



# Blueprint for Chapter Success

## Self-Evaluation and Goal-Setting for CMAA Chapters



**CLUB  
MANAGEMENT  
ASSOCIATION  
OF AMERICA**

## Phase 1. Chapter Profile and Audit — Self-Evaluation

The *Blueprint for Chapter Success* is a document designed to lead CMAA chapter officers through a process of self-evaluation and goal-setting. The 11 chapter program areas listed within these pages cover activities deemed central to the successful performance of your chapter. Each activity should be viewed within the context of your chapter's demographics, i.e., size, geographic distribution of membership, economics, available resources, etc.

When completing the *Blueprint's* Chapter Profile and Audit — Self-Evaluation, please complete both Column A and Column B.

### Column A (Importance to Chapter)

As chapter officers, you are the most qualified to assign a numerical value representing the relative importance of that activity to your chapter to each activity listed. Rate each activity on a scale of 4 (very important/very relevant to chapter success) to 0 (not important/irrelevant to chapter success).

Please note: Several activities have been pre-scored. These activities are required by CMAA Bylaws and have been rated “4” to signify their importance to successful chapter operations. Other activities are designated by the symbol - ; these activities, though not mandated by CMAA Bylaws, are judged to be critical to chapter success.

### Column B (Performance Rating)

This column assesses the success of your chapter's performance in each of the listed activities.

1. Rate each activity on a scale of 4 (our chapter did an exceptional job on this activity) to 0 (poor job/we did not participate in this activity).
2. Once you have finished rating the activities in each segment, write the total in the box located beneath each segment. Divide the total for Column B by the total for Column A. The result will yield a value expressed as a percentage and will represent how well your chapter is doing in each particular area.

### Your Overall *Blueprint* Score

Based on the hard work you have put into assessing your chapter's strengths and weaknesses, you should have an accurate idea of how well your chapter is doing. You have already scored your chapter's performance on the activities in each segment. You are now ready to give your chapter an overall score.

1. You have previously calculated a subtotal for Column B (Performance Rating) in each segment. Add these 11 subtotals and designate the total “x.” Do the same for Column A (Importance to Chapter) and designate the total “y.” Divide “x” by “y” to arrive at your overall *Blueprint* score.
2. For each activity pre-scored with a “4” that has a matching “4” in Column B, award your chapter an additional 1.5 percentage points.

**If You Scored:**

- 100%–80%** Your *Blueprint* is in great shape — keep up the good work!
- 79%–59%** Your *Blueprint* is in good shape, but could use a tune-up.
- 58%–38%** Your *Blueprint* is satisfactory. Please contact the National Headquarters for some ideas on how to improve.
- 37% and lower** Your *Blueprint* needs help. Please contact the National Headquarters for assistance.

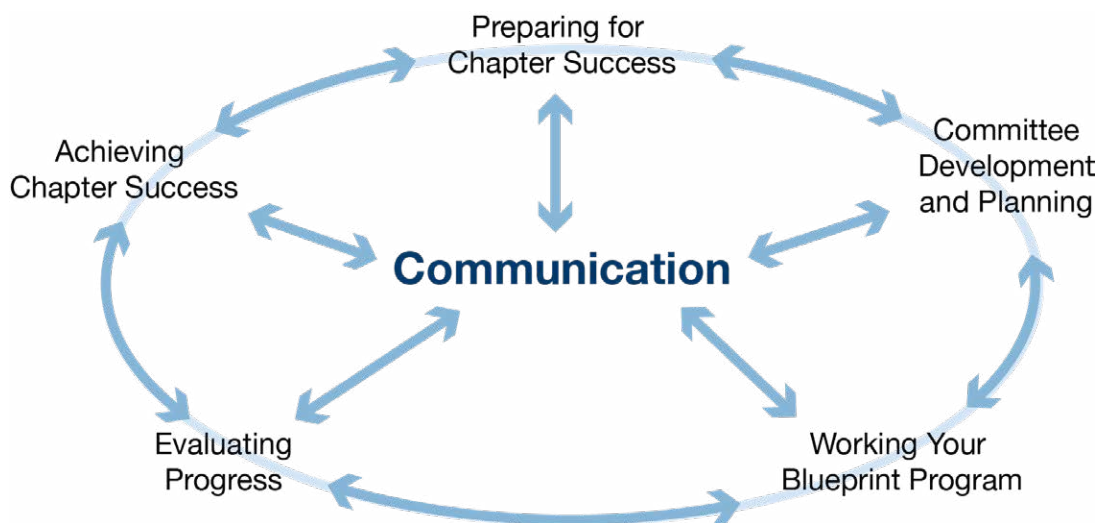
Once you have completed the *Blueprint for Chapter Success*, you might wonder whether there are matters that require your special attention. We would like to suggest that particular attention be paid to activities that were scored high on “Importance to Chapter” (Column A) but low on “Performance Rating” (Column B). Once the areas that need improvement are identified, the members of your chapter should work together to determine the appropriate steps to take toward improvement. Please reference this handbook or CMAA staff for suggestions.

