Wisconsin State Council SHRM
New Volunteer Leader Orientation
July 2024

Today's Agenda

Background & Structure

- Who is Wisconsin State Council SHRM?
- Mission Statement
- By-Laws, Code of Ethics, & Policies
- SHRM Volunteer Structure
- 2024 WI SHRM State Council Structure
- Association Management Professional – Morgan Data Solutions

Roles & Responsibilities

- Chapter Leader Requirements & Responsibilities
- Rewards & Reimbursements
- Annual WI SHRM Calendar & Events

Resources

- Volunteer/Core Leadership Areas
- WI SHRM Webpage
- SHRM VLRC
- SHRM VL Playbook
- Microsoft Teams

Background & Structure
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Who is Wisconsin State Council SHRM?

The Wisconsin SHRM Council represents human resource professionals in the State of Wisconsin and is an affiliate organization of the national Society for Human Resource Management (SHRM), a non-profit professional association founded in 1948. SHRM is the world's largest association devoted to human resource management with over 300,000 individual members.

SHRM is divided into five regions across the country. The Wisconsin Council SHRM is part of the **North Central Region**. The North Central Region is made up of the following states: Wisconsin, Illinois, Minnesota, Iowa, North Dakota, South Dakota, Michigan, Indiana, Ohio, and Nebraska. Wisconsin has 18 local SHRM chapters across the state, each that provide programming and networking opportunities in the local area. In addition, there are 11 student chapters which connect students attending 2-year and 4-year colleges with SHRM.

What is Wisconsin State Council SHRM's Mission?

Wisconsin State Council SHRM's mission is to share expertise and facilitate thought leadership to advance human capital practices across Wisconsin. With a goal of developing professionals and serving the HR profession, the Wisconsin State Council is a communication link between the chapters, council leaders and national SHRM.

What is Wisconsin State Council SHRM's Mission?

We provide…

- A forum for the exchange of ideas and information concerning chapter administration and the HR profession.

- A structure for our members to consult together on the needs and concerns of the profession enabling HR professionals to increase their knowledge and make informed decisions to contribute to business success.

- Comprehensive information, tools, conferences and other leadership development opportunities to meet the needs of its members in order to progress the profession and society as a whole.

- A connection with SHRM members within the state who are not affiliated with any specific chapter – at-large members.

What is Wisconsin State Council SHRM's Purpose?

- Adopt programs which will promote the progress and welfare of the profession and the Society as a whole.

- Facilitate information sharing between chapters, among the council leaders, and the SHRM Board of Directors.

- Provide a structure for its members to consult together

- Assess/meet the needs of members and chapters

- Coordinate legislative initiatives

- Provide leadership development opportunities

- Communicate with SHRM at-large members

Wisconsin State Council SHRM By-Laws, Code of Ethics and Policies

- WI SHRM By-Laws: https://wishrm.org/proxy/files/Officers%20Corner/Bylaws/WISHRM%20Council%20Bylaws%20Effective%202021-03-01%20-%20Signed%20Copy.pdf

- WI SHRM Chapter By-Laws (on file): https://www.wishrm.org/index.php?module=cms&page=26

- WI SHRM Code of Ethics: https://wishrm.org/proxy/files/Officers%20Corner/Code%20of%20Ethics-Conflict%20of%20Interest%20Policy/Conflict%20of%20Interest%20Policy%20FINAL.pdf

- WI SHRM Policies – Located on MS Teams (WISHRM – General – Files)

Wisconsin State Council SHRM Chapters

Where are We Located?

LOCAL SHRM-AFFILIATED CHAPTERS

Northwest
- Chippewa Valley SHRM
- La Crosse Area SHRM
- St. Croix Valley Employers Association

(Note: Pending merger of West Central SHRM with La Crosse Area SHRM)

Southwest
- Blackhawk Human Resource Association
- Dodge County SHRM
- Jefferson County HR Management Association
- Sauk Columbia SHRM

Southeast
- Greater Madison Area SHRM
- Metro Milwaukee SHRM
- Racine & Kenosha Area SHRM

Northeast
- Fond du Lac SHRM
- Green Bay Chapter SHRM
- Lakeshore Area Human Resources Association
- Sheboygan Area SHRM

