Letter to Chapter Leader explaining why and process
WHAT IS CAAR?
IAWP Chapter Affiliation Annual Report (CAAR) is a set of performance guidelines designed to help chapters deliver consistent benefits to members. CAAR consists of elements in five key areas that are necessary for running a chapter like a business: administration, financial, membership, professional development, and communication.

HOW DOES CAAR BENEFIT YOUR CHAPTER?
CAAR provides a clear set of standards enabling chapters to run like a business. CAAR is designed to help chapters promote and support the industry, align with the Association, and deliver a consistent set of benefits to members. While CAAR submissions are mandatory per the chapter affiliation agreement, the submission takes minimal time to complete, doesn’t cost chapters anything, and helps chapters become the best they can be.

CAAR SURVEY SUBMISSION
There are two sections to the CAAR survey: annual update and CAAR evaluation. You will submit your Chapter’s CAAR survey online using a link that will be sent to your Chapter President in early November. The online system will ask you all of the questions in this workbook as well as provide a tool to upload all required documents (see below). We will not accept any paper submissions.

Your Chapter’s survey must be complete by January 31, 2018. As an added incentive to get the survey done early, chapters that submit their completed CAAR summary and ALL documentation (in the appropriate format) by January 13, 2018, will be entered to win a FREE 2018 Workforce Development Conference registration! The winning chapter will be notified following January 31, 2018.

REQUIRED DOCUMENTS
To be considered complete, your CAAR submission must include the following documents:
1. 2017-18 Chapter board roster (in Excel format using the template)
2. Current Membership roster (in Excel format using the template)
3. 2017-18 chapter operating plan
4. Bylaws and other guiding documents
5. Most recent balance sheet and income statement
6. Examples of communications (i.e. newsletters)

ASSISTANCE COMPLETING THE CAAR SURVEY
This workbook is designed to assist you in completing the CAAR survey. Taking the time to complete this workbook will save you time when it is time to submit your survey as it will ask you all of the same questions. If you have questions or need assistance, please contact Steve Bent, IAWP Executive Director, or Suzanne Nichols, Chapter Development Chair.

CAAR SUPERSTAR CHAPTER
Chapters that score 100% on their CAAR submission will become a CAAR Superstar Chapter. Superstar chapters will receive a CAAR Superstar logo for the chapter website, a letter from Steve Bent, IAWP Executive Director, and recognition in IAWP publications as well as the annual Workforce Development Conference.

To be eligible for CAAR Superstar Chapter status, your chapter must complete all of the CAAR elements and submit all required documentation.
PART ONE: Annual Update

Part 1 of the Chapter submission is the Annual Update. This section provides information about your chapter such as membership volume, financial performance, and progress towards goals.

You will be asked to provide information and/or answer the following questions when completing Part 1 of the online survey.

Does your chapter pay for any administration help, such as a management firm, or other administrative service?  □ Yes  □ No

Please provide the contact information for your chapter’s administrative help below.

  Contact Name:
  Contact Company:
  City: State: Zip:
  Phone Number: Email:

Please provide your chapter’s 2017 mailing address: (Please note, for chapters that use a P.O. Box, please be sure you also provide a physical mailing address for your chapter.)

  Chapter Name:
  Mailing Address:
  Suite:
  City: State: Zip:
  PO Box:
  City: State: Zip:

As part of IAWP’s support chapter membership, our Administrative Office tries to connect chapter leaders to prospective members. Who within your chapter should we connect with prospective members?

  Contact Name:
  Contact Email:

Does your chapter budget to send board members to the IAWP Workforce Development Conference?  □ Yes  □ No

  If yes, how many chapter leaders are budgeted to attend in 2018? __________

When are your chapter board meetings typically held?
  □ Monthly  □ Bi-monthly  □ Quarterly  □ Other __________
What was your chapter’s 2017 gross revenue from all sources (dues, programs, sponsorships, etc.)? $__________

What is your chapter’s Employer Identification Number (EIN)? ________________

Is your chapter incorporated?  □ Yes  □ No

Is your chapter recognized by the IRS as a 501(c)6 organization? □ Yes  □ No

If no, how does the IRS recognize your chapter? ________________________________

Did your chapter file Form 990 □ or Form 990N □ with the IRS this year?

If no, why not, and when was the last time your chapter filed the appropriate tax returns with the IRS? ____________________________________________________

______________________________________________________________

Does your chapter have a current tax exemption status with the IRS? □ Yes  □ No

If no, is your chapter currently working with the IRS to be recognized as a tax exempt organization? □ Yes  □ No

If no, why not? ______________________________________________________

______________________________________________________________

Did your membership numbers increase, decrease, or stay the same in 2017? □ Increase  □ Decrease  □ Stay the same

Please Explain: __________________________________________________________

What was your chapter’s average membership number for 2016? ______

As of December 31, 2017, how many chapter members did your chapter have? ______
How does your chapter recognize young/new professionals? (Please select all that apply.)

