Quarterly Check-Ins

National Chapter Program
Quarterly check-ins will allow SHPE to get a better understanding of your goals for the year and how you're progressing with that plan to identify areas/gaps where SHPE staff, regional leaders, and your peers can help.

* 1. Which quarter check-in are you submitting?
   - Q1 (Covers July, August, September)- Deadline 10/15
   - Q2 (Covers October, November, December)- Deadline 1/15 *Includes submission space for Report 1*
   - Q3 (Covers January, February, March)- Deadline 4/15
   - Q4 (Covers April, May, June)- Deadline 6/15 *Includes submission space for Report 2*
Quarterly Check-Ins

Q1 Chapter Information

Please provide the following information about your chapter:

* 2. Select your chapter name from the menu options below. Please reach out to chapters@shpe.org if your chapter is not listed.

Please enter contact information for one person from your chapter who will serve as the primary point of contact for the check-in.

* 3. First Name

* 4. Last Name(s)

* 5. Email Address

* 6. In which region is your chapter?
   
   ○ Region 1
   ○ Region 2
   ○ Region 3
   ○ Region 4
   ○ Region 5
   ○ Region 6
   ○ Region 7

Regional Map for SHPE Chapters

* 7. What type of chapter are you?
   
   ○ Community College
   ○ University
   ○ Professional
   ○ Corporate (Professional)
* 8. Do you have chapter advisor(s)?

- [ ] Yes, we have 2
- [ ] Yes, we have 1
- [ ] Yes, but we'd like to switch advisors
- [ ] Unsure
- [ ] No, we do not have a chapter advisor
**You will only complete this page if you indicated that you had one chapter advisor in Question 8**

<table>
<thead>
<tr>
<th>Quarterly Check-Ins</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1 Chapter Advisor Information</td>
</tr>
</tbody>
</table>

* 9. Please provide the name and contact email of your chapter advisor.

- Advisor Full Name
- Advisor Email

* 10. How active is your chapter advisor?

- [ ] Not at all active
- [ ] Somewhat active
- [ ] Very active
- [ ] Extremely active
**You will only complete this page if you indicated that you had two chapter advisors in Question 8**

### Quarterly Check-Ins

#### Q1 Chapter Advisors Information

* 11. Please provide the name and contact email of your chapter advisors.

<table>
<thead>
<tr>
<th>Advisor 1 Name</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Advisor 1 Email</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Advisor 2 Name</th>
<th></th>
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<tbody>
<tr>
<td>Advisor 2 Email</td>
<td></td>
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</tbody>
</table>

* 12. How active is the *first* chapter advisor you listed above?

- [ ] Not at all active
- [ ] Somewhat active
- [ ] Very active
- [ ] Extremely active

* 13. How active is the *second* chapter advisor you listed above?

- [ ] Not at all active
- [ ] Somewhat active
- [ ] Very active
- [ ] Extremely active
## Quarterly Check-Ins

### Q1 Chapter Operations Information

#### * 14. Governance and Structure

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>Partially</th>
<th>Barely</th>
<th>No</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did you update, or plan to update, your chapter bylaws this year?</td>
<td></td>
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<tr>
<td>Did you collect local chapter dues?</td>
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<tr>
<td>Are chapter elections scheduled before April 15?</td>
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</tbody>
</table>

#### * 15. Chapter Operations: Does your chapter have the following operations established?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>Partially</th>
<th>Barely</th>
<th>No</th>
<th>What is that?</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Chapter Plan (board meetings, events, partnerships, etc)</td>
<td></td>
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<td></td>
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<tr>
<td>All Officer Positions Filled</td>
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<tr>
<td>Chapter Management Tool</td>
<td></td>
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<tr>
<td>File Management System (Google drive, Dropbox, etc)</td>
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<td></td>
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<tr>
<td>Annual Budget</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Social Media Accounts (LinkedIn, Instagram, Facebook, TikTok, etc)</td>
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<tr>
<td>Chapter Calendar of Events Visible to Members</td>
<td></td>
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<tr>
<td>Fundraising Plan</td>
<td></td>
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<tr>
<td>Bank Account</td>
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<tr>
<td>Bill.com Account Set-up or Another Portal for SHPE to Send Payments</td>
<td></td>
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</tbody>
</table>
* 16. Rank in terms of budget importance to your chapter with the top being the most important.

- [ ] Chapter Travel/Registration to Convention
- [ ] Chapter Travel/Registration to RLDC (Regional, Spring events)
- [ ] Chapter Programming (development, speakers, etc)
- [ ] Community Service
- [ ] Events (socials, networking, pizza parties, etc)
- [ ] Scholarships
- [ ] Other

* 17. Select **all** of the programs, offerings, or services offered by your chapter during **Q1 (July-Sept)**?

