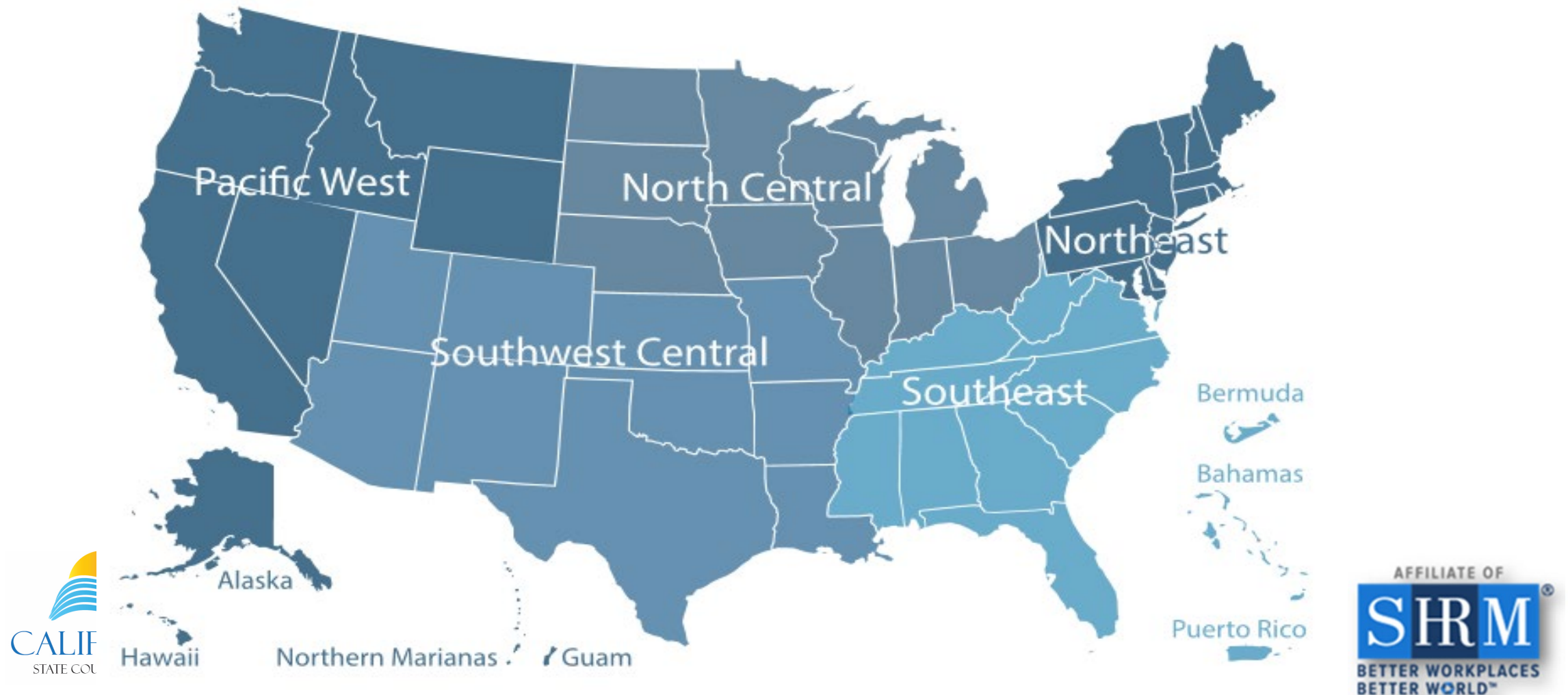
SHRM Regional Councils

- Each of the five geographic regions in the U.S. has a regional council, composed of the state council directors.
- The regional council provides a structure for state directors and state directors-elect to work together with SHRM staff.
- SHRM staff facilitates successful practice-sharing among state councils to achieve SHRM's strategic priorities.
- Regional councils provide guidance and assistance to state councils and chapters.



Our Regional Council

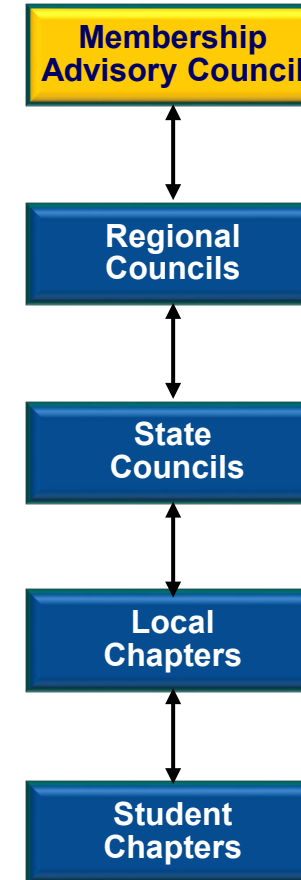
SHRM's Five Geographic Regions



SHRM Membership Advisory Council

MAC

- The MAC is composed of five elected volunteer representatives, one from each of the regional councils.
- Serves as an interface and two-way channel of communication between the volunteer leaders and the SHRM Board of Directors.
- Provides input from the membership to the SHRM Board of Directors and feedback from the SHRM Board to the membership; and provides operational input to SHRM to ensure optimum service/support to and from the volunteer leadership.



2019 Membership Advisory Council

MAC

North Central Region

- Pat J. Lund, SHRM-SCP, SPHR (South Dakota)

Northeast Region

- Faith Stipanovich, SHRM-SCP, SPHR (Pennsylvania)

Southeast Region

- Jeffrey Luttrell, SHRM-SCP, SPHR (North Carolina)

Southwest Central Region

- John Young, SHRM-SCP, SPHR, CCP (Utah)

Pacific West Region

- Mandy Woulfe, SHRM-SCP (Hawaii)

SHRM Executive Team



Johnny C. Taylor Jr., J.D., SHRM-SCP
President & CEO



Jeaneen Andrews-Feldman
Chief Marketing & Experience Officer



Michael P. Aitken
Senior Vice President for Membership

SHRM Staff – Your California Team

Divisional Director and Member Engagement Associate



Jon Decoteau, SHRM-SCP
Divisional Director – West
Jon.Decoteau@shrm.org



Kevin Abbed
Member Engagement Associate
(MEA)
AK, AR, AZ, CA, CNMI, CO, Guam,
HI, ID, KS, LA, MT, NM, NV, OK,
OR, TX, UT, WA, WY
Kevin.Abbled@shrm.org

SHRM Regional Teams – Jon's Role

Field Services Directors (FSDs)

- Main point of contact for State Councils, Chapters, and other SHRM members in their respective states/territories
- Communicate and promote SHRM vision, mission and strategic priorities
- Ensure that chapters maintain affiliation standards and guide them in growing membership and achieving excellence

Find your FSD at:

<https://community.shrm.org/vlrc/shrm-certification/viewvllrcarticle?DocumentKey=d3976543-ecb7-4898-b0ee-11558eb404b1>



SHRM Regional Teams –Kevin's Role

Member Engagement Associates (MEA)

Are the primary contact for:

- Chapter rosters and member lists; audits
- At-large labels
- Primary Chapter Designation forms
- Auditing and CFSP payment issues
- Any documents you need mailed to you
- Promotional materials
- General questions

Find your MEA at:

<https://community.shrm.org/vlrc/shrm-certification/viewvlrcarticle?DocumentKey=d3976543-ecb7-4898-b0ee-11558eb404b1>

Housekeeping and Compliance Basics

What are the governance process for your company

Insert chapter logo here

Your new to the role – where do you start

Job descriptions and training of new team – “learn from the old to improve the new”

- If you do not have a formal process – you better create one
- Handoff from one leader to another
- Verbal knowledge, written policies (like travel and signature authority for expense approval) critical governance documents

Contracts and agreements

- Your Charter
- Your By Laws
- Chapter management services
- Web hosting services
- Conference/hotel contracts

Insert chapter logo here

Obtain and review critical documents

Tax filings – trust but verify

- Obtain the past 2 year tax returns
- Understand who is responsible for filing and reviewing tax forms
- Do a GuideStar Search – if you don't find your self – keep digging

Bank accounts –

- Where are they
- Who has account and signature authority
- Update security access and passwords
- Close out the year – make it part of the handoff

Insert chapter logo here

Your new to the role – where do you start

Website review

- Are you relevant, compelling, clear call to action and the ability to execute on obtaining revenue

Review of social media sites

- Permissions, fresh content relevant to your mission

Insert chapter logo here

Is everybody ready to lead...



It is imperative that every member of the board – the body that carries the fiduciary responsibility for the organization:

- Understands the organization's mission
- Has reviewed the governing documents and finances
- Has a high level of confidence that the finances are being properly managed.

Insert chapter logo here

Housekeeping Items - Requirements

Chapters

- ❖ Bylaws – Annual review by chapter
- ❖ SHRM Affiliate Program for Excellence (*SHAPE*)
 - ❖ ***Due: January 31, 2020***
- ❖ Annual Audits
 - ❖ In-Chapter Members vs. At-Large Members
 - ❖ Local Members Only (LMOs)
- ❖ Chapter Leader Information Form (CLIF)
 - ❖ ***Due: December 1, 2020***
- ❖ Membership Updates
 - ❖ **Final Updates Due: December 15, 2020**
 - ❖ Chapter Designation Forms (CDF)

State Councils

- ❖ Bylaws – Annual Review
- ❖ SHRM Affiliate Program for Excellence (*SHAPE*)
 - ❖ ***Due: January 31, 2020***
- ❖ State Council Leader Information Form (SCLIF)
 - ❖ ***Due: December 1, 2020***

Insert ch

SHRM Chapter Affiliation Requirements

36

<https://community.shrm.org/vlrc/business-operations/chapter-business-operations/chapter-deadlines>

SECTION I: CHAPTER IN GOOD STANDING

1) We will meet and maintain the minimum SHRM chapter membership affiliation requirements pertaining to our chapter.

In the year-end report, you will be asked to verify that you meet and maintain the minimum affiliation requirements based on your chapter's affiliation date as outlined below.

For 100% chapters (chapters requiring SHRM membership to belong to the local chapter):

- ALL chapter members **MUST** be SHRM members in good standing. Non-SHRM member categories are not permitted. 100% chapters are subject to the same minimum membership requirements as stated below for non-100% chapters, depending on the date of the chapter's affiliation with SHRM.
- Chapters that do not have 100% SHRM membership will not be considered 100% chapters and will not receive the benefits of being a 100% chapter.

For non-100% chapters affiliated with SHRM prior to January 1, 2004:

- At least ten (10) SHRM members primarily coded to the chapter or thirty percent (30%) of chapter membership must be active SHRM members, whichever is GREATER.
- Chapters that fall below 10 SHRM members primarily coded to the chapter or below 30% SHRM membership will be at risk of losing their SHRM affiliation.

For non-100% chapters affiliated with SHRM on or after January 1, 2004:

- At least twenty-five (25) SHRM members primarily coded to the chapter or fifty-one percent (51%) of chapter membership must be active SHRM members, whichever is GREATER.
- Chapters that fall below 25 SHRM members primarily coded to the chapter or below 51% SHRM membership will be at risk of losing their SHRM affiliation.

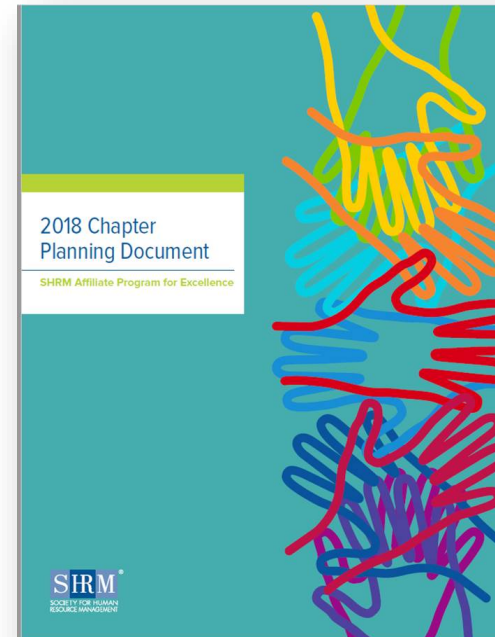
For non-100% chapters affiliated with SHRM on or after January 1, 2012:

- At least twenty-five (25) SHRM members primarily coded to the chapter AND a minimum of fifty-one percent (51%) of chapter membership must be active SHRM members.
- Chapters that fall below 25 SHRM members primarily coded to the chapter and below 51% SHRM membership will be at risk of losing their SHRM affiliation.

Effective January 1, 2017:

- Regardless of affiliation date, the affiliation requirements for ALL non-100% chapters will be at least twenty-five (25) SHRM members primarily coded to the chapter AND a minimum of fifty-one percent (51%) of chapter membership must be active SHRM members.

