

## **Sections in the CDP**

### ***Membership Retention and Recruitment***

Number of nationally paid, locally paid and Lifetime Member

### ***Operations***

Calendar of Events

- Meetings (General and CEB)
- Community Outreach
- Social Events
- Events of other Affinity Groups

Governance

Meetings (Executive Board and General Body)

Strategic Planning/Goal Setting/Long Range Plan

### ***Communication***

Marketing

Internal Communications

External Communications

Public Relations

### ***Membership***

Number of nationally and locally paid members

Retention

Recruitment

Membership Satisfaction

### ***Programs***

Participation in National Programs

Participation in Regional Programs

Development of Local Programs

Development of Chapter Programs

Stewardship/Community Outreach

### ***Financial Vitality***

Corporate Solicitation

Fundraising

Partnerships

Non-Profit Status

### ***Leadership***

Transitioning

Consistency from term to term

Contested positions during elections

***Connection to the National Society***

Communication with RAEB/REB

Road Shows

Attendance and participation at Regional and National Conferences

## CDP Questions/Checklist and Sections

### *Chapter Operations*

#### *Chapter Calendar*

- Do you have a calendar of events
- Do you include all chapter, regional and national activities on your calendar
- Do you include local, non-NSBE events on your calendar (including events of local partner organizations)
- When do you prepare your calendar
  - Beginning of the year
    - After chapter board elections
    - During the transition meeting
  - If you prepare your calendar at the beginning of the year, how often do you update it
    - As events change
    - Each month
    - Every other month
  - Beginning of each month
  - Semi-Annually

Include a copy of your chapter calendar in the binder. Include any other information you feel is pertinent to the creation of your chapter calendar.

#### *Governance*

- Do you have a complete Chapter Executive Board (CEB)
- How many positions are on your board
- How many positions are filled
  - Which positions are filled
  - Which positions are vacant – what you are doing to either fill the position or ensure that the job gets done
- Do you have a chapter constitution or operating guidelines
  - Is it uploaded on NOL

Please include a copy of your chapter eboard roster/contact sheet

Please include a copy of your chapter constitution or operating guidelines.

#### *Meetings*

- Do you have regular Chapter Executive Board (CEB) meetings
- How often do you have CEB Meetings
  - Monthly
  - Bi-Monthly (every other month)
  - Quarterly
  - As needed (no regular frequency)
- Do you have regular chapter general body meetings
- How often do you have general body meetings
  - Monthly
  - Bi-Monthly (every other month)
  - Quarterly
  - As announced (no regular frequency)

- Do you take minutes at all chapter meetings
- Do you make all meeting minutes (CEB Meetings and General Body Meeting) available to your chapter members
- Do you invite chapter members to your CEB Meetings

Include the meeting agendas, meeting minutes, advertisement for meetings (e.g. flyers, email, webpage screenshot)

### *Strategic Planning*

- Do you have a long range plan for your chapter
- Do you use the regional or national goals/directives in strategic planning for the chapter

Include your chapter's strategic or long range plan (whatever format it is in)

### *Communication*

- Do you market your events to chapter members, other affinity groups and local chapter of professional societies, the general public
- How do you communicate events to chapter members (check all that apply)
  - Flyers
  - Emails
  - Radio Spots
  - Newspaper Ads
  - Magazine Ads
  - Word of mouth
  - Other (please indicate)
- How do you communicate events to people outside of your chapters
  - Flyers
  - Emails
  - Radio Spots
  - Newspaper Ads
  - Magazine Ads
  - Word of mouth
  - Other (please indicate)
- Do you have a chapter newsletter
- Do you have an updated website (i.e. do you update the website at least quarterly)
- Do you send information on chapter events to your regional alumni executive board
- Do you submit articles for the Arsenal
- Do you submit articles to the NSBE magazine? Career Engineer? The Bridge Magazine
- Do you contribute articles to your regional newsletter (both collegiate and alumni)

Include a copy of the above referenced materials.

