Chapter Operations Planning Guide

ASSE Chapter Communities provide accessible, face-to-face opportunities for ASSE members to become better safety professionals. How will your chapter deliver this value to its members this year?

Every July the new chapter leadership team should spend time setting goals and planning out chapter activities to provide a meaningful member experience for chapter members for the upcoming year. Strong planning will also help better position the leadership team to achieve high levels of recognition (Platinum Chapter!). This planning guide can help you in this process.

This document is a resource for chapter planning. Chapters only need to submit goals and plans to achieve those goals through an Annual Chapter Operations Plan. Feel free to use the Annual Chapter Operations Planning Template or submit your annual plan in a format that works best for you. In either case, the Chapter Operational Plan should be uploaded into the Chapter Operations Management Tool (COMT) by August 15.

☐ Step 1 – Schedule a meeting with the chapter leadership team (face-to-face is recommended). These meeting should occur before July 31 to give the team enough time to flesh out the plan to submit to their Area Director/RVP and Society before the August 15th deadline.

☐ Step 2 – At this meeting set goals as a chapter before beginning the activity planning exercise. A few suggestions: Do not select more than three goals (just one is ok!) and keep them achievable & measurable. Using the SMART Goal rule is always a good exercise (Specific, Measurable, Achievable, Realistic and Timely).

Below are a few questions to help the goal setting discussion. (There is an example exercise at the end of this guide). Also, keep in mind the perspective of ALL chapter members, both those that show up to meetings and those who don’t. Ultimately the chapter should be focusing on members’ needs. Chapters that also have sections should consider them in the chapter assessment.

1. What are the chapter’s top challenges? (Come up with at least two)

2. What do we do really well as a chapter? (Come up with at least three)

3. What opportunities are there for our chapter? (Come up with at least two)
4. If we could pick one or two things to focus on, either something to change, improve, or optimize, about the chapter what would it be?

5. Now take some of these items and turn them into goals. What do you want to accomplish in these areas and how will you measure your progress?

☐ Step 3 – Build out an action plan for these goals. To do this, you can follow this process:

1. Write down your goal/objective – ensure it is clear.
2. Write down all the steps you can think of that you may need to achieve this goal. (Action Items)
3. Organize this list into a plan, by taking the list of steps and organizing them into sequential order. Assign owners/realistic timeframes for completion. Look to chapter membership for assisting.
4. Revisit these plans each time you meet.

☐ Step 4 – Begin building out the activity plan for the year. Use this meeting to make high-level decisions on activities the chapter would like to focus on, assign owners, and timelines for plan development. This will help the leadership team schedule out the work and activities for the chapter year. Some of these items are required, to maintain your charter and some of them are measured on the Chapter Operations Management Tool to earn chapter recognition points.

☐ Step 5 – By August 15 submit the Annual Operation Plan to the Chapters Operations Management Tool (COMT). There is a template provided for your use.
Example of Goal Setting Exercise

Top challenges as a chapter:

1. Can’t get members to meetings
2. Prospective members in the local area are not joining

What we do really well:

1. We provide frequent and consistent meeting opportunities
2. We have a strong and engaged core base of members who attend the meetings (good repeat attendance)

Opportunities for our chapter:

1. New businesses in the area with large safety teams
2. Strong construction industry in the local area

SMART goals for this year

1. By June 30, our chapter will have increased our average meeting attendance by 5%.
2. By June 20, our chapter will have created a relationship with the Construction Practice Specialty to offer construction specific content/networking opportunities for the large construction membership base we have.

Notes:

This chapter could have developed goals for every point they discussed, however they chose to focus most of their efforts on the meeting attendance, as this has been a longstanding challenge for their chapter. They also have been realistic about their attendance goals. (Starting small is ok; it’s starting that is most important).

This chapter selected the construction industry activities goal because they know it adds value add back to the members in a way that is very realistic for them to accomplish. With the strong existing construction base in their area and the new businesses coming to the area, this is the time for these types of activities in their chapter.