AMERICAN SOCIETY OF SAFETY PROFESSIONALS
Region VI

Working together for a safer, stronger future.
Spring ROC 2020: Region VI

March 26, 2020

Julian Mercer - Regional Vice President
Paul Esposito - Northern Area Director
Matt Wilcox - Southern Area Director
Region VI

Spring Regional Operating Committee

- Chesapeake
- Colonial Virginia
- Delmarva
- Greater Tidewater
- Low Country
- National Chapter
- North Carolina

Chapters

- NOVA
- Piedmont
- South Carolina
- Star Valley
- Tarheel
- Triad
- Western Carolina
Welcome!

• Schedule  1:00pm – 5:00pm    Thursday March 26, 2020
• Agenda
  • Call to Order
    • Chapter Roll Call
    • Quorum Confirmation
  • Board of Directors Presentation
  • Chapter Operations Management Tool
  • Transition planning
  • ASSP Update
  • Webinar Series
  • Chapter Virtual Meetings
  • Resources
  • Regional Officer Reports
  • Council On Region Affairs update
  • Upcoming Schedule

Julian Mercer
Thomas Kramer
Matt Wilcox
Matt Wilcox
Arielle Semmel
Paul Esposito
Paul Esposito
Region VI
Julian Mercer
Julian Mercer
Our Safety Promise

Region VI ROC Meeting
Thom Kramer, Director At Large
We are committed to health & wellness

- ASSP in-person education events through May 15 – shifted to virtual or postponed
- ASSP committee meetings are being held virtually
- ASSP’s professional staff has transitioned to a remote working environment.
We Will Keep You Informed

- We Expect to Present Safety 2020
- The Board of Directors will revisit this decision at the end of April
- Early registration rate deadline extended through Monday, April 27
We Will Provide Support & Resources

- Content that can help members effectively respond to this pandemic at https://www.assp.org/coronavirus/
  - Webinar recordings
  - OSHA guidance & resources
  - COVID-19 member dialogue at community.assp.org
  - Articles & podcasts

- Resources to continue to be added and updated
- Share with your Chapter members
We Remain Focused

- Member Community
- Education
- Standards
- Value of the Profession
Trust
ASSP Responds to Latest COVID-19 Developments

During this period of heightened awareness over the coronavirus outbreak (COVID-19), the American Society of Safety Professionals (ASSP) is committed to ensuring the safety and health of all attendees at its events.

Welcome to the ASSP Community

Welcome! We're glad you're here. We hope you enjoy connecting with colleagues and finding new ways to get the most out of your ASSP membership. If you'd like us to show you around, click the button below.

View the ASSP Board Update

Board Update is a published report that aims to share information about the Board of Directors' meetings as it relates to the group's strategic and operational discussions, decisions and actions, as well as the anticipated outcomes of those activities.
Nimbleness
ASSP Doing Very Well

- US Member Market Share 36%/Viable Market 46%
- Strong Brand Recognition & Loyalty
- Industry Leading Annual Conference
- Known for Training & Cert Prep
- Seen as the Org to Promote Professional Development
Entering certification preparation space

Aggressive marketing & competitive targeting
Targeting non-industrial hygienist

New Competitors

BCSP
Board of Certified Safety Professionals

Entering certification preparation space

Online training companies

Sponsors

Industry associations with focus on safety

Traditional competitors

NATIONAL SAFETY COUNCIL
AIHA

Protecting Worker Health

Creating a safety discussion with industry focus

Promote specific knowledge around safety

Niche Associations

American Society of Safety Professionals

Complacency is not an option
Needs of Members

Source: Gallup: What Followers Want from Leaders
Questions
Thank you
Chapter Operations Management Tool

Matt Wilcox
Chapter Operations Management Tool (COMT)

Planning

Feedback & reporting

Chapter recognition

Points Change Every Year!
Streamline and simplify the tool for a more user-friendly experience: Findings

- Ease of navigation is a top concern among chapter leaders
- Chapter leaders would prefer streamlined access to the tool
### Charter Requirements