## Implementing Your Blueprint Program

The next few pages are designed to assist you in implementing your *Blueprint for Chapter Success*. The process for achieving this success consists of six phases. Each phase lists objectives and action steps necessary for meeting those objectives. The action steps involve three levels of implementation:

- The chapter president working with the chapter;
- The chapter officers/chairmen working with their respective committees; and
- The participation of individual chapter members.

As you complete each phase, you will find that your chapter has moved one step closer to completing its *Blueprint for Chapter Success*.



## Communication

Communication is the foundation for the *Blueprint* program. Supportive and effective communication among officers, committee chairmen and members will help your chapter start on the road to success.

### Elements of Supportive and Effective Communication

Each officer/committee member should:

- Share information;
- Practice active listening;
- Provide necessary feedback;
- Facilitate broad participation;
- Make “I” statements, not “you” statements;and
- Focus on the issues, not the person.

## Phase 2. Using the Blueprint for Chapter Success

- Evaluate your chapter’s performance to obtain an overall picture of strengths and areas for improvement;
- Develop chapter goals; and
- Develop objectives that support your chapter’s goals.

### **Action Steps for the Chapter President:**

- Step 1** Have officers complete the Blueprint for Chapter Success; assess the group’s feelings regarding the chapter’s strengths and improvement areas.
- Step 2** Create an open environment by a) using officers’ and members’ knowledge, skills and ideas to develop suggestions; b) checking the Chapter Officer Resource Page and other resources for helpful tools; and c) checking with National Headquarters/other chapters and allied associations to see what they do.
- Step 3** Analyze the organizational structure of the chapter and its culture.
- Step 4** Develop goals for the chapter.
- Step 5** Develop measurable, specific objectives for each goal.
- Step 6** Identify the tools, skills and climate needed to accomplish the objectives.

## Phase 3. Committee Development and Planning

- Communicate the goals and objectives for the chapter to each committee;
- Work with each committee to develop an action plan for the year that will assist the chapter in meeting its objectives;
- Make sure the action plan contains attainable, measurable objectives; and
- Make sure the action plan contains specifics such as who is responsible, what is going to be done and when each objective is to be completed.

### **Action Steps for the Chapter President:**

- Step 1** Develop committees with people who have complementary skills (i.e., thinkers, doers, supporters).
- Step 2** Review the committee's action plan with the committee.
- Step 3** Make sure that goals and objectives are understood by officers and committee chairmen.

### **Action Steps for the Officers/Chairmen:**

- Step 1** Communicate the review of the *Blueprint* and the subsequent goals and objectives established by the board.
- Step 2** Review skills, knowledge and tools available to the committee.
- Step 3** Facilitate development of an action plan, setting up supporting objectives for the committee.
- Step 4** Assign roles/responsibilities to individual committee members.

## Phase 4. Working Your Blueprint Program

- Ensure roles and responsibilities of committees and officers have been defined and assigned; and
- Define “how” the chapter will implement the action plan with the committee and its various subcommittees.

### **Action Steps for the Chapter President:**

- Step 1** Keep communication and information open.
- Step 2** Ensure “new” people are supported by established members.
- Step 3** Monitor the group’s activities against the timeline.
- Step 4** Support officers’ and chairmen’s efforts.

### **Action Steps for the Officers/Chairmen:**

- Step 1** Work with the committee members to develop the when and how of their action plan.
- Step 2** Support subcommittee chairmen through open communication, providing tools and other information they need.
- Step 3** Design programs/initiatives to show committee results and/or progress.

