Society of Hispanic Professional Engineers
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National Chapter Program

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Mission & Vision

SHPE changes lives by empowering the Hispanic community to realize its fullest potential and to impact the world through STEM awareness, access, support, and development.

SHPE's vision is a world where Hispanics are highly valued and influential as the leading innovators, scientists, mathematicians, and engineers.

NCP templates: https://shpe.org/membership/chapter-resources/

Check-in and Report Submit Link:

https://www.surveymonkey.com/r/SHPE_CheckIn

Definitions and Acronyms

- **CMT** - Chapter Management Tool
- **College graduate** – a student that has graduated from a collegiate institution with an associates, bachelor's, master's, or Doctoral Degree
- **Graduate student** – a student currently enrolled in advanced program (Master's or Doctoral program)
- **ERG** – employee resource group
- **NBOD** - National Board of Directors
- **NGC** - National Graduate Committee
- **NCP** - National Chapter Program
- **RGR** - Regional Graduate Representative
- **RJR** - Regional Junior Representative
- **RSR** - Regional Student Representative
- **RVP** - Regional Vice President
- **SHPE quarter** - three months with Q1: July 1st – September 30th, Q2: October 1st – December 31st , Q3: January 1st – March 30th, Q4: April 1st – June 30th
- **SHPE year** - Starts on July 1st and ends June 30th
- **STEM workforce representative** - a non-SHPE member representative from the STEM workforce, not part of SHPE chapter and/or executive board
- **SHPE community representative** - SHPE Lifetime members, SHPE STAR Awardees, SHPE Industrial Partnership Council (IPC) members, SHPE student chapters, SHPE Jr chapters, and SHPE chapter advisors and not part of the SHPE chapter and/or executive board
- **SMART** - Specific, Measurable, Attainable, Relevant, and Timely
- **STEM** - Science, Technology, Engineering, Mathematics
- **SWOT** - Strengths, Weaknesses, Opportunities, and Threats analysis tool
- **Student** - full-time enrolled student at a collegiate institution that is pursuing either an Associates or bachelor's degree (undergraduate) or is in pursuit of an advanced degree (e.g., master's or Doctoral Degree) (graduate)
- **Professional** - an individual that has graduated with a STEM degree and is currently practicing and/or seeking employment within the STEM workforce

1 Introduction

The National Chapter Program provides a chapter management, mission alignment, and continuous growth framework for SHPE chapters to realize the SHPE Mission and Vision through their events and functions that lead to increased member participation and success. The NCP provides chapter leaders feedback from established SHPE leaders to make intermittent adjustments throughout the year as they enact their chapter plans. Through the program, chapters communicate with regional and National leadership and are recognized for their successes throughout the organization.

1.1 History

The NCP was created in 2020 and is the successor of the National Reporting Program (NRP). The NRP merged the National Point System and End of the Year Report in 2010. The program has undergone three major updates since 2010. Further details about the history of NRP can be found in the 2020 American Society of Engineering Education national conference proceedings paper, DOI:10.18260/1-2--33997

1.2 Purpose

Per their affiliation agreement and certification with the organization, SHPE chapters (student and professional) must participate in the NCP in which:

1. Chapters record chapter activity for alignment with the SHPE mission;
2. Chapters communicate their accomplishments, best practices and lessons learned with SHPE national, current, and future chapter leadership, and sponsors;
3. SHPE provides feedback at two points throughout the year to support chapters in accomplishing their goals aligned with the SHPE mission;
4. SHPE selects chapter award winners based on their chapter reports' scores.

2 SHPE chapter description

The SHPE chapter is an ecosystem as illustrated in figure 1. The ecosystem has a similar structure as that of a biological system: consists of components and an energy source and flow determines the interactions between the components. The energy source for SHPE chapters is the national SHPE entity, affiliated organization (university, city, corporation, etc.), and sponsors. The components of the SHPE chapter ecosystem encompass the fundamental activities of a chapter in aligned with the SHPE mission. These components are fundamental in the sense that in absence of one of them the chapter ecosystem is compromised and quickly seizes to function as a chapter. The components of the SHPE chapter ecosystem are: (i) mentorship and money, (ii) governance and communications, (iii) chapter member activities, and

Figure 1 Illustration of the SHPE chapter ecosystem.