North Central
- Central Wisconsin SHRM
- Fox Valley SHRM
- Oshkosh Area SHRM
- Stevens Point Area Human Resources Association

Wisconsin State Council SHRM
Student Chapters

- Blackhawk Technical College
- Lakeshore Technical College
- Marquette University
- Moraine Park Technical College
- St. Norbert College

- UW - Green Bay
- UW - Madison
- UW - Milwaukee
- UW - Oshkosh
- UW - Stevens Point
- UW - Whitewater

ABOUT SHRM VOLUNTEER STRUCTURE

Network of Chapters, State & Regional Councils & Membership Advisory Council

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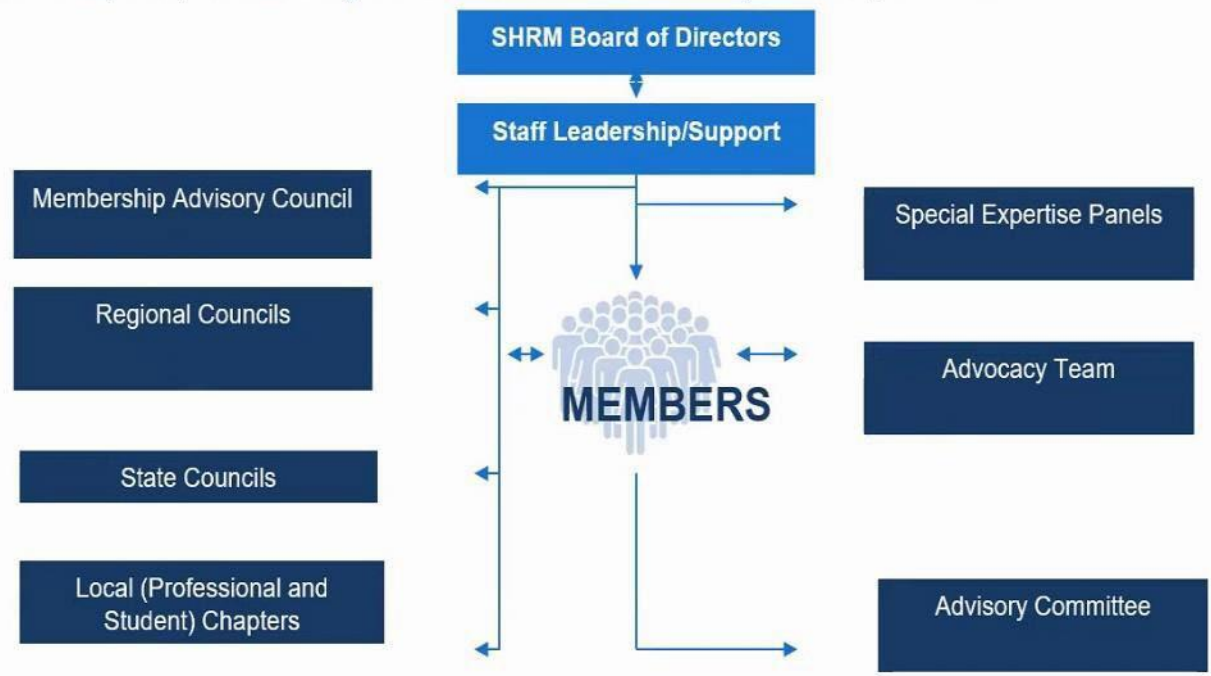
SHRM Volunteer Leader Structure - Detail

SHRM Board of Directors

The Board of Directors provides leadership for SHRM by:
- Upholding SHRM's vision, purpose and values;
- Setting the broad policies, direction and priorities of the organization;
- Ensuring that SHRM has highly effective leadership;
- Providing fiduciary oversight; and
- Maintaining the integrity of SHRM services and products developed for the benefit of SHRM members

The 14-member board is elected by SHRM members. More information about the SHRM Board of Directors may be found here: https://www.shrm.org/about/board-of-directors-and-executive-staff

SHRM Volunteer Leader Structure - Detail

SHRM Leadership and Staff

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

Members & Community Director, Jenny Locanthi SHRM-SCP

- Main point of contact for State Councils, Chapter Presidents and other chapter volunteers in their assigned states/territories
- Communicates and promotes SHRM vision and strategic objectives
- Ensures that chapters maintain affiliation standards

Member Engagement Associates (MEAs)

SHRM.MemberRelations@SHRM.org

- Serve as key points of contact for all Chapter and State Council Volunteer Leaders.
- Assists with volunteer inquiries, provides Volunteer Leaders with reports, assists with roster management, executes email marketing campaigns and audits, updates board information, and more.
- MEAs serve as the communication channel to all Volunteer Leaders on important SHRM updates, reminders, and deadlines.