## Phase 5. Evaluating Process

- Evaluate what has been accomplished—what we did well, what was successful and what we should change;
- Based on the evaluation, determine whether the chapter’s goals and objectives are still viable; and
- Develop a plan to implement changes.

### **Action Steps for the Chapter President:**

- Step 1** Regularly monitor the committees’ activities with the chairmen.
- Step 2** Regularly review the chapter’s activities with the officers and board.
- Step 3** Redefine chapter goals and objectives as the board deems necessary.

### **Action Steps for the Officers/Chairmen:**

- Step 1** Report the activities and progress of the committees to the board.
- Step 2** Review and evaluate activities with the committees.
- Step 3** Redefine committees’ objectives and action plans as needed.

## Phase 6. Achieving Chapter Success

- Is the chapter meeting its goals and objectives?
- Is the chapter where you planned for it to be on your time line?
- What successes have you realized?

### **Action Steps for the Chapter President:**

- Step 1** Review goals and objectives with the board of directors and committee chairmen to see if goals and objectives were met.
- Step 2** Determine what needs to be eliminated or modified from the program.
- Step 3** Use achievements as a basis when developing next year's plan.
- Step 4** Recognize all members for their contributions to the committee and the chapter.
- Step 5** Offer support to incoming leadership.

## Closing the Circle

- Keep in touch;
- Communicate openly and informally with chapter and committee members; and
- Maintain channels through which chapter and committee members can get information on a consistent and regular basis.

# Blueprint for Chapter Success

## Chapter Profile and Audit — Self-Evaluation

A

Importance to Chapter Performance	Rating	
<b>B</b>		<b>1. Board of Directors' Leadership</b>
4	4	Ensure the chapter is in compliance with Association, federal, state and local policies and regulations (e.g., membership guidelines, automatic acceptance of transfers, IRS).
2	4	Conduct a Board of Directors retreat once a year.
4	0	Enforce the dual-membership bylaw for Professional, Alumnus, and Faculty members.
2	4	Outline the authority and responsibility of the Board of Director's and Executive Committee as stated in the chapter's bylaws.
4	3	Submit an entry in the Chapter of the Year Award Program.
4	2	Establish a leadership development program for new members.
4	4	Attend the Leadership/Legislative Conference.
24	21	<b>Subtotals</b>
	88	
B ÷ A =		%



**A**  
Importance  
to Chapter

**B**  
Performance  
Rating

## 2. Chapter/National Identity

4	4	Promote awareness of your chapter's identity with the National Association.
3	3	Comply with CMAA Bylaws.
1	3	Have representation at the World Conference, regional meetings and Leadership/Legislative Conference.
4	1	Make appropriate visiting arrangements for National Directors.
4	2	Ensure prompt reporting of education credits, chapter officer, and other requested forms.
3	3	Involve the chapter in national award competitions (e.g., Idea Fair, Chapter Idea Fair, and Chapter of the Year).
1	4	Involve the chapter with National committees and/or the Board of Directors.
20	20	<b>Subtotals</b>
<b>B ÷ A =</b>	<b>100</b>	<b>%</b>



# Blueprint for Chapter Success

## Chapter Profile and Audit — Self-Evaluation

**A**  
Importance  
to Chapter  
**B**

Performance  
Rating

### **1. Board of Directors' Leadership**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Ensure the chapter is in compliance with Association, federal, state, and local policies and regulations (e.g., membership guidelines, automatic acceptance of transfers, IRS). |
| <input type="checkbox"/> | <input type="checkbox"/> | Conduct a Board of Directors retreat once a year.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Enforce the dual-membership bylaw for Professional, Alumnus, and Faculty members.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Outline the authority and responsibility of the Board of Director's and Executive Committee as stated in the chapter's bylaws.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Submit and entry in the Chapter of the Year Award Program.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Establish a leadership development program for new members.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Attend the Leadership/Legislative Conference.   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Subtotals</b>  |