<table>
<thead>
<tr>
<th>Charter Requirements</th>
<th>Charter Rqts</th>
<th>COMT Pts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.2. Upload Chapter Operation Plan</td>
<td>Due – 8/15</td>
<td>8/1/19 – 25 pts</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8/15/19 – 0 pts</td>
</tr>
<tr>
<td>1.2. Upload Annual Chapter Leadership Rpt</td>
<td>Due – 5/31</td>
<td>5/15/20 – 25 pts</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5/31/20 – 0 pts</td>
</tr>
<tr>
<td>1.3. Upload Chapter Annual Financial Rpt</td>
<td>Due: 5/31</td>
<td>5/15/20 – 25 pts</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5/31/20 – 0 pts</td>
</tr>
<tr>
<td>1.5. Chapter Mtg Tracker (4 Tech Mtgs)</td>
<td></td>
<td>0-1 – 0 pts</td>
</tr>
<tr>
<td>- 2 Rpts peryr to AUC/ROC (RVP/AD)</td>
<td></td>
<td>2 = 50 pts</td>
</tr>
<tr>
<td>- 1 AOC/ROC meetings attended by chapter President or proxy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.10. Publish slate of candidates</td>
<td>Website – 25 pts</td>
<td></td>
</tr>
<tr>
<td>1.11. Post to Website</td>
<td></td>
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</tr>
</tbody>
</table>

### COMT - Requirements

**Section Total Points**

150

**Most points awarded:**

Attending at least 2 ROCs
Chapter Engagement / Membership / Communication

1. Story Submission
2. Partner with Other ASSP member communities
3. Personal/Welcoming Experience
4. Recognition of Members
5. Recruitment
6. Employment Information
7. Assessment
8. Communications
9. Chapter Website
10. Other Communication Methods
11. Service to Member Segments
12. Section Support

Points: 4,075
Community Outreach

Career Days
Student Scholarship/ASSP Foundation
Local org Involvement
Partner – Safety Orgs/Local Business
Safe +Sound Week

Points
• Listed – 250
• Other – 200
• TOTAL: 450
Professional Development

- Collaborate across Society for Speakers
- Technology to connect audiences
- Sponsorship Program
- Certification Study Group
- Offer CEU’s for Events

Points: 500
Leadership & Training

Chapter Leadership  Transition Activities  Succession Planning

Points: 1,825
Overview of Points

Sec. 1: Charter Requirements
- Listed: 150 points

Sec. 2: Chapter Engagement, Membership & Communication
- Listed: 3,375
- Other: 700

Sec. 3: Community Outreach
- Listed: 250
- Other: 200

Sec. 4: Professional Development
- Listed: 500

Sec. 5: Leadership & Training
- Listed: 1,425
- Other: 400

Status
Level/Scores
Bronze: 1,750 – 2,799
Silver: 2,800 – 4,199
Gold: 4,200 – 6,089
Platinum: 6,090 – 7,000
Overview – Percentage of Total

<table>
<thead>
<tr>
<th>Category</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charter Requirements</td>
<td>150</td>
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<tr>
<td>Chapter Engagement, Membership &amp; Communication</td>
<td>4,075</td>
</tr>
<tr>
<td>Community Outreach</td>
<td>450</td>
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<td>Professional Development</td>
<td>500</td>
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<tr>
<td>Leadership &amp; Training</td>
<td>1,825</td>
</tr>
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<table>
<thead>
<tr>
<th>Level</th>
<th>Scores</th>
<th>% of Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bronze</td>
<td>1,750 – 2,799</td>
<td>25 – 39.9%</td>
</tr>
<tr>
<td>Silver</td>
<td>2,800 – 4,199</td>
<td>40 – 59.9%</td>
</tr>
<tr>
<td>Gold</td>
<td>4,200 – 6,089</td>
<td>60% - 86.9%</td>
</tr>
<tr>
<td>Platinum</td>
<td>6,090 – 7,000</td>
<td>87 – 100%</td>
</tr>
</tbody>
</table>
By Comparison

<table>
<thead>
<tr>
<th>Level</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bronze</td>
<td>1,383 – 2,326</td>
</tr>
<tr>
<td>Silver</td>
<td>2,327 – 3,647</td>
</tr>
<tr>
<td>Gold</td>
<td>3,648 – 5,345</td>
</tr>
<tr>
<td>Platinum</td>
<td>5,346 – 6,290</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
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<th>Points</th>
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<tr>
<td>Platinum</td>
<td>6,090 – 7,000</td>
</tr>
</tbody>
</table>
Tools in Using COMT

Use this tool to help your chapter plan annual activities, track performances, and share your success with your colleagues and with the Society.