### *Membership*

- How many nationally paid members are on your chapter roster
- How many locally paid members are on your chapter roster that are not nationally paid members
- How many Lifetime members are on your chapter roster
- How many of your chapter members have received Professional Recognition or a Professional Award
- How many of your chapter members are
  - PEs
  - PMPs
  - EIT
  - JDs
  - PhDs
  - CCNA
  - other

Include your local chapter roster

Include your chapter roster from NOL with the membership classification included on the roster

Include any documentation on the Professional Recognition or Awards given

Include a list of those chapter members who have certifications with the name and the certification

### *Retention*

- What percentage of your membership did you retain?
  - Please indicate how many nationally paid members were retained as a percentage.
  - Please indicate the number and percentage of locally paid members (who are not nationally paid) that were retained.
- How does your chapter retain its current members? (examples include reminder emails, reminders at meetings, flyers, etc)

Include any information related to membership retention.

### *Recruitment*

- Does your chapter have a membership drive to recruit new members?
  - When do you have your membership drive? (indicate the month)
  - Does this time of the year coincide with a particular time of the year in your chapter operations? If so what is the time in the chapter calendar or your chapter operations that drives when you have your membership drive.
- How else does your chapter recruit new members
  - Reach out to graduating seniors
  - Recruit from the local employer(s) black employee networks
  - Reach out to at large members who attend regional and national NSBE events
  - At Large members who are referred to the chapter by the Regional AE Chair Elect or WHQ
  - Other (please describe)

Include any information that you use in the recruitment of new members (e.g. flyer, chapter brochures, emails, etc)

### *Membership Satisfaction*

- Are your members satisfied with your chapter? How do you know?
- Do you poll your members to see if they are satisfied?
  - How do you poll your members
  - NOL Survey
  - Other Survey Service
  - Informal survey (ask how they generally feel)
  - Email the membership asking for information on how they think the chapter is doing

Include information that you use in polling your members and results (if applicable)

### *Programs*

#### *National Programs Participation*

- Describe your chapter's participation (in any capacity) in the following programs (if none please indicate)
  - NSBEPreneur
  - TMAL
  - NSBE Science Fair
  - Boeing Flight Competition
  - Summer Camping Conference
  - PCI Miniconferences (Fall Regional Conference and National Convention)
  - Mentoring/CyberMentoring
  - FaceTime programming that is not part of the CyberMentoring Program
  - Engineering Design Competition
  - PCI Science Fair
  - How many SIG members do you have in your chapter?
    - What SIGs are they involved in?
    - Do you have SIG Board members in your chapter?
  - Alumni Awards
  - Alumni Scholarships

#### *NSBE Jr. Support and PCI Programming*

- Have you chartered a NSBE Jr. Chapter
- Do you serve as the primary support structure for a NSBE Jr. Chapter
- Do you support a NSBE Jr. Chapter in any capacity (i.e. help when asked; sponsor an event on a regular basis [annual, monthly, etc] but do not consider yourselves as primary support
- Do you have PCI Program made up of students who attend the program on a consistent basis (weekly, monthly quarterly)
- Do you sponsor PCI Programming that occurs semi-annually or annually?
- Do you sponsor PCI Programming on a sporadic basis?
- Do you use the Microsoft Grant given to NSBE as a part of your PCI Program

- How often did you download the software available
- Do what computers do you download the software
  - Computer Lab (in a school, church, etc)
  - To the home computer of the NSBE Jr. Students (i.e. instructions are given to the students on how to download the software)
  - Other
- Do you use software from the grant in your sessions with the PCI Students
- Do you award scholarships to the students who participate in your PCI Program?
  - How many
  - How much
- Do you host a Scholarship Banquet (or similar event) to recognize the students who have been awarded the scholarships
- How do you raise the money for your PCI Scholarships
  - Donations
  - Fundraise
  - Corporate Solicitation
  - Other

#### *College Initiative Programming*

- Do you interact with the local NSBE Collegiate Chapter
- How do you interact with them
  - Present at their chapter meetings/chapter events
  - At conferences
  - Have a representative attend the collegiate chapter meetings
  - Invite the collegiate chapter members to your meetings
  - Host joint activities
- Do you award scholarships to the collegiate students who are part of a local NSBE Collegiate Chapter?
  - How many
  - How much
- Do you host a Scholarship Banquet (or similar event) to recognize the students who have been awarded the scholarships
- How do you raise the money for your Scholarships for the collegiate students
  - Donations
  - Fundraise
  - Corporate Solicitation
  - Other