(iv) succession and legacy. Heat (and ganas [Spanish for desire]) is spent to transition from one component to the next in order listed previously. The components interact as a cycle. The chapter ecosystem produces the members' success as an output and the attribute of its membership demographics.
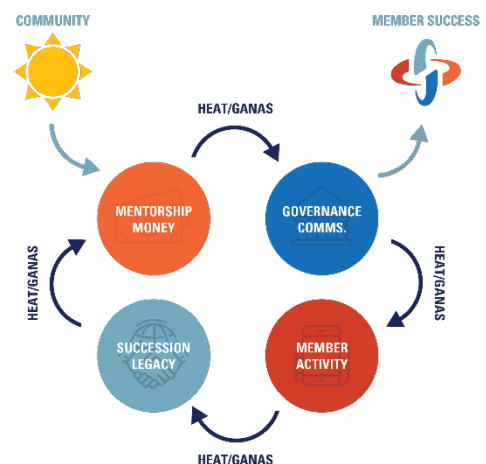
2.1 Chapter ecosystem components

We detail the key information of the chapter ecosystem components and output that are collected by the NCP.

1. **Mentorship and money**
   a. Advisor and Professional Interaction
   b. ERG support
2. **Governance and communication**
   a. Distribution of responsibilities and accountability, meetings
   b. Chapter annual schedule (CMT)
   c. Marketing, website, newsletters, logo, communications tools (e.g., Slack), social media
3. **Member-focused activities**
   a. Recruitment, Retention, Engagement
   b. Chapter Pillars (see Section 3.2)
   c. National Program Engagement – MentorSHPE, ScholarSHPE, SHPEtinas, NDC, and SHPE Junior chapter support
4. **Succession and legacy**
   a. Alumni mentoring programs, endowments, and DEI service
   b. Multi-year sustained chapter performance, systemic programming
5. **Member success and demographics**
   a. Post-graduation success, career upward mobility, and positive Hispanic community engagement
   b. Region, membership count, lifetime membership

3 Program description

The NCP sustains and monitors the chapters' ecosystem using the following components.

1. **Chapter Management Tool (CMT):** a comprehensive, streamlined chapter management and improvement tool consisting of a Chapter Plan is required by the chapters towards organizing their events and programs with continuous feedback from regional leaders and the chapter reports.
2. **Reporting**:
   a. **Quarterly check-ins -** Reports measuring the chapter's performance of its four ecosystem components and its demographics (see section 2 above) shall be required and submitted by the chapters.
   b. **Chapter reports -** If necessary, two reports documenting the chapter's events, programs, and ability to further SHPE's mission and vision shall be used to assess the chapters' growth and make award determinations.
3. **Chapter Sponsorship Brochure (CSB) (for student and applicable professional chapters):** a chapter sponsorship brochure template that is consistent with the CMT and chapter reports for chapters to use to secure funds to implement their chapter plan.

3.1 Chapter Management Tool (CMT)

Participation in the CMT is _**required**_ for all SHPE chapters as part of their certification with the organization. SHPE Chapters use the CMT to plan, coordinate, implement, and document their chapter activities that realize the SHPE mission and vision statement through the SHPE year. Activities correspond to a specific goal or objective and at least one event per category shall be included. The CMT consists of

1. Chapter executive board information and social media information,
2. SWOT analysis of the earlier academic year, and
3. Chapter Schedule for the current academic year.

The CMT is not graded for points. The CMT enables chapters to assess themselves through a SWOT Analysis; develop a Chapter Schedule to set goals and objectives, to track progress towards achieving those goals/objectives; and obtain feedback from regional and national leadership. Within their Chapter Plans, chapters have three goals: recruitment, retention, and success of the members. For student chapters, success is the post-graduation success goals of the student members. For professional chapters, success is the influence within the community and career upward-mobility of the members. Within each goal, SHPE chapter provides objectives that: 1. are aligned with a SHPE chapter pillar and 2. satisfy the SMART criteria. The SMART criteria for chapter objectives details are provided in the CMT template.

3.2 SHPE chapter pillars' definition

- **Academic Development (students)**: Activities geared towards the successful graduation of members through improving or keeping high academics and/or pursuing an advanced degree education in STEM.
- **Professional Development**: Activities geared at the soft skills and/or technical skill breadth development of the members' current workforce competencies.
- **Leadership Development**: Activities geared towards developing leadership skills of members, ensuring a solid foundation of leaders within the executive board and the successful transition of officers.
- **Chapter Development**: Activities promoting recruitment/retention of members, promote a solid foundation for the chapter itself in terms of funding, chapter's presence and/or influence in the local community, and a unified membership.
- **Outreach & Community Service:** Activities specifically promoting STEM awareness in the K-12 community and/or supporting the local community.
- **Student/Professional Chapter Interaction (professionals)**: Activities promoting professional and local student SHPE chapter interaction and mentorship by the SHPE professional chapter.
- **Career Development (professionals)**: Activities geared towards the career and management development with the specific intent of upward mobility and/or advancement within the members' career.