- Special award recognition for up and coming young/new professionals
- Board position for young/new professional
- Young professional programs or professional development
- Discounts for young professionals
- We don’t do anything special for young/new professionals
- Other (Please explain below.)

How does your chapter recognize senior workforce professionals? (Please select all that apply.)

- Special award recognition for retirees
- Board position for retiree
- Retiree programs
- Discounts for retirees
- We don’t do anything special for young/new professionals
- Other (Please explain below.)

Does your chapter offer regular professional development or educational opportunities to members?

☐ Yes  ☐ No

When are the majority of your programs held?

- Morning
- Lunchtime
- Afternoon
- Evening
- Other (Please explain below.)
Please share the professional development or education events your Chapter held this year

What is the average number of people who attend these events? ______

What is the approximate registration fee for a **member** to attend a **chapter program**? $_________

What is the approximate registration fee for a **non-member** to attend a **chapter program**? $_________

Did your chapter host a Chapter Conference at least one day in length?  □ Yes  □ No

Please share your Chapter Conference program for 2017 (upload)

How many people attended the conference? _________

What is the approximate registration fee for a **member** to attend a **chapter sponsored conference**? $_________

What is the approximate registration fee for a **non-member** to attend a **chapter sponsored conference**? $_________

Which of the following did your chapter do in 2017, or is planning for 2018?

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Did in 2017 and planning for 2018</th>
<th>Did not do in 2017, but planning for 2018</th>
<th>Did in 2017, but not planning for 2018</th>
<th>Did not do in 2017 and not planned for 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>A conference, seminar, or other large event</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>A community service project</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>A partnership with another membership organization</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>A partnership with another IAWP chapter</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>A job listing</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Event Type</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>-----</td>
<td>-----</td>
<td>-----</td>
<td>-----</td>
</tr>
<tr>
<td>A WPDP study group</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hold an event to promote and honor CWP</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Workforce professional week events or activities</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>An IAWP chapter or regional conference</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

**What type of conference, seminar, or other large event(s) does your chapter hold?**

__________________________________________________________________________________________

__________________________________________________________________________________________

__________________________________________________________________________________________

**What type of community service event/project(s) does your chapter participate in?**

__________________________________________________________________________________________

__________________________________________________________________________________________

__________________________________________________________________________________________

**What membership organization(s) has your chapter partnered with, and how have you partnered?**

__________________________________________________________________________________________

__________________________________________________________________________________________

__________________________________________________________________________________________

**What did your chapter do to support Workforce Professional Week?**

__________________________________________________________________________________________

__________________________________________________________________________________________

__________________________________________________________________________________________
With regard to the CWP program, does your chapter: (Please select all that apply.)

- Promote the benefits and value of CWP certification
- Recognize CWP certified chapter members
- Offer CWP certified education programs
- None of the above
- Other (Please explain below.)

________________________

Does your chapter have a succession plan?  ☐ Yes  ☐ No

If yes, does your chapter review your succession plan annually?  ☐ Yes  ☐ No

If no, what are the reasons why your chapter doesn’t have a succession plan?

________________________

________________________

Which of the following does your chapter have? (Please select all that apply, and include your chapter’s social media information.)

- LinkedIn group
- Facebook
- Twitter
- Instagram
- Periscope
- Pinterest
- Snapchat
- Other
- None of the above
PART TWO: CAAR Evaluation

Part 2 of the online submission is the CAAR Evaluation. You will be asked to evaluate your chapter’s achievement in each of the CAAR elements. Remember, since CAAR is chapter-reported, the achievement level is indicated through this self-evaluation.

<table>
<thead>
<tr>
<th>Administrative Component</th>
<th>True</th>
<th>False</th>
</tr>
</thead>
<tbody>
<tr>
<td>The chapter’s mission, vision, and bylaws align with those of IAWP. Additionally, the chapter meets the IAWP brand identity guidelines.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>The chapter maintains written position descriptions for elected chapter board members.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>The chapter members participate in the nomination and election of the chapter board.</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
| The chapter creates an operational plan that includes but is not limited to: annual goals, communication/marketing strategy, recruitment/retention strategy, and succession planning strategy.  
  **NOTE: Template is available at ENTER WEBSITE. Chapter must upload a 2017 board roster through the survey submission site by January 31, 2018.**                                                                 | ☐   | ☐     |
| The chapter submits a current board roster in Excel format with CAR submission and updates IAWP Chapter Services as changes occur.  
  **NOTE: Template is available at ENTER WEBSITE. Chapter must upload a 2017 board roster through the survey submission site by January 31, 2018.**                                                                     | ☐   | ☐     |
| The chapter submits a current membership roster in Excel format to IAWP Chapter Services with CAR submission.  
  **NOTE: Template is available at ENTER WEBSITE. Chapters must upload a current membership roster through the survey submission site by January 31, 2018.**                                                               | ☐   | ☐     |
| The chapter board meets at least once per quarter and makes meeting minutes available to members.                                                                                                                                 | ☐   | ☐     |
| The chapter board completes a risk management assessment.  
  **NOTE: Template is available at ENTER WEBSITE. Chapters are not required to submit the assessment at this time.**                                                                                                | ☐   | ☐     |