Show Your Chapter’s Value

Each chapter that completes and submits the Tool will receive a scale to award the chapter on its annual activities. The higher the score, the greater the benefit to the chapter.

Accessing the Tool

Each chapter president, president-elect, president and treasurer will receive a scale to award the chapter on its annual activities. The higher the score, the greater the benefit to the chapter.

The Purpose of This Tool

COMT provides an excellent resource.

Overview

Our Chapter Operations Management Tool (COMT) is a tool to help you plan your chapter’s annual activities, track performance throughout the year, and share your successes with the Society as you deliver the benefits to your chapter.

The COMT serves as a primary record-keeping mechanism for the chapter recognition program, which celebrates the outstanding work of ASFP chapters each year. Each chapter is assigned a certain point value that reflects how closely the activity helps chapters provide value to members and ASFP, as well as our recognition of the level of work involved. Chapters are recognized at the Chapter Recognition Luncheon during our annual conference each June.

This document provides guidance on how to plan and report your chapter’s activities each year. In addition, you can use this document to facilitate conversations with your EVP, Area Director, and Chapter Services about the direction and operations of your chapter.

Clarifications and examples are included for each question, with additional references for general guidelines to consider as you complete the COMT.

- Most questions in the COMT have several predetermined response options. These responses come from the insights gathered through online surveys and other tools that reflect chapter activities and operations. When you use the COMT as a planning tool, focus on the suggestions that provide the most value to your chapter’s success.

- The activities you report should reflect the positive effects of the chapter and not the individual efforts of chapter members. For example, when thinking about membership recruitment efforts, a chapter initiative such as a Board member challenge could be scored as the COMT. The work of an individual Board member who enjoys recruiting new members would not qualify (that person’s efforts can be recognized through the Our Members Get A Nice campaign).

- Each activity should only be counted for one function at the COMT. For example, the activity of sending a welcome email to new members should be listed once in each of the following categories: creating a personalized and welcoming environment (question 10), or as individual chapter communications (question 21), but not both.
<table>
<thead>
<tr>
<th>Chapter</th>
<th>18-19 COMT Points</th>
<th>18-19 COMT Level</th>
<th>19-20 COMT Points To Date</th>
<th>19-20 Website Update</th>
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<tbody>
<tr>
<td><strong>Northern Area</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Chesapeake</td>
<td>5095</td>
<td>Gold</td>
<td>25</td>
<td>Q1</td>
</tr>
<tr>
<td>Colonial Virginia</td>
<td>2545</td>
<td>Silver</td>
<td>50</td>
<td>Q1, Q2</td>
</tr>
<tr>
<td>Delmarva</td>
<td>3430</td>
<td>Silver</td>
<td>175</td>
<td>Q1</td>
</tr>
<tr>
<td>Greater Tidewater</td>
<td>3690</td>
<td>Gold</td>
<td>25</td>
<td>Q1, Q2, Q3, Q4??</td>
</tr>
<tr>
<td>National Chapter</td>
<td>5125</td>
<td>Gold</td>
<td>1750</td>
<td>Q1, Q2</td>
</tr>
<tr>
<td>NoVA</td>
<td>5370</td>
<td>Platinum</td>
<td>25</td>
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<tr>
<td>Star Valley</td>
<td>3770</td>
<td>Gold</td>
<td>25</td>
<td></td>
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<tr>
<td><strong>Southern Area</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low Country</td>
<td>3915</td>
<td>Gold</td>
<td>1300</td>
<td>Q1</td>
</tr>
<tr>
<td>North Carolina</td>
<td>5940</td>
<td>Platinum</td>
<td>25</td>
<td>Q1, Q2</td>
</tr>
<tr>
<td>Piedmont</td>
<td>3290</td>
<td>Silver</td>
<td>25</td>
<td>Q1, Q2</td>
</tr>
<tr>
<td>South Carolina</td>
<td>3060</td>
<td>Silver</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Tarheel</td>
<td>5355</td>
<td>Platinum</td>
<td>2445</td>
<td>Q1, Q2, Q3, Q4??</td>
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<tr>
<td>Triad</td>
<td>1685</td>
<td>Bronze</td>
<td>25</td>
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<tr>
<td>Western Carolina</td>
<td>3640</td>
<td>Silver</td>
<td>200</td>
<td>Q1, Q2</td>
</tr>
</tbody>
</table>