Check Your Charter



Insert cha

POSTPONED UNTIL
FURTHER NOTICE

Your Chapter's Charter

- Documents the relationship between SHRM and the chapter
- Spells out the legal use of the SHRM name, logo, and acronym
- A copy of our chapter charter is available at SHRM; contact our Member Engagement Associate (MEA)

Your Chapter's Bylaws

- Model SHRM Chapter Bylaws available online in the Volunteer Leaders' Resource Center (VLRC)
- A copy of our chapter bylaws is available at SHRM; contact our FSD or MEA
- Chapter bylaws should be reviewed annually.
- Revisions must be sent to FSD for review and SHRM approval – THIS PROCESS CAN TAKE UP TO 30 DAYS
- Any bylaws changes must be approved by SHRM before the chapter members vote (ratify) or implements the changes
- By laws are reviewed by the SHRM CEO

Campaign in a Box

“Campaign in a Box” 10-min Overview Video


Need a quick walk-through of the newest resources on the VLRC?

- Watch this (less than 10-minute) video of the latest tool created for SHRM Volunteer Leaders.
- The video reviews the “Campaign in a Box” tools, how to navigate the VLRC and more:

<https://community.shrm.org/vlrc/viewdocument/campaign-in-a-box-overview>

<https://community.shrm.org/vlrc/membership/campaign>

Campaign in a Box



SHRM in 2019

Better Workplaces. Better World.

DESCRIPTION

SHRM engages in national conversations on significant issues in today's headlines that are having a real-life impact on employees and employers every day: the skills gap, employment-based immigration, workplace harassment and more. As a SHRM chapter or state council, this is your opportunity to join and amplify the conversation around the most important issues challenging the workplace and its workers. Help us spread the word about the impact of HR on the most pressing issues in the workplace today using the tools provided below. The campaigns below cover important issues facing work, the worker and the workplace, but also the ways in which SHRM is committed to creating positive change in the workplace. These include, the Getting Talent Back to Work pledge, SHRMLive and the What Happens at Work Panel Livestream.

TIMELINE

SHRM's on-going commitment to creating better workplaces for a better world.

HASHTAGS

#WeAreWork | #SHRM

SHRM Membership	Better Workplaces. Better World.	Getting Talent Back to Work Pledge
Closing the Skills Gap	Fixing Employment-Based Immigration	Improving Workplace Healthcare
Workplace Harassment	We Are Work	SHRMLive
SXSW Voting Campaign	SHRM Affiliate Logos	Member Benefits

SHRM Affiliate Logo-in-a-Box Toolkit

<https://community.shrm.org/vlrc/membership/campaign>



PLEASE UPDATE YOUR LOGOS

Check out the just-posted “**SHRM Affiliate Logo-in-a-Box**” toolkit, hosted on the “Campaigns-in-a-Box” page on the VLRC.

The various formats will assist you with co-branding for your upcoming events and materials.

In addition, check out a new video from SHRM’s Johnny C. Taylor, Jr.!



YES

SHRM Affiliate Logo-in-a-Box Toolkit

<https://community.shrm.org/vlrc/membership/campaign>



Requires additional
permission



NO



YES

SHRM Affiliate Logo-in-a-Box Toolkit

<https://community.shrm.org/vlrc/membership/campaign>



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Do's and Don'ts of Chapter or Council Logos

- **Do** use either “SHRM” or “Society for Human Resource Management” in your logo (i.e., the one that is in the legal name or ‘also known as’ name in your bylaws).
- **Don't** use a conjoined H and R (their spines touching) when using the SHRM acronym.
- **Do** use your chapter logo in conjunction with the SHRM AFFILIATE OF logo and not as a substitute for the SHRM AFFILIATE OF logo.
- **Ensure** that “SHRM” and “Society for Human Resource Management” are treated the same as the rest of your chapter/state council's name. Same font size, color, style.
- **Do NOT** register any “SHRM” or “Society For Human Resource Management” logo in any federal or state trademark office.
- Additional details on the creation and usage of Chapter or Council logos can be found in the SHRM Affiliate Logo-in-a-Box” toolkit, hosted on the “Campaigns-in-a-Box” page on the VLRC.



Why use the SHRM logo at all?

Because we are partners and together we win!

A fast-food analogy McDonald's 

- Would you be a part of a great brand like McDonald's, but not use the Golden Arches for your franchise?

The SHRM logo should be viewed as the equivalent

- SHRM invests substantial time and money in building the strength of the SHRM brand
- We want you to leverage these efforts and use the AFFILIATE OF logo properly; this only sets up chapters and councils for success



Your Role and Who Does What

Chapter>CalSHRM>SHRM

Roles and Who Does What

State Councils

- ❖ State Council Director – Main Point of Contact
 - ❖ *State Council Director-Elect*
- ❖ Management Professional - CMP
- ❖ Membership Director
- ❖ College Relations Director
- ❖ Certification Director
- ❖ District Director(s)
- ❖ Secretary
- ❖ Treasurer

Chapters

- ❖ Chapter President – Main Point of Contact
 - ❖ *Chapter President-Elect*
- ❖ Management Professional - CMP
- ❖ Membership Director
- ❖ College Relations Director
- ❖ Certification Director
- ❖ Secretary
- ❖ Treasurer

Expectations for All Board Directors

Governance

- Know and understand the purpose of the chapter charter
- Know and understand the purpose of the chapter bylaws
- Know and understand what constitutes a quorum for board decisions
- Review *Roberts Rules of Order*

Planning

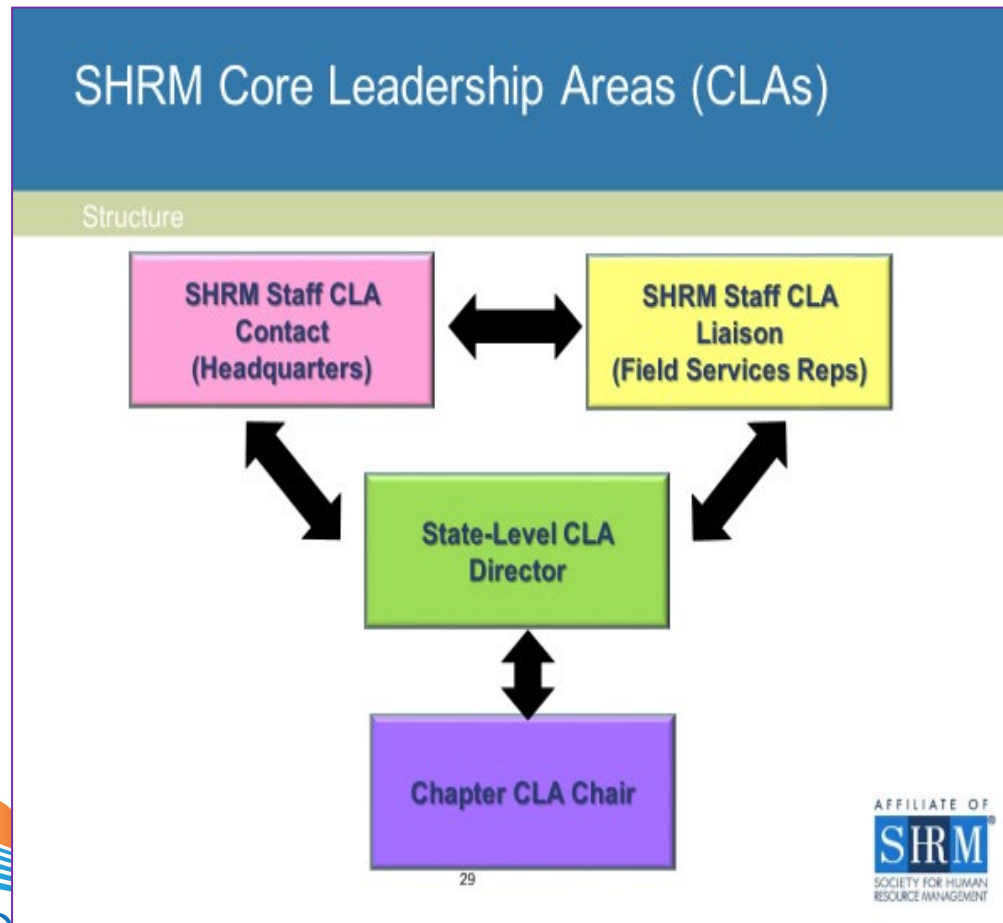
- Be present and engaged in chapter board meetings
- Participate in setting goals and carrying out plans for your specific area (organizational goals)
- Develop specific area objectives for the year (maintenance goals)

Budgeting

- Develop specific area annual budget
- Make sure you have “Controls”
Operate responsibly within that budget
Track and report

SHRM Core Leadership Areas (CLAs)

Seven CLAs



Membership
SHRM Foundation
College Relations
Diversity
HR Certification
Government Affairs
Workforce Readiness

SHRM Resources for CLA Volunteers

Volunteer Leaders' Resource Center (VLRC)

VLRC

SHRM's Volunteer Leader Resource Center

www.shrm.org/vlrc

LEADERSHIP ▾ MEMBERSHIP ▾ BUSINESS OPERATIONS ▾ SHRM CERTIFICATION ▾ AWARDS/SCHOLARSHIPS ▾

Term / Keyword / Phrase

Webinar Schedule

Ongoing and
Archived Webinars
for each CLA

To access the registration link or recording link for any webinar click on the webinar title below. Each webinar can be accessed any time after the scheduled session. There is no call in number for webinars and technical assistance will be provided during the session via the Q&A function on the console. For questions regarding all CLA webinar please contact Communications Manager Bailey Yeager at bailey.yeager@shrm.org.

Q1 Core Leadership Area Webinar Schedule

Resources for each CLA

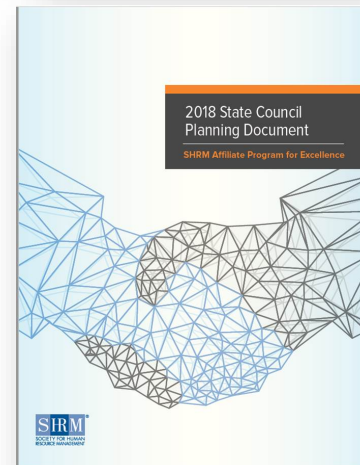
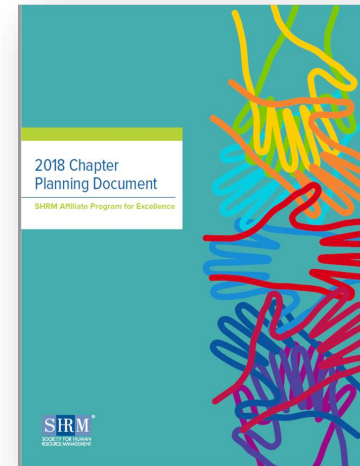
Webinar Title and Registration Link	Date	Time
Student Programs CLA Webinar	Friday, February 2, 2018	2:00pm EST
SHRM A-Team/Government Affairs CLA Webinar	Thursday, February 8, 2018	4:00pm EST
SHRM Workforce Readiness CLA Webinar	Tuesday, February 20, 2018	4:00pm EST
SHRM Certification CLA Webinar	Wednesday, February 21, 2018	4:00pm EST
SHRM Membership CLA Webinar	Thursday, February 22, 2018	4:00pm EST
SHRM Northern California Community Webinar	Tuesday, February 27, 2018	12:00pm EST
SHRM Diversity CLA Webinar	Wednesday, March 7, 2018	3:00pm EST
SHRM Northern California Community Webinar	Thursday, March 29, 2018	12:00pm EST

SHRM Affiliate Program for Excellence (SHAPE)

All SHAPE resources are available on the VLRC

- 2020 SHAPE Workbook for Chapters & State Councils will be available soon
- Online Year-End Reporting Tool
- 2020 SHRM Excel Awards brochure will be available soon

www.shrm.org/vlrc



SHRM Affiliate Program for Excellence (SHAPE)

All SHAPE resources are available on the VLRC

SHAPE Planning Workbook

- Use as a planning tool for your chapter and state council
- 2019 SHAPE Year-End Report is due on or before January 31, 2020
- Review at each meeting to assure initiatives are on track
- Look to the SHAPE Center on the VLRC for resources: www.shrm.org/vlrc

The SHRM Excel Awards application is separate and distinct from the SHAPE program.

Money from SHRM for Your Chapter

Chapter Financial Support Payment (CFSP) Program

Eligibility Criteria

SHRM pays chapters and state councils several millions of dollars each year in financial support.

Chapter Financial Support Payments (CFSP)*

❖ Non-100% Chapters – 2x Year

\$5.00 for each Professional SHRM member primarily coded to the chapter.

❖ 100% Chapter – Quarterly

\$6.25 for each professional SHRM members primarily coded to the chapter.

❖ Net Gains

Calculated by subtracting the 12/31 national membership total for last year from the 12/31 national membership total for the current year and multiplying the difference by \$25.00.

**All chapters must be in good standing to be eligible for CFSP.*

- Submit a completed SHAPE Year-End Report by 1/31 of each year and your membership roster when requested.
- Meet the applicable membership affiliation requirements.
- Have a chapter president who is a SHRM member in good standing throughout his/her term of office.
- Have SHRM-approved ratified bylaws on file at SHRM.