SHRM Volunteer Leader Structure - Detail

SHRM Membership Advisory Council Rep

The Membership Advisory Council (MAC) serves as an interface between the volunteer leaders and the SHRM Board of Directors. The MAC is composed of one elected representative from each of the Regional Councils. The MAC provides input from the membership through the regional councils to the board and feedback from the board to the membership, back through the regional councils; and provides operational input to SHRM to ensure optimum service/support to and from the volunteer leadership.

North Central Region MAC Representative, Jason Sutheimer

2024 Wisconsin State Council SHRM Board of Directors

State Director
Connie Bitter

State Director-Elect
Jeff Palkowski

Past State Director
Vacant until 2025

Secretary
Kelsie Beckfield

Conference Liaison Director
Leah Rozeski

Treasurer
Lisa Henke

Executive Committee

BETTER WORKPLACES
BETTER WORLD

2024 Wisconsin State Council SHRM Board of Directors

Certification Director
Kortney Jenks

College Relations Director
Alexis Outlaw

Communications / Social Media Director
Jeff Palkowski

Diversity, Inclusion, Workflex Director
Tanya Hubanks

SHRM Foundation Director
Sheree Yates

Leadership Director
Jen Zahari

Legislative Director
Jay Stephany

Membership Director
Jen Jirsa

Partnership & Sponsorship Director
Amy Doepke

2024 Wisconsin State Council SHRM Board of Directors

Programming Director
Taylor Forshee

Workforce Readiness Director
Kellie Dunn-Poggemann

District Director Northeast
Pam Berkovitz

District Director Northwest
Dani Stuhr

District Director North Central
Katelyn Spanbauer

District Director Southeast
Brittany Hanson

District Director Southwest
Mary Vogl-Rauscher

Chapter Presidents
(18)

Treasurer-Elect
Annie Goffard

2024 Wisconsin State Council SHRM Board of Directors
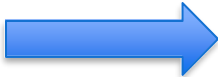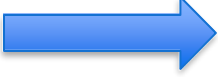
Membership Director Elect
Jane Kurylo

College Relations Director Elect
Emily Blakeslee

Leadership Director Elect
Vacant

BETTER WORKPLACES
BETTER WORLD™

WI SHRM Structure Clarification

- WI SHRM Full State Council

- WI SHRM Core Council

- Executive Team

→

- Core Council, including Chapter Presidents

- Core Council, Chapter Presidents optional

- State Director, Director-Elect, Past State Director, Secretary, Treasurer, Conference Liaison Director

WI SHRM Association Management Professional

Morgan Data Solutions

WI SHRM State Council Administration

4075 Vilas Road

Cottage Grove, WI 53527

Phone: 608-204-9827

wishrm@morgandata.com

Owners: Christopher & Heather Dyer

Primary Contact: Megan Cuccia

<u>Roles & Responsibilities</u>
•Chapter Leader Requirements & Responsibilities
•Rewards & Reimbursements
•Annual WI SHRM Calendar & Events

Chapter Leader Requirements & Responsibilities

1. All affiliation Standards Maintained:
   - **SHAPE** (SHRM Affiliate Program for Excellence)
     - The SHAPE year-end report is a checklist of 12 items in two parts. Completing all items in Section 1 is required of all chapters to remain in "good standing." Section 2 is optional however, all items in Section 1 and Section 2 must be completed to qualify for an Excel Award and later, a Pinnacle Award. **Due annually by January 31st.**
   - **CLIF** (Chapter Leader Information Form)
     - This provides SHRM with an updated list of your chapter's leaders and their contact information. This is completed by logging into the Affiliate Management Portal (AMP) and is **due annually by December 1st.**
     - **Volunteer Leader Information – Update Form** is whenever there are one-off or limited updates/changes to either add or remove volunteer leaders.
2. Responding to Wisconsin Chapter Membership List Requests (up to 2x per year)
3. 100% State Council Meeting participation (4 meetings per year with 1 optional Core Council Meeting (In addition, attendance at a District Director meeting typically held in May)
4. Updated and current Board contact and programming information on chapter website
5. Participation in the Annual Membership Initiative