3.3 Chapter reporting

3.3.1 Quarterly chapter check-in overview

Participation in the chapter quarterly check-ins is *required* as part of their certification with the organization and for chapter award consideration. There are four quarterly check-ins submitted each SHPE quarter. Each of the quarterly check-ins shall ask questions regarding the four SHPE ecosystem components described in Section 2.1. Each quarterly check-in shall be an online form submission that takes less than 30 minutes to complete by one chapter leader. Chapters shall submit one submission per quarter. The chapter quarterly check-ins are not graded for points.

3.3.2 Chapter report overview

Student and professional chapters **must** complete and submit half-year reports for National Award consideration. The summary and description of the items required within each report and their respective value in points is shown in the chapter report template. Each report shall not exceed eight (8) pages. Only reports in PDF format upon submission will be accepted. Below is an overview of the requirements for each of the reports. The required content is to be provided in the order in the table below. The chapter report submission and evaluation are detailed in Sections 4 and 5, respectively.

Item	Points possible	Comments
Cover Page	0	One (1) page max with chapter contact Info
Chapter Highlights	0	One (1) page max; self-nomination for SHPE Chapter Awards. Maximum two awards.
Member Recruitment Activities	6	Two (2) page max; summarizing annual chapter's activity for recruiting members
Member Retention Activities	6	Two (2) pages max; summarizing annual chapter's activity for retaining members
Member Success Activities	6	One (2) page max; summarizing annual chapter's activity for members' success
Support Needed	0	One (1) page max; communicate issues and needs to SHPE national and regional leaders
Total	18	

4 Submission process

SHPE chapters create viewable/accessible links of their CMTs and chapter reports. Documents are typically stored on their chapter's storage drive/system. Chapters create and control their storage drive/system. Documents are to adhere to the guidelines in the templates for National Chapter Award consideration.

IMPORTANT: Chapters must enable "commenting with anyone with the link" capability prior to submitting the link. Instructions on how to enable this capability are in both the template and submission form. Chapters should **not** e-mail their NCP documents. Incorrect submissions are not considered for review, feedback, nor chapter awards.

4.1 Document dates

The information chapters provide shall apply to the following times of the SHPE year:
- **CMT:** Full SHPE year: July 1st of current year to June 30th of following year
- **Quarterly check-ins:** Q1 July 1-Sept 30; Q2 Oct 1-Dec 31; Q3 Jan 1-March 31; Q4 April 1-June 30
- **Report 1:** July 1st (start of SHPE year) to January 15th
- **Report 2:** January 16th to June 30th (end of SHPE year)

4.2 Submission deadlines and receipt

Chapters submit the NCP items by the dates below to be eligible for National Chapter Award. The documents are to be submitted before 11:59pm Pacific Time on their date due. Documents submitted after their respective deadline shall be provided feedback but will be

ineligible for chapter awards. Confirmation of receipt shall be posted in the evaluation and feedback document five days after the due date.

Item	Due date
Q1 check-in	October 15th
Q2 check-in	January 15th
Report 1	January 15th
Q3 check-in	April 15th
Q4 check-in	June 15th
Report 2	June 15th

4.4 Requesting deadline extensions

There are no deadline extensions for the check-ins. Chapters can request submission extensions for the chapter reports. Extension requests are to be provided **at least one week** before the intended deadline via email to chapters@shpe.org. It is the chapter's responsibility to confirm receipt and approval of extension from the SHPE membership department. The extension is for two (2) business days from the above deadlines.

4.5 Requesting a "prior-to-submission" review

New SHPE chapters and/or SHPE chapter submitting an NCP for the first time can request "prior-to-submission" review/feedback from the SHPE membership department at chapters@shpe.org. Eligible chapters for the "prior-to-submission" review must say so in their email to the SHPE membership department. Documents are to have edit/comment level capabilities. Eligible requests are to be made three weeks prior to NCP item deadline with two weeks' time for review. Chapters are encouraged to seek feedback and revisions from their regional leadership team.