- [ ] Academic Support
- [ ] Scholarship(s)
- [ ] MentorSHPE
- [ ] Technical Projects
- [ ] Noche de Ciencias/Día de Ciencias
- [ ] Local Outreach Efforts
- [ ] SHPEtinas
- [ ] Leadership Development
- [ ] Networking/Social Events
- [ ] Professional/Career Development
- [ ] Support a SHPE Jr Chapter
- [ ] Other (please specify)

- [ ] None of the above
* 18. To the best of your knowledge, provide whole number estimates of the following activities for Q1 (June 1-Sept 30):

<table>
<thead>
<tr>
<th>Activity</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Events/Programs</td>
<td></td>
</tr>
<tr>
<td>Number of Hours Supporting SHPE's Mission (aka the number of hours for the programs, services, offerings you selected in the question above)</td>
<td></td>
</tr>
<tr>
<td>Number of K-12 Schools Impacted via Outreach</td>
<td></td>
</tr>
<tr>
<td>Number of Community Outreach Hours</td>
<td></td>
</tr>
<tr>
<td>Number of MentorSHPE Connections within your Chapter</td>
<td></td>
</tr>
<tr>
<td>Scholarship Dollars Raised</td>
<td></td>
</tr>
<tr>
<td>Scholarship Dollars Awarded</td>
<td></td>
</tr>
</tbody>
</table>

* 19. Select all of the programs, offerings, or services you plan to offer in the future?

- [ ] Academic Support
- [ ] Scholarship(s)
- [ ] MentorSHPE
- [ ] Technical Projects
- [ ] Noche de Ciencias/Dia de Ciencias
- [ ] Local Outreach Efforts
- [ ] SHPETinas
- [ ] Leadership Development
- [ ] Networking/Social Events
- [ ] Professional/Career Development
- [ ] Support a SHPE Jr Chapter
- [ ] Other (please specify)
* 20. Are you using your official SHPE chapter logo?  
Logos can be found here under SHPE Branding:

**SHPE Chapter & Region Specific Logos**

- Yes
- No
- I don't know

* 21. Marketing/Communications

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>Partially</th>
<th>Barely</th>
<th>No</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you have a chapter website?</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Do you have a chapter newsletter?</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Do you have communications portal with members? (slack, discord, whatsapp, etc)</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Do you have chapter social media account(s)? (LinkedIn, Instagram, Facebook, TikTok, etc)</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
</tbody>
</table>

* 22. How often do you communicate with your members across all your communication methods (email, messaging, social media, etc)?

- Daily
- Weekly
- Monthly
- Seasonal
- Yearly
- Never

* 23. How do you receive member feedback? (Select all that apply)

- Surveys
- Verbal Feedback
- Group Chat
- We do not receive feedback
- Other (please specify)
24. How often do you get feedback from your members?
- Daily
- Weekly
- Monthly
- Quarterly
- Other (please specify)

25. What area(s) would your chapter like additional help? (Select all that apply)
- Member Recruitment
- Member Engagement
- Member Retention
- Communicating with Members
- Finding an Active Chapter Advisor
- Updating Chapter Bylaws
- Annual Chapter Plan (Board meetings, events, partnerships, etc)
- Chapter Management Tool
- Creating a Budget
- Fundraising
- Succession Planning
- Elections (Planning or Execution)
- E-board Meetings (Planning or Execution)
- Community Outreach (Planning or Execution)
- Creating survey tools for member feedback
- Other (please specify)

26. SHPE teaches SHPE is a powerful way to share best practices to empower and elevate chapters across SHPE nation! Is there anything your chapter is doing well with which you’d like to help other chapters? (Select all that apply)
- Member Recruitment
- Member Engagement
- Member Retention
- Communicating with Members
- Finding an Active Chapter Advisor
- Updating Chapter Bylaws
- Annual Chapter Plan (Board meetings, events, partnerships, etc)
- Chapter Management Tool
- Creating a Budget
- Fundraising
- Succession Planning
- Elections (Planning and/or Execution)
- E-board Meetings (Planning and/or Execution)
- Community Outreach Events (Planning and/or Execution)
- Creating survey tools for member feedback
- Other (please specify)
* 27. Please provide a link to your chapter management tool (CMT). **Verify that the link is shareable and provides viewing access.** The template can be found [here](#) under Chapter Reporting: Chapter Management Tool.