If any of the above statements are “false,” please explain the reason why, and the steps your chapter is currently taking to make them true.
Financial Component

<table>
<thead>
<tr>
<th>True</th>
<th>False</th>
</tr>
</thead>
<tbody>
<tr>
<td>The chapter complies with all federal and state reporting requirements.</td>
<td>❏</td>
</tr>
<tr>
<td>The chapter board develops and approves an annual operating budget and makes it available to members.</td>
<td>❏</td>
</tr>
<tr>
<td>The chapter board ensures an annual internal or external financial review is completed by an individual or group not directly responsible for the management of the chapter’s finances.</td>
<td>❏</td>
</tr>
</tbody>
</table>

**NOTE:** All chapters are required to file annually Form 990 or Form 990N with the IRS. Chapter must upload its most recent balance sheet and income statement through the survey submission site by January 31, 2018.

If any of the above statements are “false,” please explain the reason why, and the steps your chapter is currently taking to make them true.

Membership Component

<table>
<thead>
<tr>
<th>True</th>
<th>False</th>
</tr>
</thead>
<tbody>
<tr>
<td>The chapter board assesses its members’ needs and satisfaction levels at least once per year.</td>
<td>❏</td>
</tr>
<tr>
<td>The chapter promotes IAWP membership to employment security staff at least once per quarter.</td>
<td>❏</td>
</tr>
<tr>
<td>The chapter promotes IAWP membership to workforce system partner staff at least once per quarter</td>
<td>❏</td>
</tr>
</tbody>
</table>

If any of the above statements are “false,” please explain the reason why, and the steps your chapter is currently taking to make them true.
Chapter completed at least 7 of the membership activities listed below or customized activities for the chapter... (Please select all that apply.)

- Mentions IAWP membership at the beginning of each chapter event
- Uses IAWP membership slides at each event highlighting the benefits of membership
- Has printed IAWP membership collateral displayed at each event
- Membership section in chapter newsletter
- Has a link to join IAWP on the homepage of the chapter website
- Has membership testimonials on website, in the chapter newsletter, and at meetings
- Promotes membership on Chapter social media
- Promotes membership through organization newsletters or websites
- Promotes membership at chapter conference(s)
- Promotes membership at chapter special event, including an information table with both chapter and IAWP materials
- Discusses membership recruitment at each board meeting
- Conducts a membership drive
- Holds a program on the value of membership
- Conducts new member orientations
- Holds an event to recruit IAWP members to chapter membership
- Markets IAWP at new employee orientation programs
- Other
- None of the above

Please describe your chapter’s other membership activities.

________________________

Professional Development Component

<table>
<thead>
<tr>
<th>Statement</th>
<th>True</th>
<th>False</th>
</tr>
</thead>
<tbody>
<tr>
<td>The chapter board members maintain IAWP membership and participate in both annual chapter and IAWP leadership development opportunities.</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>The chapter provides at least three professional development activities per year for members.</td>
<td>○</td>
<td>○</td>
</tr>
</tbody>
</table>

If any of the above statements are “false,” please explain the reason why, and the steps your chapter is currently taking to make them true.

________________________
### Communication Component

<table>
<thead>
<tr>
<th>Statement</th>
<th>True</th>
<th>False</th>
</tr>
</thead>
<tbody>
<tr>
<td>The chapter maintains a current website with up-to-date information.</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>The chapter disseminates a communication piece to members at least once per quarter that includes chapter and IAWP programs and initiatives.</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

*NOTE: Chapter must upload at least one copy of communication from 2017 through the survey submission site by January 31, 2018.*

<table>
<thead>
<tr>
<th>Statement</th>
<th>True</th>
<th>False</th>
</tr>
</thead>
<tbody>
<tr>
<td>The chapter board produces, and shares with members, an annual report that includes but is not limited to: membership numbers, financial performance, and progress toward annual goals.</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

If any of the above statements are “false,” please explain the reason why, and the steps your chapter is currently taking to make them true.

__________________________________________________________________________________________________________________________________________

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### Awards Component

<table>
<thead>
<tr>
<th>Statement</th>
<th>True</th>
<th>False</th>
</tr>
</thead>
<tbody>
<tr>
<td>The chapter solicits nominations for the IAWP awards program</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>In addition to the IAWP awards, the chapter has and solicits nominations for chapter specific awards</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>The chapter holds an annual awards ceremony to honor award winners</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>The chapter forwards nominations to IAWP for the international contest</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

If any of the above statements are “false,” please explain the reason why, and the steps your chapter is currently taking to make them true.

__________________________________________________________________________________________________________________________________________

__________________________________________________________________________________________________________________________________________

__________________________________________________________________________________________________________________________________________

How many hours did it take to gather the information to complete this survey? _________

How many hours did it take to actually take this survey once you compiled the appropriate information? _________

**Thank you, this concludes the 2017 CAAR workbook. If you have questions, or need additional support, please contact Steve Bent.**