#### *Conferences and Professional Development*

- How many chapter members participate in certification training at the conferences
- How many of your chapter members attended RLC?
- How many of your chapters members participated in the virtual training hosted by your RAEB? How many of your chapter leaders participated? Which one? If your chapter did not participate – why? (time not conducive; did not feel we needed training; the CDs provided sufficient information; did not know that the virtual training was scheduled; technology issues)
- How many of your chapter members attended FRC/PDC?

- How many chapter members serve as volunteer at Regional and National Events
- How many chapter members serve as judges for competitions
- How many of your chapter members attended the 2008 National Convention? If they did not what reasons did they give for not attending (observance of Easter holiday, could not get time off from work/school, family obligations, cost, location, content)
- Do your chapter members attend lectures, seminars or courses aside from NSBE Conferences? If yes please list them
- Do any of your chapter members present or give lectures, seminars or courses aside from NSBE Conferences? If yes please list them

*What Regional Programs do you participate in?*

- Please list them.

*What programs do you have at the chapter (local) level?*

- What type of programs do you conduct at the local level
- Do you partner with other organizations to plan and/or implement programs
- If yes what programs have you done this for?
- What organizations have you partnered with?

For all programs listed above please provide any backup information (photos, letters, registration confirmation from a conference, program evaluation sheets, flyers, emails, meeting minutes, etc)

### ***Financial Vitality***

- What is the non-profit status of your chapter?
  - GEN Certified through NSBE
  - Independent 501(c)(3)
  - None
  - Not Sure
- Do you participate in corporate solicitation on a local level
- Do you have other fundraising events
- Do you partner with other organizations for the purpose of fundraising?
- Do you create a budget for your chapter? When? (at the beginning of the year; before each event; never)

Please include your GEN Survey and the letter you received certifying your GEN Status or provide your 501(c)(3) certificate. Please include your budget(s) and your corporate solicitation packet.

### ***Leadership***

- Do you have a transition meeting between chapter executive boards at the beginning/end of each term?
  - Do you invite the previous board to the meeting?
  - Do you only have a transition meeting for the incoming board?
- Do you prepare transition reports for the new people coming in?
  - Do you use the same template every year?

- Did your chapter executive board members receive a transition report?
- Did your incoming chapter executive board members receive files from the previous board?
- Do you encourage your general members to run for positions on the chapter board?
- Did you have contested positions for elections? For President, Vice President, Treasurers, Secretary, Programs Chair, Other Positions?

Please include information from your transition meeting, your transition reports and from your elections.

### ***Connection to the National Society***

#### *Communication with RAEB/REB*

- How often do you communicate with the RAEB?
  - Weekly
  - Monthly
  - Quarterly
  - As I need to talk to them
- Do you have peer to peer communications with the RAEB?
  - If yes – how (conference calls, personal phone calls, emails)

#### *Communication with the AEB/NEB*

- Do you participate in the National Village Calls
  - Which ones did you participate in

#### *Road Shows*

- Did your chapter participate in a regional roadshow (i.e. did a member of the RAEB visit your chapter).
  - If the RAEB member is a member of your chapter did he/she present information from the regional level to your chapter).
- Did your chapter participate in a national roadshow (i.e. did a member of the AEB visit your chapter).
  - What was the outcome (increase in membership; increase in number of people running for chapter leadership; increased participation in programs; other)

#### *Attendance and participation at Regional and National Conferences*

- How many of your members attended the Regional Leadership Conference
- How many of your chapter leaders participated in the Regional Webinar for chapter training
- How many of your members attended the Regional Professional Development Conference/Fall Regional Conference
  - What activities did they participate in
    - TMAL Competition
      - Volunteer
      - Judge
      - Other
    - Judge for Academic Technical Bowl

- Judge for Undergraduate Student in Technical Research
- Certification Training
- Workshop Attendee
- Workshop Presenter/Workshop Facilitator
- Keynote Speaker at an event