Chapter Leader Requirements & Responsibilities

6. Promotion of chapter member attendance and volunteering at WI SHRM Conferences/Events – Workplace Policy Conference, Student HR Conference & Case Competition and HR Games, Volunteer Leaders Conference, State Conference, etc.
7. Annual State Conference support – SHRM Foundation silent auction donation, membership booth, events, volunteering, etc.
8. Promotion of other WI SHRM initiatives (Workforce Readiness, Diversity, Inclusion and Workflex Award, Enterprising Leadership Award, etc.)
9. Chapter attendance on SHRM Core Leadership Area webcast(s) (e.g. membership, foundation, diversity, certification)
10. Notifying your State Council Director or District Director with any concerns within your chapter
11. Understanding your non-exempt tax status/filing your Form 990
12. Attending WI SHRM Council events in person whenever possible
13. Completing your annual SHRM Recertification Provider Reaffirmation

2024 Chapter Reimbursement Reward Program

- Up to $500 (set in $100 increments based on meeting requirements, membership rosters and WI SHRM required active links on chapter website) awarded to attend the Annual SHRM Volunteer Leaders' Business Meeting (VLBM) in Washington, D.C.

    - Specific criteria to be shared by the WI SHRM Treasurer

- Free Registration - State Conference Registration ($575 value)

- Note: Details can be found in the WI SHRM Teams platform under Documents/General/Chapter Benefits Information.
- To submit for reimbursement for VLBM, the form can be found in the Forms Expense and Policy folder.

2024 Chapter Reimbursement Reward Program

Membership Initiative – up to $500	% of Membership Growth initiative	% SHRM Certification Growth initiative
% State Conference profits for % attendee registration **OR** for chapter member participation on conference committee	$100 per job posting via WI SHRM Job Bank	Enterprising Leadership Award – up to $6,000

WI SHRM State Conference Revenue Distribution Model for Chapters

Encourage your chapter members to attend the WI SHRM State Conference and your chapter may be rewarded! **Visit the Website**

State Conference Distribution Model Payout determined by chapter members who:

- Serve as a Co-Chair
- Serve on the State Conference Committees
- Attend the State Conference
  - Registration will track paid attendees from each chapter
  - Payback will be based upon the percentage your chapter's members attending out of your chapter's total membership

WI SHRM Annual Calendar

For specific dates, visit the [WI SHRM Events Calendar](#)

January
- New Chapter Leader Orientation
- SHAPE Due – January 31st

February
- WI SHRM Workplace Policy Conference
- WI SHRM Full State Council Meeting

March
- Excel Award Applications Due – March 15th

April
- WI SHRM Core Council Meeting (Chapter Presidents optional)

May
- WI SHRM District Director Meetings with Chapters

June
- SHRM Annual Conference & Exposition

WI SHRM Annual Calendar

For specific dates, visit the [WI SHRM Events Calendar](#)

July
- New Chapter Leader Orientation

August
- WI SHRM Volunteer Leaders' Conference
- WI SHRM Full State Council Meeting

September

October
- WI SHRM State Conference
- WI SHRM Full State Council Meeting

November
- SHRM Volunteer Leaders' Business Meeting (Chapter Presidents or President-elect invited)

December
- CLIF Due – December 1st
- WI SHRM Strategic Planning and Networking Session
- WI SHRM Full State Council Meeting

Resources
- Volunteer/Core Leadership Area (CLA)
- SHRM Excel & Pinnacle Awards
- WI SHRM Webpage
- SHRM VLRC
- Microsoft Teams

Core Leadership Area – Membership (Jen Jirsa)

- Chapter Membership Directors, please provide SHRM with your chapter's membership updates by the 5th business day prior to the end of the month to be processed for that month.

- Send the [Membership Engagement Associate](#) a list of the new SHRM members in the chapter, as well as those SHRM members who have left the chapter.

- SHRM member's name is required to properly code the individual to your chapter

- Dual members only count toward your chapter if they designate your chapter as their primary chapter.