**B ÷ A =** \_\_\_\_\_ %

**A**  
Importance  
to Chapter

**B**  
Performance  
Rating

## 2. Chapter/National Identity

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Promote awareness of your chapter's identity with the National Association.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Comply with CMAA Bylaws.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Have representation at the World Conference, regional meetings and Leadership/<br>Legislative Conference.            |
| <input type="checkbox"/> | <input type="checkbox"/> | Make appropriate visiting arrangements for National Directors.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Ensure prompt reporting of education credits, chapter officer,<br>and other requested forms.                         |
| <input type="checkbox"/> | <input type="checkbox"/> | Involve the chapter in national award competitions (e.g., Idea Fair, Chapter Idea<br>Fair, and Chapter of the Year). |
| <input type="checkbox"/> | <input type="checkbox"/> | Involve the chapter with National committees and/or the Board of Directors.  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Subtotals</b>   |

**B ÷ A =** \_\_\_\_\_ %

**A**  
Importance  
to Chapter  
**B**

Performance  
Rating

### 3. Chapter Management

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Set and/or revise chapter goals each year.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Prepare and distribute a chapter master plan at the beginning of the year.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Have officers and chairmen prepare written work plans.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Establish chapter committees and define their duties.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Provide timely follow-up and evaluation of each officer's work plan.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Establish and distribute an agenda prior to each chapter meeting.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Present officer/chairmen reports at chapter meetings.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Develop and maintain chapter communication tools (i.e., website, newsletter, social media, etc.).   |
| <input type="checkbox"/> | <input type="checkbox"/> | Encourage and develop the skills of interested members who are prospective future leaders.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Prepare a plan for the transition of chapter leadership (i.e., files, correspondence, records, etc.) to the proper successor at the end of the term.                        |
| <input type="checkbox"/> | <input type="checkbox"/> | Review the chapter's bylaws annually.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Use proper procedures for chapter elections (i.e., verify eligibility to hold office).  |
| <input type="checkbox"/> | <input type="checkbox"/> | Disseminate information received from Chapter Digest to members on a timely basis.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Have a central storage location for all chapter records and forms.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Record and ensure safe keeping of all historical, legal, and financial documents.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Encourage chapter member participation in the Wine Society, CMAA University, CMAA's research initiatives, the Club Resource Center, The Club Foundation, Club Careers, etc. |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Subtotals</b>  |

**B ÷ A = \_\_\_\_\_ %**

**A**  
Importance  
to Chapter

**B**  
Performance  
Rating

#### **4. Financial Management**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Prepare and adopt an annual chapter budget.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Maintain a book keeping system and provide regular financial reports to the chapter.           |
| <input type="checkbox"/> | <input type="checkbox"/> | Have a CPA conduct an annual audit and report to the chapter.                                  |
| <input type="checkbox"/> | <input type="checkbox"/> | Comply with requirements and submit all appropriate reports to Internal Revenue Service (IRS). |
| <input type="checkbox"/> | <input type="checkbox"/> | Maintain a good credit record by prompt payment of accounts payable.                           |
| <input type="checkbox"/> | <input type="checkbox"/> | Distribute chapter membership renewal notices at least 30 days in advance of the due date.     |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Subtotals</b>   |

**B ÷ A =** \_\_\_\_\_ %

**A**  
Importance  
to Chapter

**B**  
Performance  
Rating

### **5. Membership Recruitment/Retention**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Meet or exceed the chapter's annual membership recruitment goal.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Maintain or achieve at least a 90 percent retention rate for Professional members.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Ensure that individual member recruitment is supported by a planned, year-round chapter recruitment and retention program. |
| <input type="checkbox"/> | <input type="checkbox"/> | Include Retired members in chapter recruitment/retention programs.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Provide prompt, courteous response and follow-up to all prospective CMAA member inquiries.                                 |
| <input type="checkbox"/> | <input type="checkbox"/> | Apply a systematic process, identical from case to case, when evaluating candidates for membership.                        |
| <input type="checkbox"/> | <input type="checkbox"/> | Hold an annual activity/reception to recognize outstanding members and new members.  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Subtotals</b>   |