Chapter Financial Support Payment (CFSP) Program

Net Gains formula

❖ Net Gains

Calculated by subtracting the 12/31 national membership total for last year from the 12/31 national membership total for the current year and multiplying the difference by \$25.00.

Example:

**Chapter's
12/31 SHRM
Membership Count**

2019 year-end	250
2018 year-end	<u>-200</u>
Difference	50

Net Gain Payment (50 X \$25) = \$1,250

Must be a chapter in good standing to be eligible for payment

Marketing Support from SHRM



Chapter Promotion

<https://community.shrm.org/vlrc/resources-shrm/viewvlrcarticle?DocumentKey=c3c0e69d-051b-4ee0-8d22-86e70c4adeb2>

Chapter Promotion Email Program (CPEP) will help you market your chapter to your SHRM at-large members

- Promotes chapter membership and events to SHRM at-large members in your local area
- Available to chapters in good standing with SHRM who do not otherwise qualify for the SHRM e-blast program (100% and Super Mega chapters)
- Chapters provide event information and SHRM provides text promoting the value of chapter membership
- ***Chapters may request two emails sent on their behalf within a calendar year (think 25,000+ vs 7,900)***
- Contact your Member Engagement Associate (MEA) for additional information

Insert chapter lo



Chapter Promotion

<https://store.shrm.org/books-resources/accessories/affiliates-of-shrm.html>

Co-Branded SHRM-Affiliate Accessories

Visit the SHRM Store for more information



Need Help with Programming SHRM Can Help

2020 Chapter Programming

2019 Chapter Programming

<https://community.shrm.org/vlrc/shrm-certification/competency>

SHRM Competency-Based Education for Chapters

- Series of 1.5 hour programs to address topics based on the SHRM HR Competency Model
 - Free of charge for SHRM Chapters and Councils in good standing
 - Multi-Media presentation
 - Includes easy to use facilitator guide
 - Accessible via the VLRC



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2019 Chapter Programming: Competency-based Workshops

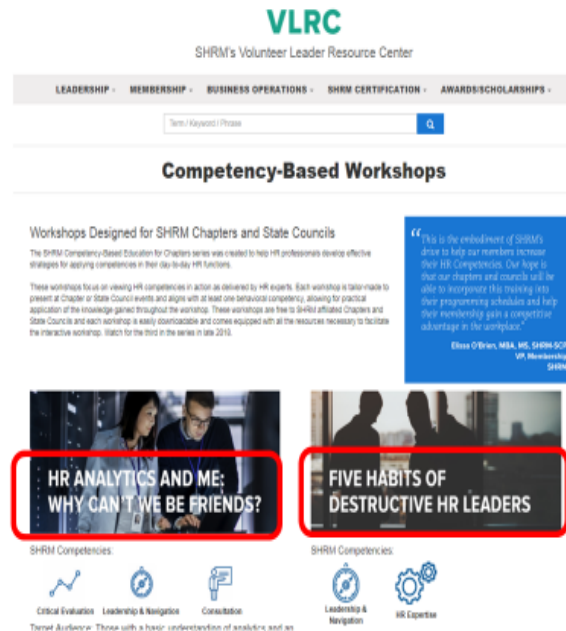
44

Planning your Programming for 2019?

Complete the online
request form on the
VLRC to access the
workshop materials

<https://community.shrm.org/vlrc/shrm-certification/competency>

Insert chapter
logo here



SHRM SPEAKERS BUREAU

LET OUR DYNAMIC SPEAKERS BRING YOUR HR STRATEGIES
AND BUSINESS CONCEPTS TO LIFE.

Feedback

Need A Speaker?

SHRM offers a wide variety of top tier speakers whose knowledge and expertise will help your team of professionals thrive. Request a speaker from the SHRM Speakers Bureau, and have an expert come to you to discuss employment and workforce issues.



BOOK A SPEAKER

Are you hosting an event and looking for a dynamic, thought-provoking storyteller? View our list of workforce subject matter expert speakers.

[BOOK SPEAKERS](#)



AFFILIATE OF
SHRM
SOCIETY FOR HUMAN
RESOURCE MANAGEMENT

SPEAKERS FOR AFFILIATES

Are you a SHRM chapter or state council looking to bring a fresh perspective to your members? View our list of bold, forward-thinking SHRM speakers.

[BOOK SPEAKERS](#)

Feedback

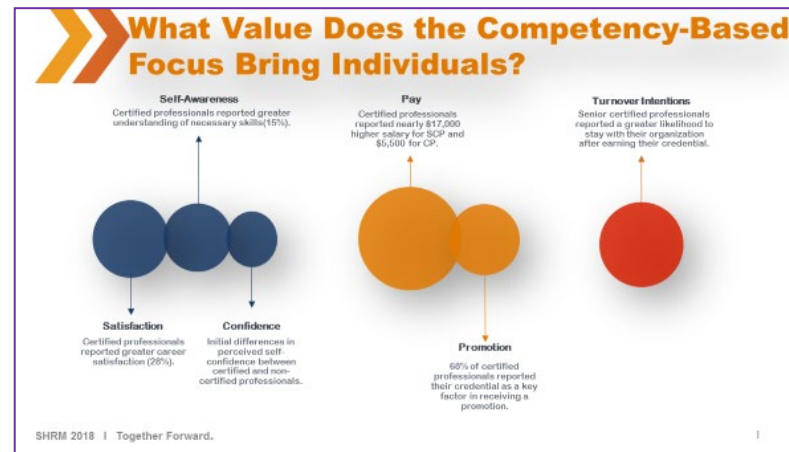
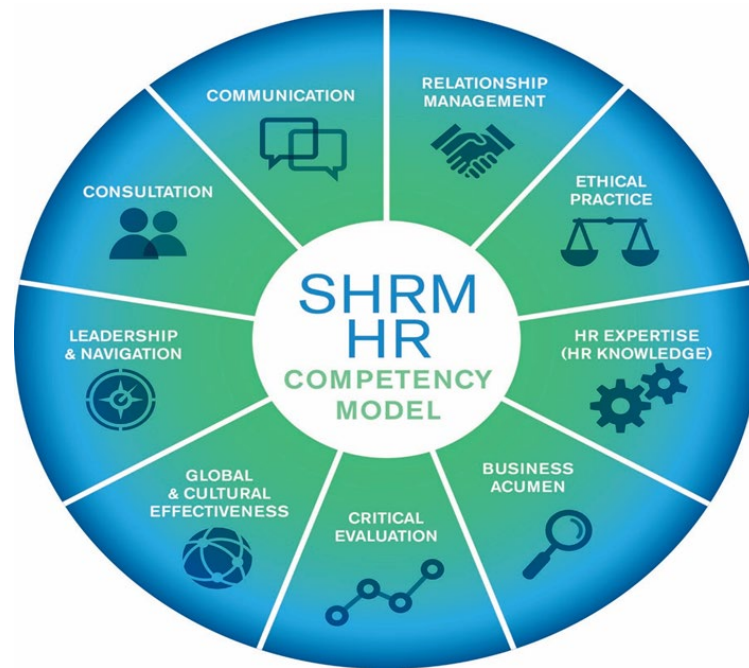




SHRM Certification



SHRM-CP / SHRM-SCP Certification



Insert chapter

SHRM 2018 | Together Forward

SHAPE Section II; Item 6:

We will actively promote SHRM Certification and Recertification for the SHRM-Certified Professional (SHRM-CP) and SHRM-Senior Certified Professional (SHRM-SCP) by obtaining and/or maintaining the SHRM Recertification Provider status and ensuring that all relevant programs are entered into the online SHRM program database for Professional Development Credits (PDCs).



SHRM Recertification Provider Program

- No submission timing requirements
 - Session can be promoted as soon as course details are entered
- “Activities” search functionality
 - Via recertification portal
 - Via mobile app



**2020 SHRM Recertification
Provider Program Guide**



Insert chapter lo

SHRM Recertification Provider Program

<https://community.shrm.org/vlrc/viewdocument/recert-seal-jpeg>

Please use the approved SHRM Provider seal AND approved statement on any collateral.



Recertification Providers must complete the 2020 Reaffirmation process by **November 15, 2019.**

Once you have complete the **2020 Reaffirmation process,
you will receive the new 2020 seal.**



SHRM Recertification Provider Program

Approved Full Statement

“**[Name of Chapter]** is recognized by SHRM to offer Professional Development Credits (PDCs) for the SHRM-CP or SHRM-SCP. This program has been approved for **[XX] PDCs** for the SHRM-CP or SHRM-SCP. For more information about certification or recertification, please visit www.shrmcertification.org.”

Approved Abbreviated Statement

“This program has been approved for **[XX] PDCs** for the SHRM-CP or SHRM-SCP.”

Insert chapter lo

SHRM Recertification Provider Program

Additional information is always available on the SHRM website:
<https://www.shrm.org/certification/orgs/RecertificationProviders/Pages/default.aspx>

Please contact the SHRM Recertification Provider Team directly with
any additional questions

RecertificationProvider@shrm.org
+ 1 (703) 535-6250



Insert chapter lo

SHRM SPECIALTY CREDENTIALS

Declare your specialty and stand out from your peers.



PROVE

that you're a strategic talent acquisition partner.



USE

people-related data to impact business decisions.



DECLARE

your specialty California HR Law.



DEMONSTRATE

your individual impact on your organization by elevating HR.



DISTINGUISH

yourself by demonstrating your comprehensive workplace immigration knowledge.



EXHIBIT

your ability to influence, drive and sustain an inclusive workplace culture.

shrm.org/specialtycredentials



Chapter Awards You Can Earn from SHRM

SHRM Award Programs

- **SHRM Pinnacle Award Program**

An annual recognition program honoring the highest achievements in chapter and state council development and contributions that serve HR professionals, advance the HR profession and enhance the SHRM community. Our chapter is encouraged to apply for a Pinnacle Award for innovative projects created and implemented by our chapter.

Application Window: June 1 - September 1

- **SHRM Excel Award Program**

SHRM strongly encourages each of its affiliated chapters and state councils to establish goals and strategic initiatives in support of the HR profession and to meet the needs of HR professionals. These goals and initiatives allow our affiliates to increase their visibility and effectiveness as well as expand impact within the HR community, and are the basis for SHRM's Excel Awards.

Application Deadline: March 15

<https://community.shrm.org/vlrc/home>



SHRM Staff – Your California Team

Divisional Director and Member Engagement Associate



Jon Decoteau, SHRM-SCP
Divisional Director – West
Jon.Decoteau@shrm.org



Kevin Abbed
Member Engagement Associate
(MEA)
AK, AR, AZ, CA, CNMI, CO, Guam,
HI, ID, KS, LA, MT, NM, NV, OK,
OR, TX, UT, WA, WY
Kevin.Abbled@shrm.org



VOLUNTEER



Leadership

SUMMIT

Making an Impact Through Advocacy

Michael S. Kalt, Government Affairs Director, CalSHRM

mkalt@wilsonturnerkosmo.com



2019 Overview

- CalSHRM “One Voice” Newsletter/Legislative Update
- Social Media
 - Michael S. Kalt - @michaelKalt_law
 - Jason Gabhart - @SHRMCAJason
 - CalSHRM - @CalSHRM
- Position / Coalition Letters
- Committee Testimony
- “Call to Action” re: AB 160
- PAGA Reform Group

Position Letters

Bill	CalSHRM Position	Result
AB 51 [Arbitration Ban]	Opposed	Signed
AB 152 [Student Loan Repayment]	Supported	Passed Committees but stalled Appropriations
AB 160 [Vets Hiring Preference]	Supported	Passed Assembly but stalled in Senate Judiciary
AB 171 [Labor Code “Sexual Harassment”]	Opposed	Vetoed
AB 555 [Paid Sick Leave Increases]	Opposed	Stalled
SB 135 [CFRA Expansion]	Opposed	Stalled
SB 171 [Pay Data Reporting]	Opposed	Stalled
SB 778 [Harassment Training Clarifications]	Supported	Signed by Governor Newsom

Coalition Letters

Bill	Coalition Position	Result
AB 403 [Increased Statute of Limitations]	Opposed	Vetoed
AB 589 ["Workers Bill of Rights"]	Opposed	Vetoed
AB628 [Retaliation Presumption]	Opposed	Stalled
SB 218 [Removing FEHA Preemption]	Opposed	Vetoed

“Call to Action” re: AB 160

- Would permit voluntary hiring preference regarding veterans
- CalSHRM / SHRM position: **SUPPORT**
- “Call to Action” issued June 19, 2019 (Thank you, PIHRA!)
- Final vote: 4 – 3 – 2 (Failed passage . . . for now)
- Reconsider in 2020?