- Connect with your SHRM [Membership Engagement Associate](#) if you feel your membership numbers aren't accurate or if you have report questions.

Core Leadership Area – Membership Reports

The Value of Membership Information

- Membership reports are sent to Chapter Presidents quarterly from SHRM

- Membership report covers:

    - SHRM In-Chapter Membership (multiple quarter/year look back)

    - Chapter Size (Small, Medium, Large, Mega)

    - Total Members in Chapter (SHRM and Non-SHRM)

    - Chapter Affiliation percentage

    - Number of Certified SHRM Members

Core Leadership Area – Membership

Members at Large

- At-Large Members are National SHRM members who have not associated with a SHRM Chapter
- To build local membership, you can use a Member at Large list 'owned' by National SHRM
- You can market to national SHRM members 2 x / year by requesting mailing labels from National SHRM
- You can request an Email Marketing Blast – once per quarter by completing the form on the VLRC

Core Leadership Area – Membership
Dual Membership Release Program

How could the Dual Membership Release Program help your chapter?

- Streamlines the join and renew process for Chapter members

- Greatly reduces membership admin burden

- Provides daily reporting on transactions and Chapter membership roster

- Eliminates annual audits

- Increases Chapter Financial Support Payments (CFSP)

- Provides greater access to potential members by leveraging SHRM's robust marketing engine

Core Leadership Area – Membership

Dual Membership Release Program

"One Stop Shopping" to allow members to join and renew both their National and Chapter memberships in one transaction.

SHRM + CHAPTER

One transaction. One profile. Dual membership.

Add Chapter to your SHRM Membership

Click "Sign in" below, then select your state and Chapter from the drop down box, and follow the steps!

SIGN IN

Join/Renew SHRM and Your Chapter

Click "Join/Renew Now" below, and follow the steps. Be sure to add your Chapter.

JOIN / RENEW TODAY

To learn more about the Dual Membership Release (DMR) program and how your Chapter can benefit from joining, please reach out to your SHRM Field Service Director (FSD).

Core Leadership Area – Certification (Kortney Jenks) Resources

- **SHRM Certification** – https://www.shrm.org/credentials/certification

- **SHRM Certification Handbook –** https://www.shrm.org/credentials/certification/shrm-certification-handbook

- **SHRM Certified Professional (SHRM-CP)** qualifications, obtain information here: https://www.shrm.org/credentials/certification/shrm-cp

- **SHRM Senior Certified Professional (SHRM-SCP),** qualifications, obtain information here: https://www.shrm.org/credentials/certification/shrm-scp

- **Recertification Information** – https://www.shrm.org/credentials/certification/recertification

Core Leadership Area – Communications & Social Media (Jeff Palkowski)

Ways to Get and Keep Connected:

- [Forward HR Magazine](#)

- [Current Job Listings](#)

- Find us on [Facebook](#)

- Follow us on [X](#)

- Connect with us on [LinkedIn](#)

- Chapter programming can be shared on WI SHRM social media channels

- News and Updates on [WISHRM.org](#)

SHRM Excel Awards

AWARD CATEGORIES

The Excel Awards recognize achievements by SHRM Chapters and State Councils in four categories:

DUAL MEMBERSHIP ACQUISITION AND RETENTION	*Required for all Chapters or State Councils to be considered for any award.* Initiatives that support and foster the acquisition and retention of dual members (members of both SHRM and a local Chapter). Activities may include initiatives around professional members/non-members, Emerging Professionals, students, nontraditional HR professionals, etc.
SERVING HR PROFESSIONALS	Initiatives that support and promote professionals with HR responsibilities to be successful business leaders. Activities may be related to SHRM-CP and SHRM-SCP certification/recertification, competency-based professional development, or skills development.
ADVANCING THE HR PROFESSION	Initiatives that advance the HR profession by creating awareness with or supporting key constituents including workplace, government, and regulatory representatives; employers; schools; media; and the community at large. Activities may include outreach and awareness programs, government, or public affairs, raising funds, and supporting the SHRM Foundation's annual initiative to build inclusive organizations, or they may involve a focus on key issues such as inclusion, diversity and workforce readiness.
ENHANCING THE SHRM COMMUNITY	Initiatives that provide programs and services that support SHRM, meet members' needs, or further the Chapter or State Council efforts. Activities may include efforts to foster member engagement, volunteer development and recognition.

