



Chapter Annual Planning Template

The template below should be completed annually by the Chapter Executive Committee or leadership team including key dates and requirements, key chapter representation opportunities and chapter programming in the areas of communications, leadership & training and community support. Upload completed reports to <http://www.asse.org/committees/strategic-reports.asp> by August 15.

This tool is intended as a high-level guide for your chapter’s programming discussion. You may add detail to meet your needs. Additional tools and resources are available at http://members.asse.org/2007/officer_central/officer_STARS.asp. Questions or suggestions? Contact Steve Hansen, Chapter Services Manager at 847-768-3403, shansen@asse.org for immediate assistance and start a dialogue with [fellow officers on linked in](#).

Key Dates and Required Reports - Review and assign ownership. The current version of the Chapter Key Dates & Requirements document is available on the STARS resource page - http://members.asse.org/2007/officer_central/officer_STARS.asp

CHAPTER NAME: Hawaii Chapter – This is a two year strategic plan (**all budget items are for a two year period**).

Chapter Representation

Action Item	Due Date	Owner	Budget Requirements
Represent chapter at annual House of Delegates Meeting and Regional Caucus	April 1, 2015	Delegate and Past President - Jim Newberry Second position is currently open.	\$5000(2 years)
Attend ROC and/or AOC meetings	September 2014 and ongoing	President - Joaquin Diaz	\$3000 (2 years)
Attend Leadership Conference	Deferring for one year, plan for 2015	President - Joaquin Diaz	\$1200 (2015)

Communications

Action Item	Due Date	Owner	Budget Requirements
Newsletters	Quarterly – starting in August 2014	Communications Chair and newsletter editor	\$0
Public Relations – plan is to meet	August 2014 and ongoing	President - Joaquin Diaz	\$10,000 (2 years) offset by



with elected government members to explain ASSE and what we do. Attend social events and other conferences to reach out to different organizations and ASSE chapters.			sponsorships from organizations. Plan is to offset costs to equal \$0 exposure for the chapter.
Email – ASSE hosting agreement	Completed	President - Joaquin Diaz and Communications Chair	\$675 (2 years)
Website	“	“	“
Social Media	“	“	“
Employment Opportunities	September 2014	Membership Chair – Mari Aldover	Require employers to pay a fee (\$50) for posting on ASSE chapter site. Require consultants to provide an in-kind service or pay a fee of \$1000 to chapter. Safety professionals post resumes at no costs if they are members of ASSE.

Leadership & Training

Action Item	Due Date	Owner	Budget Requirements
Strategic Planning	August 2014 for two year look ahead	Executive Committee (EC)	\$0 (volunteer)
Succession Planning	December 1, 2014	EC	\$0 (volunteer)
Utilizing research to better understand member needs – we intend to use ASSE hosting site (mail chimp) to conduct a survey of member needs. Enhance partnerships with non-profit organizations to understand how to better serve our membership	December 1, 2014	Membership Chair – Mari Aldover	Covered in our hosting agreement and in public relations budget.



(training of the EC).			
Officer training – Training on managing non profits will be a priority. Coordinate training with another non profit organization.	October 1, 2014	President – Joaquin Diaz	TBD – will require approval by EC.
Financial management – Developing SOGs by treasurer for bookkeeping, controller, governance, and maintaining records for compliance with laws/fiduciary best practices. Use of Quick Books and retainer for bookkeeper is covered in the budget requirements of \$15,000 over two years.	December 1, 2014	Treasurer – Tracy Lawson	\$15,000 (2 years)
Sourcing event speakers – Schedule of training activities will be planned on three month intervals and speakers will be lined up accordingly. Costs incurred will be offset by seeking sponsorships from partner organizations.	Ongoing	President – Joaquin Diaz	\$10,000 (2 years) in-kind services.
Chapter meeting logistics – Budget item above includes costs for speakers and facilities offset by sponsorships from partner organizations.	Ongoing	“	“ (included above)
Chapter virtual meetings – Chapters meetings will use Webex donated as an in-kind service by Lawson and Associations.	Ongoing	“	\$2,000 (2 years) in-kind services.



<p>Cross-Society collaboration – We intend to sponsor members to attend other regional PDC conferences with a goal of developing contacts for enhancing collaboration. We will invite other chapter members to attend our events. Attend each ROC, HOD, and Society PDC events to enhance contact network for partnering. Use Professional Safety to update on local PDC events.</p>	<p>Ongoing</p>	<p>President – Joaquin Diaz and EC members as designated.</p>	<p>Covered by sponsorships by organizations or grants.</p>
<p>Event CEUs – Coordinate events like PacRim, Pre/Post conference events and workshops for accreditation (CEUs). Look at sponsoring Society webinars for our membership at a central location.</p>	<p>Ongoing</p>	<p>Past President – Jim Newberry</p>	<p>\$2,000 (2 years)</p>
<p>Sponsorship – Work with employers, vendors, partner organizations, consultants, etc. to sponsor chapter events and activities. Consider community outreach events .</p>	<p>Ongoing</p>	<p>President – Elect</p>	<p>\$15,000 (2 years) does not include major conferences (OSHA Hawaii One Day Workshop and PacRim).</p>
<p>Member recognition – Recognize member contributions at OSHA Hawaii Workshop and PacRim. Provide sponsorship of events to members most active within the chapter.</p>	<p>Ongoing</p>	<p>Membership Chair – Mari Aldover</p>	<p>\$1,000 (2 years)</p>



Member recruiting – EC members will divvy up contact lists from BCSP, AGC Hawaii Chapter, and other organizations for personal contact by arranging a meeting for a “face to face” or by phone to ask for commitment. Participating in events like career days and others will help to increase membership.	December 1, 2014	Membership Chair – Mari Aldover	“(included above)”
Section management – Appoint section chairs as members of the EC. President or designated person attends section meetings.	July 1, 2014	Joaquin Diaz	\$0
Student section management – Appoint student section chair as member of the EC. President or designated person attends section meetings.	July 1, 2014	Joaquin Diaz	\$0

Community Support

Action Item	Due Date	Owner	Budget Requirements
Student activities exposing them to the safety profession – See above member recruiting section on career day activities.		Member at large – Tristan Aldeguer	\$5,000 (2 years)
NAOSH Week participation – develop a technology for safety concept for high school students.	December 31, 2015	Member at large – Tristan Aldeguer	\$1,000 - PacRim Budget (2016)
Scholarship or ASSE Foundation support – We need to evaluate	November 1, 2014	President – Joaquin Diaz	TBD – EC will vote as needed.



the obligations for releasing scholarship money for members within this program.			
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