5 Chapter evaluation

5.1 Overview

Chapter reports are reviewed and graded by national and regional leadership. The final score is the cumulative score from both half-year reports. Lessons learned and requests for support needed will be read by regional leadership or SHPE membership department. After the reports are evaluated, the chapters that fulfill the award requirements are considered for chapter awards. The point breakdown is as follows.

NCP item	Points possible
CMT	None
Quarterly check-ins	None
Report 1	18
Report 2	18
Total	36

5.3 Feedback

Chapters shall be eligible for feedback if and only if they submit a self-nomination for an award (see section 2.3.4). For the chapters reports, one of two types of feedback shall be provided to chapters: 1. brief (less than a sentence) or 2. detailed (paragraph length). The first shall be provided to chapters that earned a chapter award, the latter to those that did not. National and regional leaders provide feedback to chapters in a timely matter, below is the feedback schedule. After the evaluation date, no additional awards will be provided. However, the chapters shall have a two-week period to request a point score revision.

NCP item	Evaluation return date	Re-grade request deadline
Report 1	March 15th	March 30th
Report 2	July 15th	July 30th

5.4 Evaluation protocol

Chapters will be evaluated based on their ability to substantiate their ability to realize the SHPE mission. The evaluation protocol rubric for chapter reports are as follows.

- SHPE Staff and leaders shall evaluate each of the chapter reports
- Evaluators provide feedback to the chapter on the quality of the report by the dates stated in the NCP Guidelines
- The grading system is based on a single-integer value ranging from zero to two
- Evaluators will provide an integer value for a grade
- No decimal values are allowed, e.g., a score of 1.5 is **not** accepted
- The quality of the self-nominations is used for award determination
- The following is the two (2) point system in the rubric for each component:
    - o 0: No submission/limited effort
    - o 1: Below quality and/or insufficient information
    - o 2: Exemplary level of detail and best practice

5.5 Chapter report rubric

Each of the Chapter Recruitment, Retention and Success pages will be evaluated based on the CMT-planned activities, obtained (numerical) outcomes, and lesson learned. Report 1 and Report 2 will utilize the same Rubric shown below.

Item	Points Possible	Report Rubric		
		0 points	**1 point**	**2 points**
Cover Page	0	N/A	N/A	N/A
Chapter Highlights	0	Required to be eligible for awards	Required to be eligible for awards	Required to be eligible for awards
CMT-planned Activities	2 pt each (Recruitment, Retention, Success) = 6	No submission, minimal effort	Minimal detail and/or information provided of the chapter's plan and strategic plan; direct connection to utilization of the CMT	Detailed chapter's state and chapter plan, minimal highlights of achieved outcomes; direct connection to utilization of the CMT
CMT-obtained Outcomes	2 pt each (Recruitment, Retention, Success) = 6	No submission, minimal effort	Minimal detail and/or information provided on the metrics; associated context(s) to understand significance	Comprehensive numerical metrics with figures and evidence of context
Lessons Learned	2 pt each (Recruitment, Retention, Success) = 6	No submission, minimal effort	Some details of lessons learned to improve the chapter; followed the template	Clear evidence of the chapter understanding the value provided, implemented, and evaluated paradigm using their SWOT analysis to reflect on chapter's performance
Support Needed	0	Required to be eligible for awards	Required to be eligible for awards	Required to be eligible for awards
Total	18			

6 Chapter awards

Completed chapter reports and check-ins are required for award eligibility. Chapters must submit the chapter reports by deadlines for award consideration. Awards are presented at the SHPE National Convention.

Regional awards: Regional awards are awarded to chapters for their performance overall for the SHPE year. Awards are based on the CMT submission, chapter report evaluation, chapter's self-nominations, and the strength of the chapter's functions/activities/events in all the relevant categories. A minimum of 80% (29 of 36 total points) of the points are required for award eligibility.

National awards: National awards are awarded to chapters for their performance overall for the SHPE year. Awards are based on the CMT submission, chapter report evaluation, chapter's self-nomination, and the strength of the chapter's functions/activities/events in all the relevant categories. A minimum of 90% (33 of 36 total points) of the points are required for award eligibility.

Disqualification condition: If a chapter participates in misconduct at a local, regional, or national level (e.g., general meetings, regional events, SHPE Conference, etc.) the chapter is not eligible for awards and feedback.