SHRM Excel Awards

Award Levels

There are four award levels: Bronze, Silver, Gold and Platinum. A minimum of one Dual Membership Initiative **AND** one additional initiative are required for award consideration, with the number of required initiatives increasing for each award level. At least one initiative must focus on dual membership (i.e., acquisition, engagement or retention of members of both a local chapter and SHRM) for each award level. See chart below.

AWARD LEVEL	NUMBER OF REQUIRED INITIATIVES
Bronze	Dual Membership + 1 additional initiative
Silver	Dual Membership + 2 additional initiatives
Gold	Dual Membership + 3 additional initiatives
Platinum	Dual Membership + 4 additional initiatives

SHRM Excel Awards

How do you Apply for an Excel Award?

If you have completed Sections I and II of the Chapter or State Council SHAPE year-end report and submitted the report by the deadline, you have the option to apply for an Excel Award. Excel Award online applications are available in the SHAPE Center of the [Volunteer Leader Resource Center (VLRC)](). All Excel Award applications are due by March 15th. Note: Your Excel Award application may be submitted any time following successful submission of both Sections I and II of the SHAPE year-end report, but no later than the March 15th deadline.

SHRM Excel Awards

How do you Apply for an Excel Award?

STEP I

Please indicate the Excel Award level you are seeking:

- Bronze (1 initiative)
- Silver (2 initiatives)
- Gold (3 initiatives)
- Platinum (4 initiatives)

At least one (1) initiative must focus on dual membership (i.e., acquisition, engagement or retention of members of both a local chapter and SHRM) for each award level.

SHRM Excel Awards

How do you Apply for an Excel Award?

STEP II

For award consideration at any Excel Award level, briefly describe each initiative's topic in 25 words or less, select the award category and then respond to each of the questions below.

INITIATIVE TOPIC	25 words max
Award Category (please select one)	• Dual Membership Acquisition and Retention • Serving HR Professionals • Advancing the HR Profession • Enhancing the SHRM Community
What was your goal/objective? How is this goal strategic?	75 words max
What did you do to work toward/ accomplish this goal?	200 words max
What was the outcome/result?	75 words max

SHRM Pinnacle Awards

The SHRM Pinnacle Award Program is an annual recognition program honoring the highest achievements in affiliate development and contributions that serve HR professionals, advance the HR profession and enhance the SHRM community. SHRM chapters and state councils are encouraged to apply for a Pinnacle Award for innovative projects created and implemented by your SHRM affiliate.

SHRM Pinnacle Awards

Award Levels and Categories

Award Levels	Award Categories
Small Chapters (10 to 100 members)	• Serving HR Professionals • Advancing the HR Profession • Enhancing the SHRM Community
Medium and Large Chapters (101 to 500 members)	• Serving HR Professionals • Advancing the HR Profession • Enhancing the SHRM Community
Mega and SuperMega Chapters (500+ members)	• Serving HR Professionals • Advancing the HR Profession • Enhancing the SHRM Community
State Councils	• Serving HR Professionals • Advancing the HR Profession • Enhancing the SHRM Community

SHRM Pinnacle Awards

Special Category

SHRM Workplace Impact Award

The SHRM Pinnacle Award features a special category showcasing affiliate initiatives designed to engage untapped talent. In addition to our twelve annual "traditional" winners, one chapter or state council's Pinnacle Award entry will be selected to receive the SHRM Workplace Impact Award for a project or initiative undertaken in the "untapped talent" arena.

All SHRM-affiliated chapters and state councils in good standing are eligible to submit their Pinnacle Award submission for additional Workplace Impact Award consideration. The initiative must focus on engaging untapped talent pools (including, but not limited to, individuals with disabilities, military veterans, individuals with criminal records and the aging workforce.)