PAGA Reform Group

- Advocacy conference discussion
- Post-conference meetings with SHRM / CalSHRM, businesses and Assembly Members
- In September 2019, CalSHRM submitted list of suggested regulatory / statutory changes
- CalSHRM proposal re: “cure” notices being introduced by Assemblyman Fong

CalSHRM Proposed Bills

- CalSHRM Proposed Bills:
 - Investigations Reform (Legislative Counsel Drafting)
 - PAGA “Cure” Notices (Assemblyman Fong Introducing)
 - Student Loan Repayment Assistance (Hold Until 2021)
 - Veterans Hiring Preference (Hold Until 2021)
 - Consistency in Records Inspections Deadlines (Being Considered)

2020 Legislative Calendar

- February, 21 2020 - New Bills Deadline
- April 15, 2020 - Advocacy Day
- May 29, 2020 (approx.) – First Chamber Deadline
- August 31, 2020 (approx.) – Second Chamber Deadline
- September 30, 2020 (approx.) – Governor to Sign Bills

How You Can Help Make An Impact

- Have a Legislative Director
- Legislative Director Job Duties
 - Attend Legislative Conference
 - SHRM “Advocacy at Work” (March 15-17, 2020 in Washington D.C.)
 - CalSHRM “HR Advocacy and Legislative” (April 15-17, 2020 in Sacramento, CA)
 - In-District Meetings
- Anticipate Legislative Deadlines
- Ensure Current / New Legislative Director Contact Information

Sponsorship Introduction

ScholarShare529  SM



CalSHRM Overview & Review of Resources

Presented by: CalSHRM District Directors

DD North - David Conmy, DD Central – Laura Hill, DD South – Andy Covell



What we will cover:

- Who is CalSHRM, what is our purpose?
- What role does CalSHRM play in the National SHRM Structure and how does this help you and your members?
- What do I have to do as a member of the board and how can CalSHRM help me in my role as president? (or in any other role on your board)
- How does CalSHRM Support You?



Who is CalSHRM?

The California State Council of SHRM or CalSHRM is the state affiliate for SHRM, representing a professional community of more than 25,000 SHRM members and the 120,000 + HR practitioners in the state.

- 100% volunteer organization
- 16 SHRM affiliated chapters and 1 SHRM Community
- Primary objective is to support the mission and initiatives of SHRM & our California Chapters



CalSHRM's Vision and Mission

Vision Statement:

“CalSHRM endeavors to be the premier resource for the California HR Professional”

Mission Statement:

“CalSHRM advances the HR profession and serves the HR professional through membership development, brand awareness and public policy/advocacy”



CalSHRM's Value Statements

Leadership: We are committed to providing and promoting strong leadership through mutual trust, respect, and strategic mechanisms that drive success

Relationships: We are dedicated to building dynamic relationships with our Local Chapters, State Council members and SHRM, by working side-by-side and delivering solid business value to them

Collaborate: We promote synergy by working in partnership toward shared goals, shared information, and fully aligning mutual interests

Supportive: We are devoted to the success of our Chapters and SHRM through steadfast support and encouragement of members

Service: We deliver outstanding service to Local Chapters, the State Council, SHRM and our Communities through devoted volunteers.

Community: We contribute to our HR community through purposeful actions and initiatives that demonstrate our values



How do WE support you?

As a consolidated California community, CalSHRM coordinates professional development efforts, legislative advocacy, and serves as the conduit for communication among SHRM and chapters as well as SHRM at-large members.



How is CalSHRM Structured?

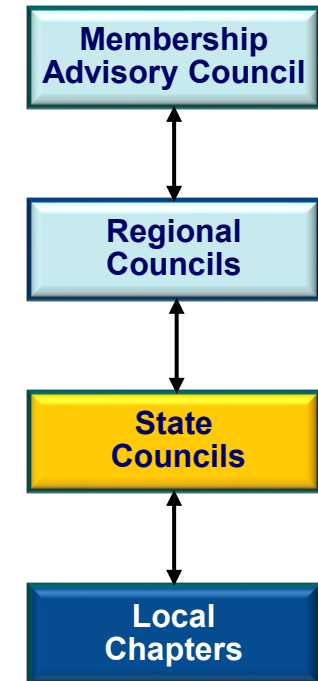
Our team consists of:

- Elected board members. All positions are elected by the Council board & Chapter Presidents.
- The Presidents of each of the 16 California SHRM chapter that range in size from 40 members to nearly 5,000 and cover three geographic district areas across CA.
- All of the CalSHRM leaders are “experienced chapter board members” and “business leaders” from across the state with experience managing volunteer & professional organizations.



What is a State Council?

- Each state is governed by a state council with a State Council Director, who reports up to a Regional Council.
- Structure for key volunteer leaders in the state to adopt and promote SHRM initiatives
- Serves all HR professionals in the state, by promoting chapter membership and local professional development
- State councils engage in activities that raise the visibility and credibility of the HR profession and SHRM in the state.



What we do...

- Track CA legislation and its potential impact on the workforce to provide legislative updates to chapters and affiliates.
- Support volunteer leadership in chapters
- Sustain and increase membership in chapters with an emphasis on reaching the SHRM at-large members.
- Provide resources to local chapters



How we do it...

Quarterly Board Meetings

- 4 quarterly meetings a year
- 1 day event
- Held across the state
 - San Diego, Sacramento, San Jose, Orange County



How we do it...

Newsletters

- Informative Quarterly Newsletter
- Initiatives
- Educational Programming
- Statewide Events (Your programming)
- Leadership Opportunities & More!



ONE VOICE

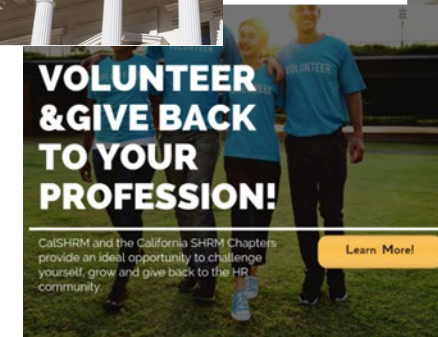
CalSHRM is committed to advancing the HR profession, knowing that together we can influence change. We provide several platforms for HR professionals and business to stay up-to-date legislative issues and raise awareness with government leaders including a state conference and quarterly newsletter.

[Learn More](#)

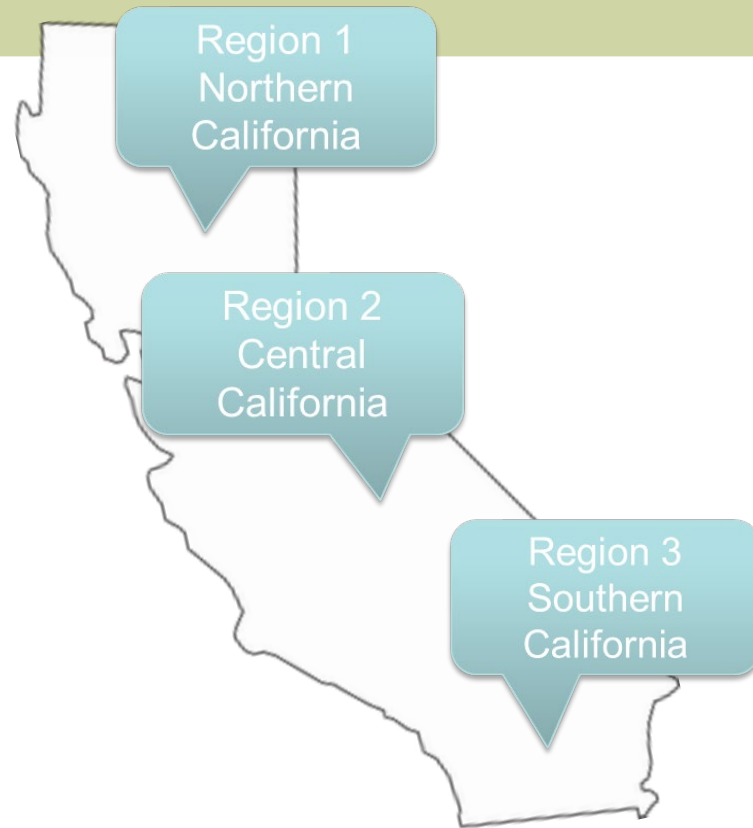


How we do it...

- Strategic Planning
- Meaningful Initiatives
- Making a Difference in California!



How we do it...



District Directors

- Three (3) District Directors
- Resource for Chapters
- Divided into Three (3) Regions

How we do it...

- Core Leadership (CLA) & Council Directors
 - Membership
 - SHRM Foundation
 - College Relations
 - Diversity
 - HR Certification
 - Government Affairs
 - Workforce Readiness



I am a Chapter President...

What is my role with CalSHRM & how does it benefit me, my chapter and members?

- ✓ **VOTE!** Actively engaging with CalSHRM allows you to shape and structure the future of Human Resources in the state!
- ✓ **ENGAGE!** How better to improve your members' (and your) experience by engaging with CalSHRM and other chapters.
- ✓ **MAINTAIN YOUR SHRM AFFILIATION STATUS!** Presidents (or their board designee) are asked to attend a minimum of 3 meetings per year (75%) required to maintain SHRM affiliation.
- ✓ **DEVELOP AND ENGAGE YOUR CHAPTER LEADERS!** Help connect your chapter leaders to their respective CalSHRM Core Leadership Directors for continued contact and support.



Chapter Presidents working with CalSHRM

- ✓ **PROMOTE!** SHRM Annual Conference, SHRM Foundation, CalSHRM Legislative Conference, Certification, State and National SHRM Webinars, conference calls and initiatives. We are here to improve the profession and our members!
- ✓ **BE ACTIVE!** Participate in breakout sessions with District Directors, CLA, Council Directors, SHRM staff and other Presidents at CalSHRM meetings and everyday. Come prepared to discuss chapter successes and challenges and be willing to proactively problem solve.
- ✓ **LEAD YOUR BOARD!** Encourage your President Elect and other Chapter leaders to attend Quarterly CalSHRM Meetings whenever possible. It is great succession planning.
- ✓ **DEVELOP YOURSELF!**



What will CalSHRM Cover?

- For each quarterly meeting (Q2, Q3 and Q4) that a chapter representative is in attendance, CalSHRM will pay for:
 - Hotel accommodations (1-night)
 - Parking
 - Friday social
 - Food & Beverage for the meeting
- For each quarterly meeting (Q2, Q3 and Q4) that a chapter representative is in attendance for the full meeting the chapter will get:
 - 1 VLS registration, maximum 3 registrations per chapter
 - Hotel accommodations (1-night)
 - Friday social
 - Food & Beverage for the CalSHRM VLS

Resource Review...

SHRM 2020 Shape Planning Document & Checklist of Chapter Activities (covered by Jon Decoteau) and available on the SHRM VLRC

- <https://community.shrm.org/vlrc/home>



SHRM Chapter Activities by Month			
<p>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 issues 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.</p>			
	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).• 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 PSD to speak at a session. Also offer your PSD 10-15 minutes of time at the podium to address the full group. PSD should have a prime/visible booth location if you have an exhibit hall. (Required in SHAPE)• Notify your Field Services Director (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 Regional Administrator. Keep SHRM informed of any changes to e-mail addresses, contact information, and role changes as they occur.	<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 members are aware of the membership resources available from SHRM.• Mark your calendars for key events during the year, such as the conference calls for chapters by size, Core Leadership Area (CLA) calls and webinars, state council meetings (chapter presidents should attend these meetings), state leadership events, SHRM conferences, 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.• Super mega and 100K chapters are allowed two e-blasts per quarter to promote their activities to all SHRM members in the chapter's ZIP code range. Complete the online request form in the VLRC.	<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.• Review the chapter's charter with your board (if you cannot locate this document, you can request it from your RA at SHRM).• Provide the Guide to Financial Management to treasurer and other key volunteers (all should review it).• Check the Leadership blog for news and updates from SHRM.• 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 info about your volunteer role.

Resource Review...

And your greatest resources....the people around you!



Jennifer Thomas,
North State
SHRM



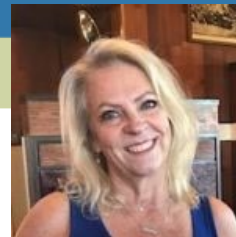
Brandon Perry,
Sierra HRA



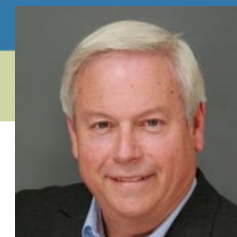
Christine Hoxsie,
Sierra HRA



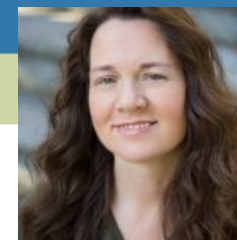
Carrie Schleicher,
SAHRA



Linda Fermin,
SJ SHRM



David Swanson,
BAHREC



Christina Alger,
CVHRMA



Nancy Scholink,
CCHRA



Rhonda May,
CCSHRM



Shelly Little,
SHRM Tulare
Kings



Laura Hill,
KC SHRM



Sharon Brown,
SBHRA



Patti Sprinkle,
PIHRA



Heather Whitley-Quinn,
SD SHRM



Lora Hassani,
IE SHRM



Rebecca Lewis,
SCWC SHRM



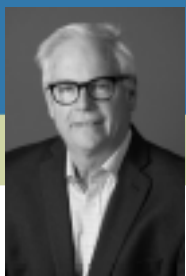
Jorge Reyes,
IVHRA



Resource Review...And your greatest resources....the people around you!



