**Chapter Report TEMPLATE**

# **Preparation Instructions:**

# Fully read this page

# Download the Word document and complete with your chapter

# Remove this page in the final submission

# Rename the template to R#\_Chapter\_name\_YEAR.doc

# Replace and/or remove all text in gray highlight

# Complete with chapter leadership and save as a .pdf

# Upload into chapter's data system (e.g., Google drive, etc.)

**About the Template:**

# This page is to be removed and not be part of the submission

# This template is for both Professional and Student chapters

# This template is for chapter reports 1 & 2

# Items not highlighted are the **requirements** and should be in the final .pdf submission

# Items highlighted in gray are for guidance and shall be updated with chapter's own details and/or removed

# For review, feedback, and chapter awards consideration:

# Chapter reports 1 & 2 shall not exceed eight (8) pages

# Text sizes and page setup limits in this template shall be followed

# **DO NOT CHANGE** font sizes, styles, colors, page margins

# **Submissions instructions**:

# Document shall be in .pdf format, no exceptions

# Create a weblink to the document and submit by the deadlines to the submission form below

# After submitting the report, no changes and/or additions to the report shall be accepted, report must be complete upon submission

# Make sure the weblink has "anyone with the link can access" access capability before submitting

# Submit Report 1 with Q2 Check-in; Report 2 with Q4 Check-in: https://www.surveymonkey.com/r/SHPE\_CheckIn

Society of Hispanic Professional Engineers

Chapter Name, Region #

National Chapter Program: Report #, YEAR

# Cover Page [0 points, 1 page max]

## Chapter Contact Information

Include address, phone number, and email

## Chapter Advisor Information [Student chapter only]

Include email address and phone number

## Chapter Website Link

Website **must** include the following:

SHPE Mission/Vision

Chapter bylaws

Links to SHPE Website

Chapter History

Chapter Calendar of Events

Current Executive Board contact information

## Chapter Social Media & Marketing Information

Include all links to the chapter social media

## Chapter Management Tools Link

Provide link to the CMT here, ensure it has "anyone with link can view" level access

Do not resubmit the CMT when submitting the chapter report

Update the Executive board information in the Chapter Management Tool

##

# Chapter Highlights [0 points, 1 page max]

**Chapter Highlights is required for award eligibility**.

**REQUIREMENTS:** The following items are required and be provided in bullet point format. Figures, tables, and pictures are encouraged, but not required.

* For all Awards, provide:
	+ Five key major and/or unique accomplishments of significance (one bullet point for each) achieved directly from using the CMT
	+ For student chapters, these five highlights must be in the areas of recruitment, retention, and post-graduation successes of members
	+ For professional chapters, these highlights must be in the areas of recruitment, retention, and influence in the community and the careers of SHPE members
* **Hints:** Five major and/or unique accomplishments of significance specifically related towards realizing the SHPE Mission and Vision
	+ Realizing the SHPE Mission and Vision includes recruitment, retention, and post-graduation success (students) or career and community influence (professionals)
	+ The key highlights can also be described using the SHPE Pillars

# Member Recruitment Activities [6 points, 2 page max]

# Include:

# A. CMT-Planned Activities Specific to Recruitment (outlined below)

B. CMT-Obtained Outcomes Specific to Recruitment (outlined below)

C. Lessons Learned Specific to Recruitment (outlined below)

# Member Retention Activities [6 points, 2 page max]

# Include:

# A. CMT-Planned Activities Specific to Retention (outlined below)

B. CMT-Obtained Outcomes Specific to Retention (outlined below)

C. Lessons Learned Specific to Retention (outlined below)

# Member Success [6 points, 2 page max]

# Include:

# A. CMT-Planned Activities Specific to Member Success (outlined below)

B. CMT-Obtained Outcomes Specific to Member Success (outlined below)

C. Lessons Learned Specific to Member Success (outlined below)

# **Section Details:**

# **CMT-planned Activities [Half of a page]**

Summarize the chapter's CMT-planned activities (e.g., events, programs, workshops) in chronological order in the format below. For all chapter activities listed, mention the value provided to SHPE members. Use your CMT and Section I of your chapter plan to complete this section. Specifically reference the SMART objectives in the CMT that were completed. Utilize the SHPE chapter pillars to organize your responses.

**Summary of the Chapter Plan**

* In four sentences or less, state the major chapter accomplishments as of the previous year’s report

**Activities Summary** Provide a summary of major activities referencing the chapter plan

* ***Recruitment*** - Example: Describe website and/or marketing efforts to recruit incoming college students or professionals.
* ***Retention***- Examples: Detail the mentoring, events, programming, and resources that continuously provide awareness, access, support and development of the SHPE chapter members.
* ***Member success (Post-Graduation)*** (Student Chapters only) - Examples: Highlight the number of students graduating college (both undergraduate and graduate students) and their success(es) in transitioning to the workforce (includes graduate school, entrepreneurship, and industry). Mention if chapter has a Graduate Ambassador, graduate students serving as mentors, and/or initiatives to increase undergraduate student access to research opportunities.
* ***Member success (Influence in the community and careers)*** (Professional Chapters only) - Examples: Highlight the efforts towards increasing STEM career awareness, access, support, and development for the Hispanic community; Document upward career mobility programming and resources; Describe engagement with the local community and SHPE student or junior chapters.