**B ÷ A =** \_\_\_\_\_ %

**A**  
Importance  
to Chapter  
**B**

Performance  
Rating

## 6. Advocacy

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Have an Advocacy/Legislative Chairman appointed for each state within a chapter's boundaries.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Provide regular updates to chapter members on legislative and regulatory changes pertaining to the club industry.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Send at least one representative to the Leadership/Legislative Conference.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Maintain contact with local, state, and federal elected officials.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Network with allied associations as a resource for information on legislative issues.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Schedule at least one chapter legislative or governmental affairs education program each year.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Review the legislative and regulatory information in <i>Chapter Digest</i> , <i>Club Management</i> magazine, and the <i>Legislative Report</i> blog at each chapter meeting. |
| <input type="checkbox"/> | <input type="checkbox"/> | Forward pertinent legislative and regulatory articles/information to National Headquarters on a timely basis.   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Subtotals</b>  |

**B ÷ A =** \_\_\_\_\_ %



**A**  
Importance  
to Chapter  
**B**

Performance  
Rating

### 7. Education and Certification

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Conduct a minimum of four education programs each year.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Have at least 20 percent of the chapter's Professional members earn and maintain the Certified Club Manager (CCM) designation. |
| <input type="checkbox"/> | <input type="checkbox"/> | Provide variety and depth in educational programs that address the 11 competency areas covered by the CCM exam.                |
| <input type="checkbox"/> | <input type="checkbox"/> | Provide additional education opportunities to members seeking certification.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Sponsor one regional education meeting each year (i.e., chapter workshop, CMI-endorsed program) solely or cooperatively.       |
| <input type="checkbox"/> | <input type="checkbox"/> | Have average meeting attendance above 50 percent.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Organize one annual educational activity with an allied association.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Review the chapter's professional development achievements annually.   |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Subtotals</b>   |

**B ÷ A =** \_\_\_\_\_ %

**A**  
Importance  
to Chapter

**B**  
Performance  
Rating

### **8. Career Services/Career Development**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Educate the chapter on Career Services programs and services.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Help managers in transition receive services from CMAA.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Educate clubs and their managers on how to locate management (including interim) and mid-management personnel through CMAA.            |
| <input type="checkbox"/> | <input type="checkbox"/> | Relay information to clubs regarding the options available through the CMAA Career Services Department.                                |
| <input type="checkbox"/> | <input type="checkbox"/> | Explain Club Careers and all career-related publications/information and their purposes to all club managers and clubs in your region. |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Subtotals</b>   |

**B ÷ A =** \_\_\_\_\_ %

**A**  
Importance  
to Chapter

**B**  
Performance  
Rating

### 9. Public Relations/Community Involvement

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Promote positive communication and chapter involvement with leaders of the community/region through ongoing correspondence. |
| <input type="checkbox"/> | <input type="checkbox"/> | Publicize and promote projects and events utilizing local/regional media and/or a chapter newsletter.                       |
| <input type="checkbox"/> | <input type="checkbox"/> | Conduct one major community service project, complemented by a smaller project, each year.                                  |
| <input type="checkbox"/> | <input type="checkbox"/> | Have representation on workshop panels with allied associations, business groups, etc.                                      |
| <input type="checkbox"/> | <input type="checkbox"/> | Develop a "speakers bureau" where colleges/universities can contact members to speak about the club management profession.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Publish/send a chapter newsletter or e-Newsletter four to six times per year.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Conduct an annual social event inviting allied association representatives, club officers, purveyors, etc.                  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Subtotals</b>  |

**B ÷ A =** \_\_\_\_\_ %

**A**  
Importance  
to Chapter

**B**  
Performance  
Rating

### 10. Student Activities

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Adopt or sponsor a student chapter if a local or regional four-year college or university has a hospitality-related curriculum.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Encourage the employment of student members by participating in CMAA's internship listing and the Career Opportunities and Mentoring Showcase at the World Conference. |
| <input type="checkbox"/> | <input type="checkbox"/> | Represent the club industry at local high school or university career days.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Establish and maintain a local scholarship program.  |
| <input type="checkbox"/> | <input type="checkbox"/> | Make donations, other than financial, to a college or university (auctions, promotions, equipment, etc.).  |
| <input type="checkbox"/> | <input type="checkbox"/> | Encourage student members to attend senior chapter meetings when applicable.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Encourage student chapters to enter the Student Chapter of the Year and the Shark Tank competition programs.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Encourage students to apply for scholarships through The Club Foundation.  |
| <input type="checkbox"/> | <input type="checkbox"/> | <b>Subtotals</b>   |

**B ÷ A =** \_\_\_\_\_ %