Trisha Zulic,
State Director



David Swanson,
State Director Elect



Mike Letizia,
Past State Director



Lissa Cardenas,
Treasurer



Christine Rodman,
Secretary



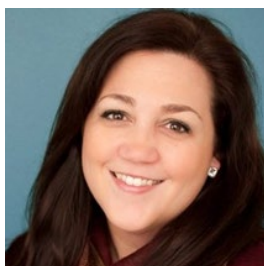
David Conmy,
District Director - North



Laura Hill,
District Director - Central



Andy Covell, District
Director - South



Tara Fournier,
Membership Director



Susie Couture,
College Relations Director



Michael Kalt,
Gov't Affairs Director



Michael Garcia,
Certification Director



Julie Worley,
Professional Development
Director



Brad Weinstein, Workforce
Readiness Director



Gil Manzano,
D & I Director



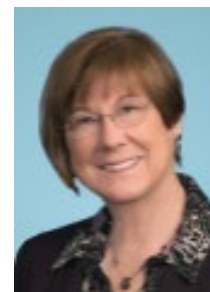
Meisha Sherman,
Foundation Director



Jason Jones,
Business Development
Director



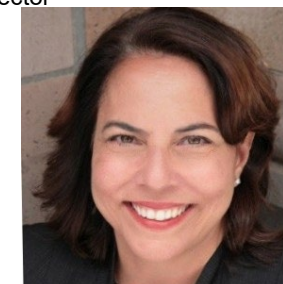
Nancy Nelson,
SAGE



Linda Magyar,
SAGE



Jon Decoteau,
Divisional
Director - SHRM



Gina Allyon,
Executive Director –
SHRM NorCal



Jason Gabhart,
CA State Affairs
Director - SHRM

Thank you for coming!



District Director – North
David Conmy, SHRM-SCP,
GPHR
ddnorth@calshrm.com



District Director – Central
Laura Hill
ddcentral@calshrm.com



District Director – South
Andy Covell, SHRM-SCP, SPHR
ddsouth@calshrm.com



VOLUNTEER



Leadership

SUMMIT

CalSHRM Mini Board Meeting



CALIFORNIA
STATE COUNCIL OF SHRM



CalSHRM Speed Dating

- ▶ Meet Core Leaders at CalSHRM
- ▶ 5 minutes with Each Leader
- ▶ Find out What they Do & How it Can Benefit your Chapter
- ▶ Located in all three rooms - Topaz, Pearl and Ivory
- ▶ Two Truths and One Lie...what is the Lie?
- ▶ Prizes for Three Winning Teams



CALIFORNIA
STATE COUNCIL OF SHRM



Adjourn for Dinner Reception & Saturday

- ▶ Coast Restaurant, Lobby Level
 - ▶ 5:45 PM - 7:30 PM
- ▶ Start Again Tomorrow Morning at 8:30 AM for Breakfast - This Room, Topaz



CALIFORNIA
STATE COUNCIL OF SHRM





VOLUNTEER



Leadership

SUMMIT

CalSHRM Volunteer Leadership Summit: Day 2



CALIFORNIA
STATE COUNCIL OF SHRM



Sponsorship Introduction



CALIFORNIA
STATE COUNCIL OF SHRM



AFFILIATE OF

Breakout Sessions

- ▶ Membership
- ▶ Finance
- ▶ Certification
- ▶ Governance
- ▶ Workforce Readiness
- ▶ Please Note Room for Speakers



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Lunch at 12 PM: Pool Deck West



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Sponsorship Introduction



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Keynote Presentation: How to Apply Strategic Engagement Principles in your Workplace & in your Chapter

- ▶ Guest Speaker: Kevin Sheridan
- ▶ Best Selling Author - Kevin's writing on employee engagement and effective management has been featured on six best seller lists, including the New York Times, The Wall Street Journal and USA Today
- ▶ Keynote Speaker: As a leadership speaker and an HR employee engagement speaker, Kevin's presentations inspire leaders around the world to take control of their culture and performance.
- ▶ Leadership Consultant: The country's largest brands and most high-profile executives regularly call on Kevin to develop leadership skills, help executives reach their full potential, and increase productivity.



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Resources and Speakers for your Chapter Programs

Julie Worley, Professional Development Director, SHRM-SCP,
SPHR, PHRca

prodev@calshrm.com



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Professional Development

- ▶ How to design your Chapter's Professional Development activities?
- ▶ What resources are available to find thought-provoking and engaging speakers?
- ▶ How to obtain recertification credits?
- ▶ What are some best practices from other chapters?



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How to design your Chapter's Professional Development programs?

- ▶ Chapter analytics
 - ▶ What certifications do you members hold?
 - ▶ Certified Benefit Professionals (CBP)
 - ▶ Certified Compensation Professionals (CCP)
 - ▶ Certified Staffing Professional (CSP)
 - ▶ SHRM-CP/SCP Certification
 - ▶ Minimum Continuing Legal Education (MCLE)
 - ▶ PHR/SPHR/PHRca
 - ▶ Level of HR related experience
 - ▶ Students/entry level
 - ▶ Mid level
 - ▶ Senior level



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How to design your Chapter's Professional Development programs?

- ▶ Chapter analytics
 - ▶ Survey your members for Professional Development needs/suggestions
 - ▶ HR Technology/Analytics
 - ▶ Inclusion & Diversity
 - ▶ Leadership
 - ▶ Workplace Culture
 - ▶ Workplace Issues
 - ▶ Government Policy



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What is your chapter's philosophy on charging for meetings, seminars, or webinars?

- ▶ Cost of recertification credits vary
 - ▶ In-person speaker/training 1 credit \$149 or above
 - ▶ Webinars 1 credit \$59 or above
 - ▶ What will your chapter charge for PD activities?
- ▶ Speakers Fees
 - ▶ Local members (Attorney's, Senior Professionals)
 - ▶ CalSHRM Speakers Bureau
 - ▶ SHRM's Speakers Bureau
- ▶ Sponsors for programs



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Resources for Professional Development Programs

Name	Topic	Fee	Contact Details	Misc Information/notes
David Conmy	Job Descriptions: Best Practices to Build Talent, Leadership, Effective Compensation & Compliance Practices Compensation Data for Small to Midsize Companies How to get good Wage Data when Your CFO says you have no Budget Compensation 101		david.conmy@zenzileconsulting.com (408) 930.4840	CalSHRM Board Member and Recommended by several Chapters
Jon Decoteau, District Director	all things SHRM	no fee	"jon.decoteau@shrm.org" <jon.decoteau@shrm.org>;	SHRM/CalSHRM
Jason Gabhard	all things Legal and Legislative SHRM	no fee	Jason.Gabhard@shrm.org Christopher C. Hoffman Fisher & Philips LLP Suite 950 4225 Executrive Square La Jolla, CA 92037 858 597 9601	CalSHRM Board, SHRM Legislative Affaires in CA
Chris Hoffman, Attorney at Law	Across the spectrum of Employment Law issues	no fee	choffman@laborlawyers.com Wilson Turner Kosmo LLP 550 West C Street Suite 1050 San Diego California 92101	
Michael Kalt, Partner Turner Wilson Kosmo LLC Chair CALSHRM Legislative Affairs Committee	California Employment Law, Labor and Employee Relations, Supervisor Training, Wage and Hour Law, Professional Employer Organizations - California Legislative initiatives and A Team Activities	no fee	Tel: 619-236-9600 Fax: 619-236-9669 mkalt@wilsonturnerkosmo.com	CalSHRM Board Member and Speaker at Conference
Mike Letizia, SHRM-CP	HR, CalSHRM, SHRM, Labor Laws, California Labor Law	no fee, travel if required	2972 W. Swain Rd. PMB 115 Stockton, CA 95219 866-631-4711 cell 209 951 7069 mike@letiziahrsolutions.com	CalSHRM Board Member



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How to obtain Recertification Credits?

- ▶ SHRM - certification@shrm.org
 - ▶ MCLE - calbar.ca.gov/Attorneys/MCLE-CLE/Requirements
 - ▶ CCP/CBP - worldatwork.org/certification/recertification
 - ▶ CSP - americanstaffing.net/
 - ▶ PHR/SHPR - www.hrci.org/
- ▶ Each group will have their own requirements for submitting sessions for recertification. Allow 6 - 8 weeks to obtain approval prior to the event.



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Chapter Best Practices

- ▶ Provide meaningful content
 - ▶ Meet your members needs
 - ▶ Attract new members with your programs
- ▶ Coach your speaker(s)
 - ▶ Review content of presentation
 - ▶ Inform the speaker about your chapters culture
- ▶ Refresh your programs
 - ▶ Be brave/bold to do something new



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Questions?

Julie Worley

prodev@calshrm.org

888.805.5421 x218



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Closing Remarks



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Membership Strategic Planning 2020

Tara Fournier, Membership Director, SHRM-CP, SPHR

Membership@calshrm.com



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SHRM Membership 101

Key Terms, Reading Reports



SHRM Membership 101: Key Terms

- ▶ At-large Member
- ▶ Local Member Only (LMO)
- ▶ Primary Member
- ▶ Multi-Member
- ▶ Expired Member
- ▶ Student Member
- ▶ 100% Chapter
- ▶ CFSP (Chapter Financial Support Payments)
- ▶ CDF - Primary Chapter Designation Form



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SHRM Membership 101: CFSP

Chapter Financial Support Payments

- ▶ SHRM reimburses the chapters **\$25 per member per year** for 100% chapters (all chapter members are SHRM members) and **\$10 per year per SHRM member** for non-100% chapters.
- ▶ The more SHRM members a chapter has, the more financial support the chapter will receive.
- ▶ If a SHRM member belongs to more than one chapter, *only the primary chapter will receive financial support*. The member determines which chapter is primary and sends a Primary Chapter Designation Form to SHRM headquarters.



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SHRM Membership 101: CDFs

Primary Chapter Designation Form

- ▶ While a SHRM member may belong to more than one affiliated chapter, only one chapter may be designated as that member's primary chapter.
- ▶ A member is free to change that designation as he/she wishes.
- ▶ Primary Chapter Designation Forms (CDFs) are signed directives from the member to SHRM authorizing SHRM to change his/her primary chapter designation.
- ▶ **The CDF is completed by the professional member** -- after they have joined the chapter through the chapter application process -- and submitted via this form. Upon receipt of the executed form, the member's primary chapter will be changed.

https://shrm.formstack.com/forms/shrm_primary_chapter_designation_form



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Planning Tools: SHRM Membership Report

Look Back to Plan Ahead

Chapter Number	Chapter Name	SHRM IN-CHAPTER MEMBERSHIP							SCORECARD INFORMATION					
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0107	Central CASHRM	91	158	170	171	198		40	L	437	16	223		48.97%
0114	Sacramento Area HRA	340	348	370	367	375		27	MG	604	21	208		65.56%
0117	Kern County SHRM	116	119	127	126	130		11	L	353	4	219		37.96%
0130	San Diego SHRM	315	351	360	392	437		86	MG	515	11	67		86.99%
0184	San Joaquin SHRM	154	170	205	194	189		19	M	205	0	16		92.20%
0344	Bay Area HR Exec Cncl	72	63	72	95	108		45	M	108	0	0		100.00%
0393	Central Coast HR Assn.	66	50	54	57	65		15	S	89	1	23		74.16%
0461	Santa Barbara HRMA	110	110	120	121	125		15	M	216	2	89		58.80%
0499	Central Valley HRMA	148	111	105	102	99		-12	M	180	13	68		62.22%
0640	Sierra HR Assn.	23	26	26	26	31		5	S	40	4	5		87.50%
0651	SHRM of Tulare /Kings County	58	53	54	52	55		2	M	119	3	61		48.74%
0669	Northstate SHRM	171	181	188	176	176		-5	M	188	0	12		93.62%
0691	Inland Empire	447	417	420	447	470		53	L	470	0	0		100.00%
0721	Imperial Valley	18	21	20	21	22		1	S	58	1	35		39.66%
0748	So CA Wine Country SHRM	86	96	103	108	135		39	M	135	0	0		100.00%
	Grand Total	3,687	4238	4323	4316	4508	0	270		8038	212	3318		58.72%



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0344	Bay Area HR Exec Cncl	72	63	72	95	108		45	M	108	0	0		100.00%
0393	Central Coast HR Assn.	66	50	54	57	65		15	S	89	1	23		74.16%
0461	Santa Barbara HRMA	110	110	120	121	125		15	M	216	2	89		58.80%
0499	Central Valley HRMA	148	111	105	102	99		-12	M	180	13	68		62.22%
0640	Sierra HR Assn.	23	26	26	26	31		5	S	40	4	5		87.50%
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0461	Santa Barbara HRMA	110	110	120	121	125		15	M	216	2	89		58.80%
0499	Central Valley HRMA	148	111	105	102	99		-12	M	180	13	68		62.22%
0640	Sierra HR Assn.	23	26	26	26	31		5	S	40	4	5		87.50%
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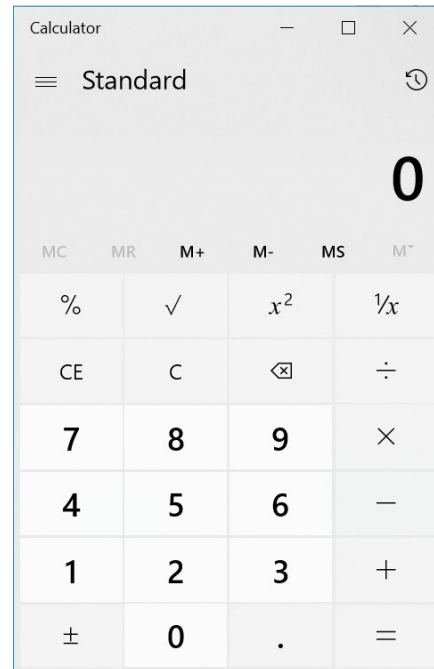
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SHRM Membership 201

Analytics, Calculating Value, Strategic Planning



Get Out Your Calculator!