Examples of accomplishments to consider mentioning:

* Participation in SHPE national events and programs (e.g., SHPE Conference, SHPEtech, NdC, ScholarsSHPE, SHPEtinas, RLDC, NILA, LatinXfactor, MentorSHPE),
* Events and local programs focused on academic excellence and graduate school (e.g., meetings focused on access to technical research opportunities on and off-campus, graduate school informational session, and research collaboration between undergraduate and graduate members),
* Events focused on graduate student development,
* Interaction with the regional leadership (e.g., RVP, RSR, RGR) and regional meetings, and/or
* Evaluation methods for events and how the chapter is working to improve the post-graduation success of undergraduate and graduate students (student chapters) and influence in the community and careers of the members (professional chapters).

For maximum points in this section, closely review the chapter report rubric in the guidelines and mention the value provided (i.e., learning objectives) and the outcomes.

**Future Activities**

* In three or less sentences, state next steps, plans, future expectations for growing and/or strengthening the chapter over the next 3-6 months

# **CMT-obtained Outcomes [A page]**

Summarize the chapter's outcomes using metrics (e.g., tables, figures). For all the metrics, provide the context/significance as to why/how each metric is important. Avoid using words. Present comparison with results from previous years. In results/plots, identify which SMART objectives in the CMT were completed. Figures and captions must be clearly labeled and be readable, and document past and current progress made from events. Utilize the applicable SHPE chapter pillars to organize the information.

* ***Recruitment*** - Examples: Breakdown (e.g., pie or bar chart) of the number of recruiting events and their effectiveness to recruit new SHPE members; website or social media traffic; marketing efforts to recruit incoming college students or professionals to become SHPE members.
	+ **Provide the total number of new paid SHPE members that were recruited.**
	+ ***Chapter Volunteer Hours*** Provide a table with the total number of chapter volunteer service hours. For Chapter report 1: July 1st to January 15th, for Chapter report 2: January 16th to June 15th. Volunteer hours include time for planning and meetings with chapter executive board members, working with SHPE Jr chapters, and/or recruiting students/professionals. Example: The president running the meeting with nine other board members for one (1) hour is equivalent to 10-chapter volunteer hours.
* ***Retention*** - Examples: Survey results or attendance records for events (e.g., pie or bar chart) (for student chapters, include graduate students); relate current attendance and participation results to previous year’s results; Describe market reach (e.g., number of chapter members given number of Hispanic students in STEM and/or the local area).
	+ **Provide the total number of returning/retained paid SHPE members.**
	+ ***MentorSHPE efforts*** - Examples: Chapter organized mentoring activities, event or program structure (e.g., freshmen matched with upper class students, senior level students matched with professionals); provide data of number of mentors and mentees participating.
* ***Member Success (Post-Graduation)*** (Student Chapters only) - Examples: Report the number of SHPE members that will graduate from both undergraduate and graduate degrees (e.g., table or bar chart); describe their successes (e.g., transitioning to employment, graduate school, entrepreneurship) and plans to join a professional SHPE chapter; report if there is a chapter graduate representative, number of graduate student members and mentors, and events focused on research opportunities and graduate education.

**Provide the number of graduating SHPE members and percentage of those members that became members of SHPE professional chapters.**

* ***Member Success (Influence in the community and careers)*** (Professional Chapters only) - Examples: Report progress towards increasing STEM career awareness, access, support and development for the Hispanic community (e.g., pie chart of number of people that interacted with SHPE members); describe upward career mobility successes by the chapter members (e.g., number of hours in career education, promotions); describe engagement with the local community and student or junior SHPE chapters.

Examples:

* Financial information, number of members who are officers in other organizations;
* Collaborations with other organizations;
* Number of graduate students and whether the chapter has a graduate student representative;
* Chapter awards (local university/companies or in the community);
* Number of job promotions, internships, students participating in scientific research programs, student mentor pairings, publications, and awards; and/or
* Attendance at SHPE Conferences, contributions in the SHPE national newsletters.

# **Lessons Learned [Half of a page]**

Discuss the chapter's lessons learned. Follow the following format of providing lessons learned. Use the chapters CMT’s SWOT analysis and chapter schedule to complete this section. Provide information using bullet points with a maximum of one sentence per bullet point. Be concise. Do **NOT** supply paragraph-size bullet points. Utilize the applicable SHPE chapter pillars to organize your responses.

* ***Value provided to the members*** - What events/functions/programs are appreciated and valued by the chapter members, see notes from chapter's SWOT analysis
* ***Planning and implementation of the value*** - via chapter plan and events
	+ Efforts in obtaining resources and funds to enact chapter's plans and events
	+ Recruitment, retention, and post-graduation success of members (students) and influence in community and careers of members (professionals)
* ***Evaluation of the Value provided*** - via surveys results, testimonials, internships obtained, promotions, thank you emails, completed documents (e.g., resumes, scholarships, fellowships, promotions)

# Support Needed [0 points, 1 page max]

Discuss the chapter's needs for support. Provide information using bullet points with a maximum of one sentence per bullet point. Be concise. Do **NOT** supply paragraph-size bullet points. Utilize the applicable SHPE chapter pillars to organize your responses. Use notes from chapter's SWOT analysis in the CMT to complete this section. Describe support needed as specifically as possible (e.g., mention the need for support from SHPE leaders, staff, NBOD, university administrators, local companies, local community, local schools).

* ***Value provided to the members*** - List the areas and individuals that the chapter needs aid in developing and supplying value to the members for their success
* ***Planning and implementation of the Value*** - Via chapter plan and events; list the areas and individuals that the chapter leadership and membership need guidance and/or resources in planning and implementing events and activities that supply value to the members
	+ Efforts in obtaining resources and funds to enact chapter's plans and events
	+ Recruitment, retention, and post-graduation success of members (students) and influence in community and careers of members (professionals)
* ***Evaluation of the Value provided*** - List the areas that the chapter needs education, guidance, and/or resources in deciding metrics and systems to evaluate the provided value to the members