SHRM Pinnacle Awards – Application Tips

- **Awards are judged on the standards of excellence**
- Set Goals--What is your chapter doing that is **extraordinary**?
- Best to apply when you have results versus applying while your project is "in progress"
- Your project should be something that other chapters are able to replicate for their own use
- Application process is similar to writing a grant proposal
- Having a memorable or "catchy" title is important
- Reach out to past WI SHRM Winners
    - Green Bay SHRM – Chapter Award Winner 2023
    - SHRM Dodge County – Chapter Award Winner in 2015, 2017, 2021
    - Metro Milwaukee SHRM - 2017
    - Note: These were written and submitted like a grant

SHRM Pinnacle Awards – Application

SHRM Pinnacle Award/Workplace Impact Award Application Window: June 1 - September 1

To apply, visit the [Volunteer Leaders Resource Center (VLRC)](#) and search for "Pinnacle Award" for the application and instructions

Be sure to bookmark www.wishrm.org

- Council Leadership Roster
- Calendar of Events Council & Chapter
- Chapter Website Links
- WI SHRM Conferences
- Job Board

SHRM Volunteer Leader Resource Center - VLRC

Be sure to bookmark vlrc.shrm.org

SHRM Volunteer Leader Playbook

The SHRM Volunteer Leader Playbook can be found at
https://vlrc.shrm.org/s/article/SHRM-Volunteer-Leader-Playbook

Affiliate Management Portal (AMP)

Be sure to bookmark https://vlrc.shrm.org/s/affiliate-management-portal

You must be logged in to the VLRC in order to access your Chapter AMP.

| Home | Resources ⌄ | Affiliate Management Portal ⌄ | Campaign In A Box | Volunteer Exchange | Contact Our Team | SHRM Connect |

Volunteer Leader Resource Center

Login to the Volunteer Exchange to start connecting with your fellow Volunteer Leaders now!

Volunteer Exchange

These seven Volunteer Leaders have access to the AMP:

| Chapter President | President-Elect | Past President |
| Certification Director | Membership Director | Treasurer |
| Chapter Management Professional | | |

WI SHRM Microsoft Teams

In 2020, WI SHRM migrated to Microsoft Teams to provide
Council members access to:
- Microsoft Office Tools
- Microsoft Outlook (with *.wishrm.org email addresses)
- Microsoft Teams for chat, video conferencing, and file storage
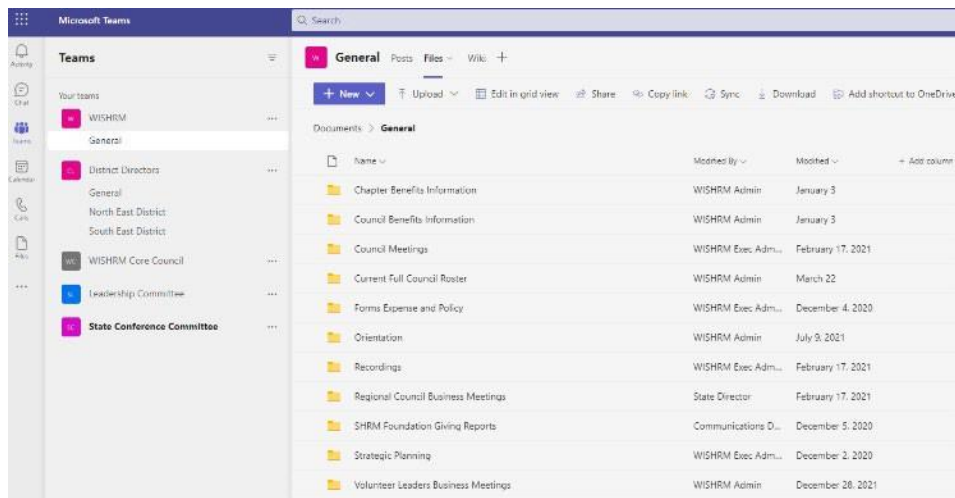
Please contact:
wishrm@morgandata.com
for login assistance to
WI SHRM Teams

Any Questions?

Contacts

Please reach out to your 2024 District Directors:

- Northwest District – Dani Stuhr – nwdistrictdirector@wishrm.org
- Southwest District – Mary Vogl-Rauscher – swdistrictdirector@wishrm.org
- Southeast District – Brittany Hanson – sedistrictdirector@wishrm.org
- Northeast District – Pam Berkovitz – nedistrictdirector@wishrm.org
- North Central District – Katelyn Spanbauer – ncdistrictdirector@wishrm.org

- WI SHRM Admin – Megan Cuccia – wishrm@morgandata.com

Thank You!

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