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Renewal Rate

- ▶ **Renewal Rate** measures the number of members kept over a period of time, usually a fiscal or a calendar year. Renewal rate provides data for other metrics.

Renewal Rate = (Total # of Members today MINUS New Members in the past 12 months) DIVIDED BY Total # of Members in the Previous Year.

$$\text{RR} = \frac{\text{Total Current Members} - \text{New Members}}{\text{Total Members Same Date Previous Year}}$$



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Average Tenure

Average Tenure

Defines how long on average members stay with an association.

Avg. Tenure = $1 / (\text{Inverse of renewal rate})$

Inverse of Renewal Rate = $1 - \text{renewal rate}$ (also known as lapse rate)

Exercise:

Assuming the following renewal rates, calculate average tenure:

Renewal Rate	Average Tenure
90%	
80%	
75%	
60%	



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Value of a Member

Defines the economic value produced by a typical member!

LTV = (Annual Dues revenue per member + annual non-dues revenue per member) * Average Tenure

These helps to determine the level of investment for acquisition!

Exercise:

Calculate Lifetime Value for the following associations:

Association A: Annual dues are \$100, avg. member annual non-dues rev. is \$50 and the association renewal rate is 80%.

Association B: Annual dues are \$160, avg. member annual non-dues rev. is \$75 and the association renewal rate is 75%.



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Growing to Stand Still

Defines the equilibrium of total membership where members gained will offset members lost will be equal.

This projects total members over time assuming new member input and renewal rates remain constant.

$$\text{Steady State} = \frac{\text{Annual New Member Input}}{\text{Lapse Rate}}$$

Exercise:

Calculate Steady State for the following associations:

Association A: 250 new members a year and 80% renewal rate

Association B: 500 new members a year and 75% renewal rate

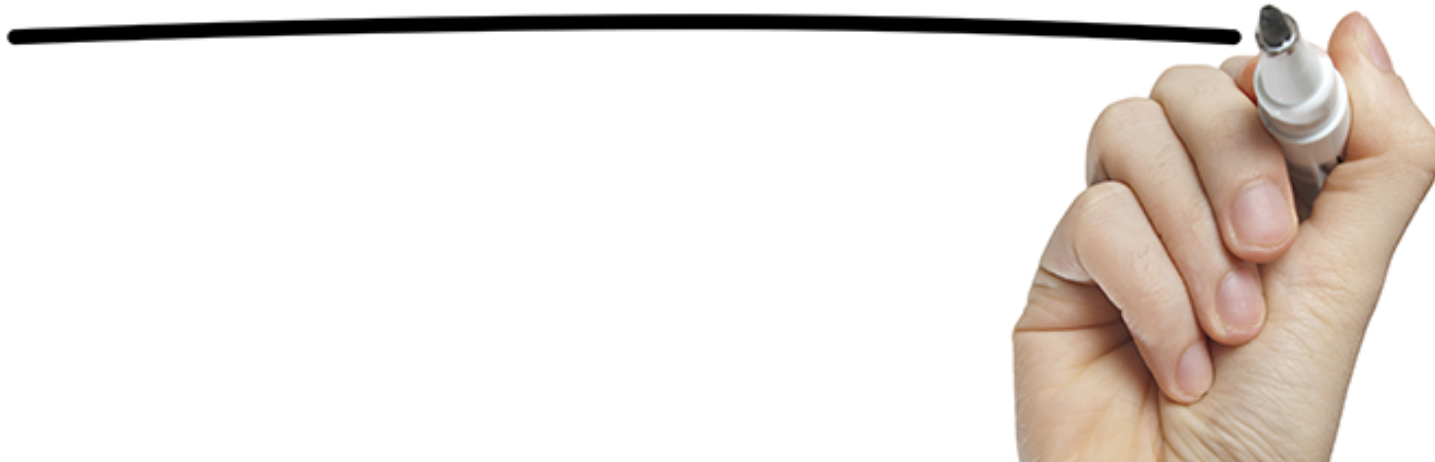


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Takeaways

ACTION PLAN



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2020 CalSHRM Chapter Membership Meetings

SAVE THE DATE!

CalSHRM Membership Web Meetings (specific to California membership needs):

- ▶ February 25 12:00 - 12:45 pm PT
- ▶ April 21
- ▶ June 23
- ▶ August 25
- ▶ October 27
- ▶ December 15



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Contact Information



Tara Fournier, SHRM-CP, SPHR
CalSHRM Membership Director

(E) membership@calshrm.com

(M) 202-415-3869

(W) www.calshrm.org



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Workforce Readiness

Brad Weinstein, Director, SHRM-CP, SPHR, PHRca
workready@calshrm.com



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Speaker Introduction - Brad Weinstein



- ▶ HR Business Partner
- ▶ 20+ yrs various industries - Public Utility, Healthcare, Manufacturing
- ▶ San Diego SHRM Board of Directors
- ▶ Interest in Workforce Readiness



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Workforce Readiness Overview (Portfolio)

Sample Areas -

- Unemployed Entering the workforce (Talent Acquisition)
- College and High School Students Entering the Workforce
- Support College SHRM Chapters & Partnerships
- Military Veterans and Spouses Entering the Workforce
- Support of Disabled Veterans and Civilians in the Workforce
- Support of State Agencies (Employment Development Department)



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“

“While we have made a significant commitment to military hiring, we are only one company, and we of course can’t hire everyone,” So we have broadened our reach and are providing guidance and encouragement to other companies that might be considering hiring from the military community but don’t know where to start.”

”

U.S. Army Brigadier General (Retired) Carol Eggert, Senior Vice President for Military and Veteran Affairs at Comcast NBCUniversal.



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Finding and Sustaining Success Resources Available Immediately

- ▶ Employer Support of the Guard and Reserve (ESGR)
- ▶ The Employer School from PsychArmor Institute
- ▶ Existing Employer Hiring Groups like the Veterans Job Mission, US Chamber Hiring our Heroes, DOD resources
- ▶ SHRM- Veterans at Work Certificate Program
- ▶ LinkedIn's Veterans Program
- ▶ Non-profit organizations
- ▶ IVMF - Syracuse University



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Vice President, Workforce Readiness

... shall oversee the

1. Development AND
2. Maintenance of

Chapter programs that assist members in ...

- ✓ career and
- ✓ job placement.



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Identifying Veteran Employees to Create a Military-Ready Work Environment



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How Automation Will Affect Your Workforce



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Research: Employers Willing to Overlook a Criminal Record to Hire the Right Person



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5 Myths (and Facts) About Hiring Veterans



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States Use Workforce Data to Connect Colleges to Careers



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Program Updates:



LEARN HOW YOU CAN HELP
GettingTalentBackToWork.org

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State Resources

1. Please appoint a Workforce Readiness representative for all Calif chapters;
2. Publicize your commitment and Action Steps;
3. Join a State - Wide Call to discuss Options and “join forces”
4. Contact me for additional questions

Thank you for your commitment to your chapter membership -



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Workforce Readiness

Brad Weinstein, Director, SHRM-CP, SPHR, PHRca
workready@calshrm.com



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Governance

Chapter Business Operations Basics

Trisha Zulic, SHRM-SCP



CalSHRM State Director
Trisha.Zulic@CalSHRM.com

Knowledge is Power

SHRM Chapters are nonprofits and their officers and directors are not immune from legal claims and liability for their actions.

To minimize both, nonprofits and the individuals who operate them i.e. your board, we will highlight some of the legal requirements.

This power point and information referenced will be sent out after the summit.



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Did you know?!



- ▶ Good Internal Controls (Segregation of Duty)
- ▶ Documented Conflict of Interest policy and disclosure process
- ▶ Volunteer Manual (good to have not a must)
- ▶ Who is signing your form 990?!
- ▶ Prior year tax returns, where are they?!
- ▶ SI-100 filing?! Who does it annually?!
- ▶ Raffles are illegal in California. Must be Opportunity Drawing and should be registered
- ▶ Antitrust laws apply?! Sherman Act, Federal Trade Commission Act and Clayton Act

501(C)(6) Requirements

- ▶ Must be a membership organization and have meaningful membership financial support. SHRM Chapter support counts as membership financial support
- ▶ No part of net earnings may inure to the benefit of any current or immediate past board members
- ▶ Must not engage in a regular business of a kind ordinarily carried on for profit, even if the business is operated on a supportive basis or produces sufficient income to be self-sustaining. WHAT?1



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Conflict of Interest

- ▶ Legitimate dualities of interest exist, which may or may not create an actual conflict
- ▶ A conflict is created where a council member has a direct or indirect interest, financial or otherwise, in a matter involving the association
- ▶ The Board, not the individual, determines if a conflict exists and determines the appropriate remedy
- ▶ Remedies:
 - ▶ Disclosure
 - ▶ Recusal
 - ▶ Resignation



Annual Reporting - Form 990 -It's Changed Good Governance Practices

- ▶ Conflict, Whistleblower & Document Retention/Destruction Policies (SOX)?
- ▶ Minutes of Board and Executive Committee Meetings?
- ▶ Compensation procedures and disclosures?
- ▶ Board review of Form 990 before filing?
- ▶ Review of Financials monthly?

Operational Basics

Contractual Clarity

- ▶ Lack of written agreements
- ▶ Ensure your contracts/agreements are reviewed by legal counsel
- ▶ Indemnification/Hold Harmless and Force Majeure clauses
- ▶ Insurance protection for chapters is critical



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Governance as Leadership ushered in a pivotal change in thinking, identifying three simultaneous, mutually reinforcing modes of governance.

Fiduciary Mode	Strategic Mode	Generative Mode
Boards are concerned with the stewardship of tangible assets. They ask, “What do we have and how do we use it?”	Boards create a strategic partnership with management. They ask about market positioning, strategic drivers/priorities, competition, and stakeholders.	Boards provide a less recognized but critical source of leadership. They ask, “Have we framed this issue correctly? How else might we look at this? What else should we consider?”

Based on Richard P. Chait, William P. Ryan, and Barbara E. Taylor, *Governance as Leadership: Reframing the Work of Nonprofit Boards*

Committees

- ▶ The case to reduce the number of standing committees, and to avoid vague objectives, discussion without action, and frustration/burnout
- ▶ In a “zero-based committee structure... the organization reviews its planned work for the board each year and then establishes only those committees that it will need...
- ▶ “Committees should perform regular self-assessments to determine if they are working effectively, achieving their established goals, and providing value to the organization.
- ▶ “Committee chairs and vice chairs should... [translate] the board’s goals for the committee into meeting agendas and work plans.”

Eileen Morgan Johnson, ASAE, “The Basics of Board Committee Structure”



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Board Composition

- ▶ The case for boards to include diverse individuals
 - “When a nonprofit's board reflects the diversity of the community served, the organization will be better able to access resources in the community through connections with potential donors and/or [partners]...”
 - “A diverse board will improve the nonprofit's ability to respond to external influences that are changing the environment...”
 - “...When a nonprofit board is facing a major decision, diverse perspectives on the board are better qualified to identify the full range of opportunities and risks.
 - “Boards that are not diverse risk becoming stagnant:... [I]dentifying and cultivating new board members will be a constant challenge.”