**19-20 COMT Point Levels**
- **Bronze**: 1750-2799
- **Silver**: 2800-4199
- **Gold**: 4200-6089
- **Platinum**: 6090-7000

**Last Year (18-19) COMT Point Levels**
- **Bronze**: 1383-2326
- **Silver**: 2327-3647
- **Gold**: 3648-5345
- **Platinum**: 5346-6290
Questions
Thank you
Transition Planning
Transition Planning

• Why
• What
• When
• How
• Where Can I Find Assistance
• Q&A
Transition Planning - Why

• Powerful way to share information and tools
• Continue to serve and grow chapters
• Review Roles and Responsibilities and ask questions
• Understand Key Dates
• Knowledge of what you are stepping into
• Legal Issues
• Society Requirements
Transition Planning - What

• A Time to Pass the Baton
• Review Your New Position Description
• Review Key Chapter Activities
  • Strategic Plan
  • Schedule of Chapter Events
  • Review Chapter Budget
  • Transfer Documents
  • Transfer Banking and Financial Responsibilities
  • Key Dates
Transition Planning - When

• Installation Dinner
• Last Meeting of the Previous Chapter Year
• June Luncheon
• Last Executive Committee Meeting of the Chapter Year
• After Elections are Official and Prior to July 1\textsuperscript{st} of the New Chapter Year
Transition Planning - How

• Meet with Previous Officer who held the position.
• Review Position Description
• Transfer documents or files
• Review Officer Transition Checklist (found on chapter leadership training in resources)
• Setup Email Account
• Review Key Dates List
• Take Leadership Position Training
Transition Planning – Resource List

- Officer Transition Checklist
- Sample Agenda for Transition Meeting
- Chapter Communication Technology Transition Information
- Leadership Position Training
- Operational Training
- Chapter Bylaws
- Treasurer & President – Chapter Financial Planning Guidelines
- Treasurer – Chapter Accounting Standard Operating Guidelines
Transition Planning – Resource Links
You will need your ASSP.ORG login information

- Chapter Accounting Standard Operating Guidelines
- 2020-2021 Financial Report
- Chapter Leadership Training Page
  - Leadership Position Training
  - Operational Training
- Officer Transition Checklist
- Chapter Communication Technology Transition Information
- Sample Agenda for Transition Meeting
- Leadership Roles Job Description Page
- Chapter Roster Instructions
Transition Planning – Q&A

• When should an internal audit of Chapter Finances be conducted?
  • Annually, at or near the end of the fiscal year, but before the start of the new Chapter year. Also immediately after a president or treasurer resigns or is removed from office.

• Who makes up your internal audit committee?
  • At a minimum; incoming chapter president, another chapter executive committee member, another member of the chapter who is NOT a member of the chapter executive committee in the financial year to be audited.
  • Outgoing treasurer and president will be available to provide records and answer questions

• Where can I find a new chapter year checklist for chapter financial management?
  • Chapter Accounting Guide – page 17
Transition Planning – Q&A

Questions are guaranteed in life; Answers aren't.
ASSP Update

• Arielle Semmel

• On line ASSP Community
Community on Your Chapter Website!
## 2019 Top Content by Replies: Safety Technical Talk Forum

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Title</th>
<th>Replies</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>What’s a Safety Training Ninja?</td>
<td>39</td>
</tr>
<tr>
<td>1</td>
<td>Safety Management Software</td>
<td>20</td>
</tr>
<tr>
<td>1</td>
<td>Safety Metrics/ KPI Best Practices</td>
<td>14</td>
</tr>
<tr>
<td>1</td>
<td>Evaluation for Contractors?</td>
<td>11</td>
</tr>
<tr>
<td>1</td>
<td>Training Matrix Template</td>
<td>10</td>
</tr>
<tr>
<td>1</td>
<td>Did You Know About ASSP Safety Podcasts?</td>
<td>9</td>
</tr>
</tbody>
</table>
What do We Need from You?

