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**2023 CHAPTER ASSESSMENT TOOL (CAT)**

**Submissions received late will not be considered.**

**ABOUT THE ASSESSMENT TOOL**

The IAEE Chapter Assessment Tool (CAT) is designed to assist chapter leadership in capturing and reviewing the accomplishments of their chapter over the previous calendar year. In addition, the tool aides IAEE headquarters in establishing and sharing effective and best practices with other IAEE chapters, as well as rewarding chapters of all sizes for their efforts in areas such as chapter management, chapter programming, leadership, social responsibility, student engagement, and more.

Each chapter that successfully completes the assessment tool (based on activity conducted in October 2022- September 2023) and submits it to IAEE HQ by the deadline of Wednesday, 4 October 2023 is eligible to compete for complimentary registrations for *Expo! Expo!* IAEE’s Annual Meeting and Exhibition. There are many great ways to use your complimentary registration. For example, you might:

* Gift the registration to a new chapter member who has never attended *Expo! Expo!*
* Hold a recruitment competition and reward the member who recruits the highest number of new members.
* Honor your chapter’s “Volunteer of the Year.”
* Send a student member to *Expo! Expo!*

**GETTING STARTED**

To begin, simply review the categories in the Excel file attached and select the activities your chapter completed during the calendar year in review, please note those that are mandatory, must be completed to be considered for the complimentary Expo! Expo! registrations. The Excel file should automatically tally your chapter’s points by multiplying the number of points available for a given activity by the number of activities completed in that category.

Next, **compile all attachments that represent your efforts**. For example, you will need to calendar of events, submit newsletters, meeting minutes, photos, a copy of your strategic plan, a flyer used to promote an outstanding educational event, etc.

The final step is submitting your completed Chapter Assessment Tool to IAEE Headquarters. The completed form and all applicable information and attachments should be mailed to the Vice President of Engagement and Digital Strategy, at 12700 Park Central Drive, Suite 308, Dallas, TX 75251 or emailed to [lbuchanan@iaee.com](mailto:lbuchanan@iaee.com)

***no later than Wednesday, 4 October 2023. Late submissions will not be accepted.*** ***Please pay close attention to what is required for your submission and whether you can count an event twice in different categories.***

Once your submission is received and total points are calculated, IAEE will alert each chapter’s chair, vice chair, and administrator regarding the number of complimentary Expo! Expo! registrations they have received. ***Submissions received after Wednesday, 4 October 2023, and incomplete submissions will not be considered.***

**QUESTIONS?**

Contact Director, Membership and Chapter Relations Administrator

[lbuchanan@iaee.com](mailto:lbuchanan@iaee.com) ● 972.687.9231

CHAPTER ACTIVITIES IN 2022/23

Documentation must be provided for each activity in order for points to be awarded. Flyers printed electronic announcements, newsletter articles, descriptions, etc. all serve as acceptable documentation.

|  |  |  |  |
| --- | --- | --- | --- |
| Type of Activity | Points awarded per activity | Number of activities | Total points  (points X # of activities) |
| Educational Activity - **Required**  A program that educates members on an industry-related or professional development topic.  **Please explain activity** | 20 |  |  |
| Social Activity - **Required**  A program that encourages member networking, idea sharing, increasing member-to-member familiarity, etc.  **Please explain activity** | 15 |  |  |
| Rotating Activity - **Required**  A program or activity presented in a geographical area outside of the chapter’s primary market of activity.  **Please explain activity** | 50 |  |  |
| Student Outreach Activity (with a university or student members / nonmembers only)  A program or activity intended to raise awareness of IAEE amongst students, develop or strengthen relationships with students and/or universities, and encourage student membership.  **Please explain activity** | 60 |  |  |
| New Member Recognition Activity - **Required**  An activity designed specifically to recognize new members and encourage member retention.  **Please explain activity** | 40 |  |  |
| Young Professionals Outreach – **Required (student activities are in a separate above, please do not include those activities within this area)**  Any activity intended to engage young professionals (student programs are excluded from this category) For example, a chapter might host a happy hour for young professionals, invite young professionals to volunteer for an event, or provide discounted rates to chapter events for young professionals.  **Please explain activity** | 50 |  |  |

BOARD ACTIVITIES IN 2022

Documentation is required for board planning meeting and best practice submissions.

|  |  |  |  |
| --- | --- | --- | --- |
| Type of activity | Points awarded per activity | Number of activities | Total points  (points X # of activities) |
| 2022 Financial reports submitted to IAEE by deadline – (**Required)**  2022 Jan-July statement by 31 August 2022  2022 July-Dec statement by 15 February 2023 | 30 |  |  |
| 2022 Chapter Board Minutes submitted to IAEE  by 31 December 2022 – (**Required)** | 25 |  |  |
| Held a 2022 Chapter Planning Meeting – (**Required)** | 50 |  |  |
| Established a chapter strategic plan and developed goals and metrics to measure chapter success – submit to IAEE HQ | 50 |  |  |
| Chapter representative attended 2022 Chapter Leaders Forum | 25 |  |  |
| Chapter held a New Board Member Orientation program – include date and agenda in submission | 25 |  |  |
| Submitted Chapter Best Practices to IAEE HQ  Effective practices can be submitted in areas such as chapter management, communications, diversity, networking, programming, volunteer management, social responsibility, member retention, student outreach, etc. | 25 |  |  |

OTHER ACTIVITIES IN 2022

Documentation must be provided for each activity in order for points to be awarded. Flyers, printed electronic announcements, newsletter articles, descriptions, etc. all serve as acceptable documentation.

|  |  |  |  |
| --- | --- | --- | --- |
| Type of activity | Points awarded per activity | Number of activities | Total points  (points X # of activities) |
| Social Responsibility  A program or activity intended to demonstrate community enhancement and social responsibility (i.e. charitable contributions, green initiatives, student mentor programs, professional development for homeless, etc.).  **Please explain activity** | 25 |  |  |
| Volunteer Recognition  Recognizes chapter volunteers for their efforts. For example, activities might range from presenting certificates to hosting a volunteer appreciation reception or nominating candidates for IAEE Awards or IAEE programs.  **Please explain activity** | 40 |  |  |
| IAEE Member Communities  Chapter actively uses IAEE’s MemberLink Chapter page or alternative social networking tool (Facebook, Twitter, LinkedIn) to promote chapter events and engage chapter members in discussions. | 25 |  |  |
| IAEE Chapter Website **(Required)**  Chapter website is up to date with current information and all corresponding links work correctly. The calendar is up to date as well with all activities. | 25 |  |  |
| Please describe your chapter’s strengths: | 25 |  |  |
| Please describe the top two areas in which your chapter needs improvement: | 25 |  |  |
| How can IAEE better serve your chapter’s leaders? | 30 |  |  |
| Other thoughts: |  |  |  |

**REAP THE REWARDS**

Complimentary Expo! Expo! registration(s) will be given to chapters based on the points scale below.

|  |  |  |
| --- | --- | --- |
| **Savoir-faire**  500-600 points  One (1) complimentary  Expo! Expo! registration | **Tour de Force**  601-700 points  Two (2) complimentary  Expo! Expo! registrations | **Crème de la Crème**  701+ points  Three (3) complimentary Expo! Expo! registrations |

|  |  |  |
| --- | --- | --- |
| Total Points Earned | Reward Level | Number of Expo! Expo! registrations |
|  |  |  |