Council on Nonprofits, “Diversity on Nonprofit Boards”



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Suggestions

► Highly Effective Boards

1. Develop goals [rather than projects] to guide their work.
2. Create an assessment protocol to inform progress and identify strengths and weaknesses.
3. Build a board that, first and foremost, supports the mission of your chapter. If a board is built with an overemphasis on fundraising, it can inadvertently send the message that only the members money matters.
4. Ensure your board represent the past, the present, and the future.
5. Understand the importance of diversity to a board's effectiveness. They welcome open dissent. One way for boards to achieve diversity is to develop a succession plan for how they will cultivate potential board members that represent all types of diversity.



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Suggestions

Highly Effective Boards

- ▶ 6. Are driven by data rather than anecdote.
- ▶ 7. Set term limits and actively recruit trustees who are not “insiders.”
- ▶ 8. Operate using a consent agenda model. Board time needs to be spent in professional development to ensure board members understand the context in which they govern, strategy sessions to address the short-term needs of the school, and generative discussions.
- ▶ 9. Orient new trustees and make professional development for all trustees an essential part of board operations.
- ▶ 10. Restrain themselves from having too strong a bias toward action and pause to ask the bigger questions first.

Donna Orem, “10 Habits of Highly Effective Boards,” *Independent Ideas* blog (June 19, 2017)



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Operational Basics

Social Media-USE IT, but be careful there are risks

- ▶ **Privacy Issues** - sharing a photo/video containing an individual's likeness without the individual's consent. When people register are they giving consent?!
- ▶ **Defamation of Character** - making a false statement, written (libel) or spoken (slander), that harms someone's reputation. *Trisha ate all the donuts on the donut wall when she did not need them!*



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Operational Basics

IP, Copyrights, Patents and Trademarks

- ▶ **Infringement** - posting materials on your website or blogs
- ▶ **Trademark** - Is your registered?



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Volunteer Protection Act of 1997

Can-SPAM Act

GDPR

- ▶ The act is a federal law limiting a volunteer's personal liability when acting on behalf of an organization (chapter) and within the scope of his/her/X responsibilities

Exceptions to immunity include acts of gross negligence, recklessness, willful or wanton misconduct, or intentionally tortious conduct

To avoid liability or the acts of volunteers shifting to the chapter, volunteers should be carefully vetted and managed with a policy outlining responsibilities, expectations and prohibited activities of volunteers should be adopted



Suggested Insurance

- ▶ General Liability Insurance
- ▶ Directors & Officers (D & O)
- ▶ Errors & Omissions (E & O)
- ▶ Special Events
- ▶ Umbrella
- ▶ Event Cancellation

CalSHRM Broker:

- ▶ Insurance
- ▶ Geoff Herman
- ▶ Phone: [415-447-4212](tel:415-447-4212)
- ▶ Fax: [415-447-4181](tel:415-447-4181)
- ▶ 422 Presidio Ave, San Francisco, CA 94115
- ▶ geoff@riskguardins.com
- ▶ www.riskguardins.com



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Questions????????



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SHRM Certification 2020

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Certification Director
certification@calshrm.com



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Be the best. Get the best. Set yourself apart with a SHRM-CP/SCP Certification

- ▶ SHRM Certification Resources
- ▶ Body of Competency & Knowledge
- ▶ SHRM Examination Information
 - ▶ Preparation
 - ▶ Test Taking Tips
 - ▶ Your journey through the certification process
 - ▶ Eligibility & Fees
- ▶ Exam Preparation - Learning Options
- ▶ SHRM Recertification Resources



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SHRM Certification Resources

- ▶ <https://www.shrm.org/certification/pages/default.aspx>

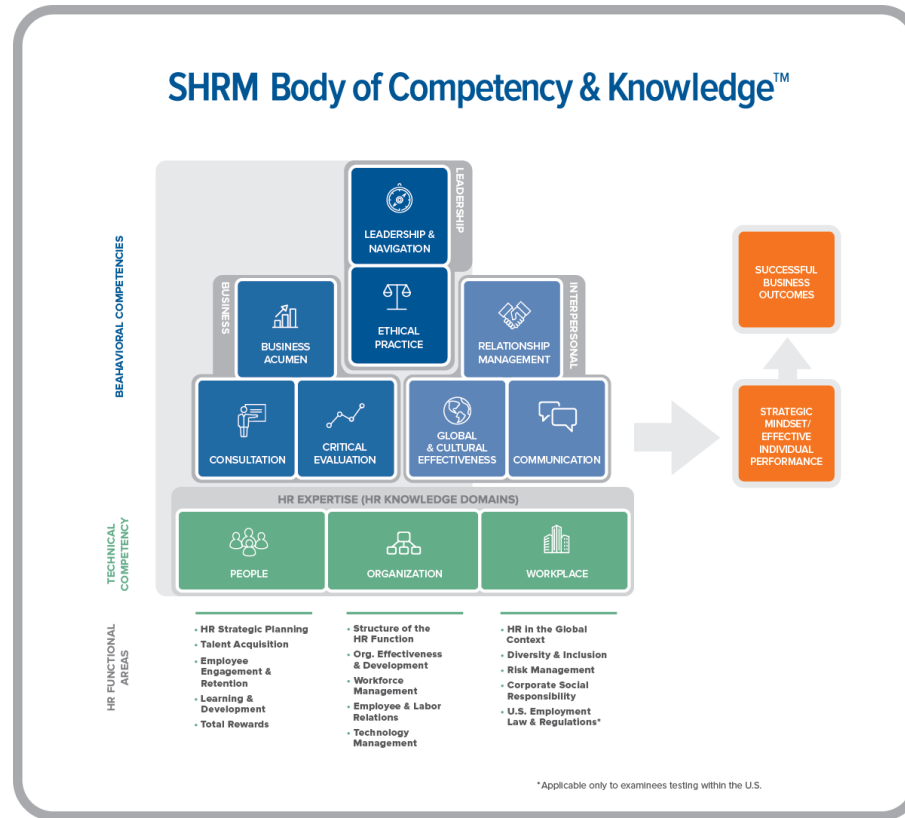


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SHRM Body of Competency & Knowledge

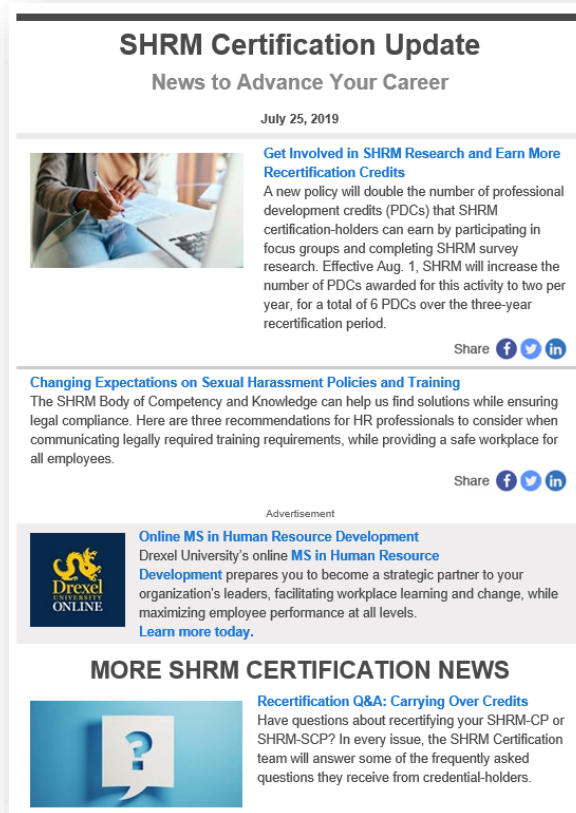
SHRM BOck



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SHRM Certification Update E-Newsletter



- Test Taking Tips
- Books for PDC's
- Hiring Best Practices
- Sharpen Your Competency Skills
- HR Job Postings
- Preapproved Activities
- Useful Links
- Much More!

Log into your SHRM Membership Profile
And subscribe today:

<https://lp.shrm.org/preferences.html>

SHRM Certification Exam Eligibility

Applicants must meet specific educational and work experience criteria at the time they submit their application in order to be eligible to sit for the SHRM-CP or SHRM-SCP exam. These requirements are outlined below:

SHRM-CP AND SHRM-SCP ELIGIBILITY CHART

Credential	Less than a Bachelor's Degree*		Bachelor's Degree		Graduate Degree	
	HR-Related Program	Non-HR Program	HR-Related Degree	Non-HR Degree	HR-Related Degree	Non-HR Degree
SHRM-CP**	3 years in HR role	4 years in HR role	1 year in HR role	2 years in HR role	Currently in HR role	1 year in HR role
SHRM-SCP	6 years in HR role	7 years in HR role	4 years in HR role	5 years in HR role	3 years in HR role	4 years in HR role

**Less than a bachelor's degree includes: working toward a bachelor's degree, associate's degree, some college, qualifying HR certificate program, high school diploma, or GED.*

STUDENT ELIGIBILITY

Students who are enrolled in their final year of an undergraduate or graduate degree program at a college or university that has been approved by SHRM's Academic Initiatives staff as being aligned to SHRM's curriculum guidelines are eligible to sit for the SHRM-CP exam. Students must also have accumulated at least 500 hours of an internship or practical HR experience and must be in good standing with their school. See a current listing of approved schools at [shrm.org/academics/programdirectory](https://www.shrm.org/academics/programdirectory).

Learn More: <https://www.shrm.org/certification/apply/eligibility-criteria/Pages/default.aspx>



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SHRM Certification Exam Fees

**2019-2020 Winter Testing Window:
Dec. 1, 2019 – Feb. 15, 2020**

APPLICATIONS ACCEPTED	EARLY-BIRD APPLICATION DEADLINE	STANDARD APPLICATION DEADLINE
May 13, 2019	Oct. 21, 2019	Nov. 18, 2019

**2020 Spring Testing Window:
May 1 - July 15, 2020**

APPLICATIONS ACCEPTED	EARLY-BIRD APPLICATION DEADLINE	STANDARD APPLICATION DEADLINE
January 6, 2020	March 20, 2020	April 10, 2020

**2020-2021 Winter Testing Window:
Dec. 1, 2020 – Feb. 15, 2021**

APPLICATIONS ACCEPTED	EARLY-BIRD APPLICATION DEADLINE	STANDARD APPLICATION DEADLINE
May 13, 2020	Oct. 16, 2020	Nov. 6, 2020

SHRM-CP/SHRM-SCP EXAM FEES

Exam Fees	SHRM Member Price	Nonmember Price
Early-Bird Exam Fee	\$300 USD	\$400 USD
Standard Exam Fee	\$375 USD* (*includes non-refundable \$75 standard deadline fee)	\$475 USD* (*includes non-refundable \$75 standard deadline fee)
Application Processing Fee (nonrefundable)	\$50 USD (included in exam fees)	\$50 USD (included in exam fees)
Transfer Fee	\$100 USD (subject to additional \$53 Prometric exam cancellation fee when applicable)	\$100 USD (subject to additional \$53 Prometric exam cancellation fee when applicable)
Retest Fee	Full exam fee	Full exam fee
Rescore Fee	\$50 USD	\$50 USD

Learn More: <https://www.shrm.org/certification/apply/exam-windows-and-fees/Pages/default.aspx>



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Your Journey Through SHRM Certification

Prepare, apply or recertify using this helpful brochure.
Provide to your chapter or state council to help others navigate the SHRM certification process.

Why earn the SHRM-CP/SHRM-SCP credential?

- BOOST YOUR SALARY**
Certified professionals report earning higher salaries. SHRM-CP and SHRM-SCP earn for a SHRM-CP.
- Demonstrate your HR expertise.**
Among executives, the top reason for pursuing SHRM certification was to enhance their credibility as an HR professional.
- GET PROMOTED**
68% of certified professionals report that their credential was a key factor in receiving a promotion.

Gain readiness for any path your HR career takes.
Certified professionals report a greater understanding of necessary skills.- SHRM Body of Competency & Knowledge™**
The SHRM Body of Competency and Knowledge (SHRM BoCK) is the basis for the SHRM credentials. The SHRM BoCK describes the behavioral competencies and HR knowledge HR professionals need for effective job performance. SHRM's dual approach to understanding HR success is supported by empirical research and accredited by the Bureau Center for Testing.

SHRM-CP SHRM-SCP

YOUR JOURNEY THROUGH SHRM CERTIFICATION
Decide > Apply > Prepare > Certify > Recertify

Professional development is easier with SHRM membership. Join today to earn professional development credits and save money!

shrmcertification.org

Download the SHRM BoCK at shrmcertification.org/SHRMBoCK

SHRM certification gives you the opportunity to demonstrate mastery of the core competencies needed to ensure your success in today's business environment.

DETERMINE YOUR CREDENTIAL
Eligibility for the SHRM-CP or SHRM-SCP is based on a combination of education and related work experience at the time of application. Neither an HR title nor SHRM membership is required.