Your Support
Your support is critical to the success of the community. This is a community shaped by members for members. Remember, your chapter members will come to you with questions.

Your Participation
Contribute to the ASSP Community by highlighting chapter successes in Community Chatter or share your insight in Safety Technical Talk. Be sure to upload your user Profile Photo! Encourage your chapter members to contribute content.

Your Perspective
Share your unique insights as an ASSP Leader and establish yourself as a digital thought leader in front of all 39,000 members.
Future Plans for the ASSP Community

- Continue gamification through special profile badging & recognition
- Continue the ASSP Social Influencer Program
- New features rolling out (emojis, rating system)
Schedule Update

- **May 31** Upload Financial Report and Financial Checklist (AUDIT?)
- **June 1** Host transition meetings for new officers
- **June 22-25** SAFETY 2020 Conference in Orlando, FL
- **June 30** Final COMT report due
- **Aug 15** Annual Operational Plan
  - COMT Plan Excel tool (avail on Regional Web site)
- **Officer Training** On line
- **September 16-18** Region VI Professional Development Conference
- **Leadership Conference** Chicago, Oct 1-3
Questions
Thank you
Webinar Series

INTERNAL REGIONAL MEMBER SHARING

• First Friday of the Month 12:00 – 1:00
  • March 6th: Managing your Risk Assessment Data
  • April 3rd: Surviving a Deposition
  • May 1st: Intergenerational Communication and Mentoring
  • June 5th: Managing your Risk Assessment Data (repeat)

• Earn 0.3 CEUs if you attend ALL three
  • No credit for just attending one.

• $10 each
• Looking for more speakers for next series
Regional Virtual Meeting

• **Log in:** (credentials to be provided)
• Password: (to be provided)
• Settings: Calendar Sync
Resources at ASSP

• ASSP
  • Roberts Rules of Order
  • Chapter Management
    • Key dates, forms, rosters, etc.
  • Leadership Training on demand

• ASSP Region VI
  • Webinar Series
  • PDC Myrtle Beach
    • Discount Code
Questions
Thank you
Council on Region Affairs
2019 – 2020 Projects

Julian Mercer
Chapter President Responsibilities

1. Oversee ALL chapter operations
2. Complete required reports on time
3. Participate in Regional Operating Committee (ROC) activities
4. Promote membership and student development
5. Attend ASSP Leadership Conference (each Fall in Chicago)
6. Maintain chapter website and manage content
7. Participate in training for your position through ASSP Leadership On-Demand Training and expect the same from your exec board
Project Objectives

- One on-demand training module to provide an overview of the Code of Professional Conduct for member community leaders.

- One face-to-face training module to help member community leaders learn to apply good decision-making in their volunteer roles.
Project Objectives

1. Align the COMT to the value chapters are expected to deliver to members as outlined in Society Operating Guideline 8.10 and the revised chapter formation criteria

2. Streamline and simplify the tool to create a more user-friendly experience for chapter leaders within the technology that is available

3. Outline a general communication strategy to identify when to share what kind of information to most effectively support leaders

4. Right-size the recognition component to balance motivating leaders and holding chapters to a high standard of service to members
Align the COMT to the value chapters are expected to deliver: Findings

- Beyond fulfilling the requirement to submit an annual report, the connection between the tool and chapter charter requirements needs to be more clear.
- The connection between response items in the tool and what kinds of activities best serve members needs to be more clear.
- Chapter leaders would prefer a simplified tool.
Project Timeline

Sep.–Nov. 2019
Chapter operations committee reviewed existing COMT program

Dec. 2019
Committee surveyed chapter leaders

Jan.–Feb. 2020
Committee focused on objective 1

Feb.–Mar. 2020
Committee focused on objectives 3 & 4

Mar.–Apr. 2020
Committee focuses on objective 4

Apr.–May 2020
Committee provides recommendations to CoRA

May–June 2020
Council votes on recommendations

July–2020
2021 COMT program is launched

July–2020
2021 COMT program is launched
Streamline and simplify the tool for a more user-friendly experience: Recommendations

- Explore adding buttons to each page to improve navigation
- Provide COMT link through My Groups tab on ASSP website
- Enable points tracking within the tool to support goal-setting
Upcoming

- Safety 2020 – June 23rd thru June 25th
THANK YOU