SHRM-CP/SHRM-SCP Eligibility Criteria

PREPARE FOR THE CERTIFICATION EXAM
The SHRM Learning System is the leading resource to prepare for the SHRM-CP or SHRM-SCP exam. SHRM has designed several learning options to suit different learning styles, including group study and lecture. Each option includes the SHRM Learning System. Choose the learning option that fits your preference.

Self Study Program
Personal Study Plan
Provides the ultimate flexibility for learning.
\$605 \$920

Instruction Led Programs
LIVE IN-PERSON
Offered at various locations.
\$1,400 \$1,750
LIVE ON A WEBINAR
A virtual lecture experience with real-time Q&A and chat.
\$1,310 \$1,500
LIVE EDUCATION
Lecture-based instruction with 275 Education Partners worldwide.
\$1,310 \$1,500
ONLINE EDUCATION
Live and on-demand self-paced courses.

ELIGIBILITY CRITERIA

Credential	Education & Experience	SHRM-CP	SHRM-SCP
SHRM-CP	1 year in HR or 2 years in HR with a bachelor's degree	2 years in HR with a bachelor's degree	2 years in HR with a master's degree
SHRM-SCP	2 years in HR with a bachelor's degree	2 years in HR with a master's degree	2 years in HR with a doctorate degree

EXAM TESTING WINDOWS
The testing windows are the dates during which the exams are administered.
SHRM-CP: March 1 - June 30, 2019
SHRM-SCP: March 1 - June 30, 2019
Application deadline: Feb. 15, 2019
Last day to receive questions: Feb. 15, 2019

SHRM FOUNDATION SCHOLARSHIPS
Various professional development and certification scholarships are awarded by the SHRM Foundation. Learn more at shrmfoundation.org/scholarships

RECEIPT ON THE GO!
Use the SHRM Certification App to load your professional development credits on the go.

Download the app today at shrmcertification.org/app

www.shrm.org/vlrc >> SHRM Certification >> Promote Certification



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5 Ways Your Company Will Benefit From SHRM Certification

1. **Current and Relevant Knowledge**
2. **Focused on Advancement**
3. **Developed with Employers in Mind**
4. **Globally Applicable and Universally Recognized**
5. **Backed by the Leading Advocate for HR Professionals**



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Next Generation Credentials For HR Professionals

Testimonial Videos:

Michelle Klissler, SHRM-CP

<https://youtu.be/IO8YM0N4RUU>

April McWilliams, SHRM-SCP

Jennifer Jones, SHRM-SCP

Paul Greening, SHRM-CP

<https://youtu.be/01d9R6sqD-U>

Bonnie Brooks-Tate, SHRM-SCP

https://youtu.be/wj_ZcVQwa7k

Caryn Rainey, SHRM-SCP

<https://youtu.be/OuVa7XQicWw>

Dethra Giles, SHRM-SCP

<https://youtu.be/HddMwlOvl2o>



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Exam Preparation - Learning Options

<https://youtu.be/E5bJa-7TwRY>



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SHRM Learning System



The **2020 SHRM Learning System**

Delivers the most comprehensive, flexible and effective SHRM-CP and SHRM-SCP exam preparation.

Designed using a proven approach for teaching adult learners, this system offers a personalized SmartPath™ experience that is designed to dynamically adjust based on the user's progress and proficiency. Real-time results allow students to use their time wisely and increase readiness for the SHRM-CP and SHRM-SCP exams. There's no better way to successfully prepare for SHRM certification.

Learn more about the SHRM Learning System:

<https://learnhrm.shrm.org/ls/>



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SHRM Learning System

MODULE // HR COMPETENCIES

- Leadership & Navigation
- Ethical Practice
- Business Acumen
- Consultation
- Critical Evaluation
- Relationship Management
- Global & Cultural Effectiveness
- Communication

MODULE // PEOPLE

- HR Strategic Planning
- Talent Acquisition
- Employee Engagement & Retention
- Learning & Development
- Total Rewards

MODULE // ORGANIZATION

- Structure of the HR Function
- Organizational Effectiveness & Development
- Workforce Management
- Employee & Labor Relations
- Technology Management

MODULE // WORKPLACE

- HR in the Global Context
- Diversity & Inclusion
- Risk Management
- Corporate Social Responsibility
- Employment Law & Regulations (U.S. Only)



Try the Free Demo: <https://www.shrm.org/certification/prepare/Pages/Features.aspx>



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Other SHRM Preparation Exam Learning Options

INSTRUCTOR-LED PREPARATION			
EDUCATION PARTNER PROGRAMS	CERTIFICATION PREP SEMINARS	SELF-STUDY PROGRAM	ORGANIZATIONAL TRAINING & DEVELOPMENT
A traditional classroom setting, online format or a hybrid of the two—over a period of weeks or in a condensed format, led by a local, trusted training provider.	A virtual or in-person classroom environment with interactive and comprehensive discussions, activities and preparation techniques from a SHRM-certified, expert instructor.	Study with our learning tools, where and how you want. Use SmartStudy tools to customize your learning.	Customized staff training at your location, virtually, or a hybrid of the two—eliminating costly travel expenses and time away from the office.
Ideal for those who prefer a structured learning environment.	Ideal for those who prefer a structured learning environment.	Ideal for those who prefer to learn on their own schedule.	Ideal for organizations who are looking for a flexible education option.

Learn More: <https://www.shrm.org/certification/prepare/learning-options/Pages/default.aspx>



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Congratulations You Earned Your Certification



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SHRM Recertification - 3 Years

Example: Passed the test: May 2020
 Add three years: May 2023
 Birth month: July
 Recertification date: July 31, 2023

Another example:

 Passed the test: December 2020
 Add three years: December 2023
 Birth month: November
 Recertification date: November 30, 2023



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Recertification Requirements

Qualifying Credit-Earning Activities:

Category	Description/Examples	Maximum Number of Professional Development Credits (PDCs)
Advance Your Education	Continuing education such as: <ul style="list-style-type: none">○ Conferences○ College courses○ Seminars○ e-Learning (Instructor-Led and Self-Directed)○ Chapter programs○ Webcasts○ Audiocasts○ Podcasts	<ul style="list-style-type: none">○ No maximum for instructor-led PDCs○ No maximum for self-directed program PDCs
Advance Your Organization	Work projects endorsed by supervisor which support organizational goals and advance or demonstrate capabilities in one or more HR competency.	<ul style="list-style-type: none">○ Maximum of 20 PDCs per cycle
Advance Your Profession	Thought leadership and volunteer activities such as: <ul style="list-style-type: none">○ Professional membership○ Volunteer leadership○ Speaking at conferences○ Writing and Research	<ul style="list-style-type: none">○ Maximum of 30 PDCs per cycle

- Recertification will be required every three years.
- Professionals will need to earn 60 professional development credits (PDCs) in order to recertify.

Recertification Application Fee:

SHRM Members = \$100 USD

Nonmembers = \$150 USD

**Learn more about
recertification requirements:**

shrmcertification.org/recertification



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Opportunities To Earn Recertification Credits

- SHRM Chapter & State Council Programming
- Volunteer Activities
- SHRM Foundation Veterans at Work Certificate Program
- SHRM Specialty Credentials
- SHRM Competency Self Assessment
- Conferences
- Education Programs
- College / University Courses
- **FREE** Webcasts!
- E-Learning
- SHRM Essentials of Human Resources
- Books & E-Books
- Supervisor-Endorsed Work Projects
- Presentations
- Research, Writing & Publishing
- Professional Membership



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SHRM Recertification

<https://www.youtube.com/watch?v=Y8ZQ72Is5Fw>

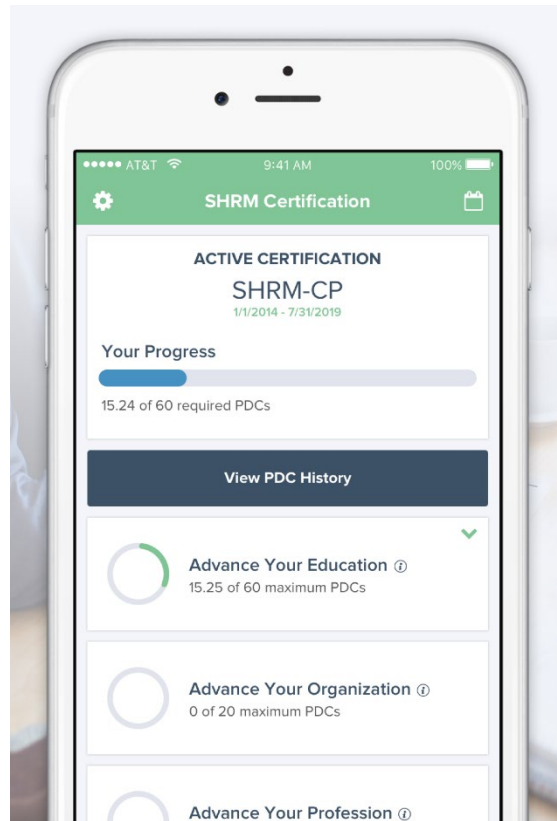


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SHRM Recertification App

<https://www.youtube.com/watch?v=i-q0WH0WEVo>



THE SHRM CERTIFICATION APP ALLOWS YOU TO:

- » Easily add your PDCs under the **Advance Your Education** section.
- » Track all the activities you have already added to your record.
- » Search and filter approved activities by competency, date and location.
- » Discover upcoming activities in your area.
- » Find out when you're ready to apply for recertification!

Search for "SHRM Certification" in the App Store, or visit shrmcertification.org/app to download.



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SHRM Recertification App - Auto Fill

PDCs earned by SHRM members will be automatically uploaded to their recertification portal

- ✓ SHRM Conferences
- ✓ SHRM Seminars
- ✓ SHRM eLearning sessions
- ✓ SHRM membership is also now being auto uploaded

If you don't recall your login information,
please contact SHRM. Do not create a new account.

Questions? (703) 535-6080 or recertification@shrm.org



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SHRM SPECIALTY CREDENTIALS

Declare your specialty and stand out from your peers.



PROVE

that you're a strategic talent acquisition partner.



USE

people-related data to impact business decisions.



DECLARE

your specialty California HR Law.



DEMONSTRATE

your individual impact on your organization by elevating HR.



DISTINGUISH

yourself by demonstrating your comprehensive workplace immigration knowledge.

shrm.org/specialtycredentials



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**Earn 10
SHRM PDCs**

Veterans at Work:

SHRM Foundation's commitment to empowering HR professionals to attract, hire and retain veterans.



The SHRM Foundation believes that veterans are valuable members of our workforce, and this initiative will help HR professionals attract, hire and retain members of the military community.

Veterans Initiative Programs



Innovation Grants

Awards of up to \$10,000 to SHRM chapters & state councils to drive local veteran employment programs.



Veterans at Work Certificate

A free, multi-faceted program to teach best practices to attract, hire and retain veterans, and grants 10 PDCs upon completion.



Inclusion Captains

HR professionals teaching employers how to engage and integrate veterans into their places of work.



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CalSHRM Certification Events 2020

SHRM CP/SCP Certification

Virtual Courses (30 to 32 hours)

March 17, 2020 - May 5, 2020 - Tuesday's & Thursday's - 12:00 pm - 2:00 pm (Total 32 hours)

March 3, 2020 - May 11, 2020 - Monday's 5:45 pm - 9:00 pm (Total 30 hours)

California HR Law

January 22 - 23, 2020 - San Diego, California

April 13 - 14, 2020 - Sacramento, California

July 14 - 15, 2020 - San Jose, California

October 21 - 22, 2020 - Costa Mesa, California

HR Department of One

January 23, 2020 - San Diego, California

July 15, 2020 - San Jose, California

Talent Acquisition

April 13 - 14, 2020 - Sacramento, California

October 21 - 22, 2020 - Costa Mesa, California



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SHRM Foundation Certification Scholarship

<https://www.shrm.org/foundation/ourwork/scholarships/certification/pages/default.aspx>



- ▶ **Scholarship:** SHRM Certification exam and preparation (SHRM-CP or SHRM-SCP)
- ▶ **Number:** 220 scholarships distributed annually
- ▶ **Application Opens:** January 15
- ▶ **Deadline:** May 1
- ▶ **Results Notification:** August 2*
- ▶ **Terms of Use:** Expires within 12 months of issue date
- ▶ Scholarships received August 2 must be used between August 2, 2020 and August 2, 2021
- ▶ *If you applied for a SHRM certification scholarship by May 1, 2020, you will receive a notification by email about your scholarship status by close of business on August 2, 2020.
- ▶ *The following information applies to individual applicants. SHRM state councils and chapters that wish to apply, please go to [Chapter and State Council Certification Scholarship application information](#).*



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SHRM Certification



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www.calshrm.us.com

California State Council of SHRM

www.calshrm.us.com

SHRM Certification:

<http://SHRMCertification.org>

Chapter Locator:

<https://www.shrm.org/search/pages/LocalChapter.aspx>

**Promote Certification resources
on the VLRC:**

<https://community.shrm.org/vlrc/shrm-certification/cert-promo/certification>



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