The Purpose of the Chapter Achievement Program (CAP)

- **Purpose:**
  - CAP is an achievement and recognition program for chapters that uses points to recognize chapter activities that align with the North American Strategic Plan. The program helps to set minimum standards of performance for service to members and to the profession. It also provides a means to evaluate chapter success.

- **Chapter Achievement Program (CAP) Role:**
  - CAP Chair
  - Other
AN INTRODUCTION TO CAP

• It’s an Excel Spreadsheet
  – Service to the Members
    • Education
    • Networking
    • Certification
  – Service to the Profession
    • Outreach to the Community
  – Chapter Administration
    • Reporting
    • Administration

INTRODUCTION TO CAP

• Excel Spreadsheet
  – Service to Members
  – Service to Profession
  – Chapter Administration

• Planning Tool
  – Educational Programs
  – Outreach Efforts
  – Check List
  – Reporting Calendar
Click on the drop down and find your chapter name. This will fill-in the cells with your chapter name and the number of Chapter members as of June 1st.

ChapterRelations@theiia.org

Sub-totals from the three sections appear here at the top of the report.
New to CAP

Quarterly Reporting

Who should receive CAP?

Send copies to:
1. ChapterRelations@theiia.org
2. Your District Representative
3. Your District Advisor
4. Other Chapter Officers
What’s New/What’s Different

New Annual Chapter Standards

- Maintain an active incorporation status
- Maintain a minimum of 15 members
- Submit independently review financials utilizing the required template by August 31st
  - Chapters can request up to a 45-day extension. Report must be submitted on later than October 15th or chapters will forfeit their allotment.
- Put forth a Slate of Officers by May 1st
  - Four key officers: president, vice-president, secretary, treasurer
- Deliver quality education to its members thru CPE’s
- Sign and submit Governance Attestation
- File required government forms, i.e., 990, 1044, etc.
Changes to Reporting in 2017-2018

SERVICE TO MEMBERS

A PLANNING TOOL:
SERVICE TO MEMBERS

A PLANNING TOOL:

It is at the bottom of the Service to the members section that chapters record their social events and IIA certification information.
SERVICE TO THE PROFESSION

OUTREACH TO NON-MEMBERS AND THE COMMUNITY

<table>
<thead>
<tr>
<th>SERVICE TO THE PROFESSION (200 minimum CAP Points required)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Relations</td>
</tr>
<tr>
<td>Academic Relations: Applications submitted for the Esther R. Saeber Research Award (Student must be an AHP student) 5 points / no max</td>
</tr>
<tr>
<td>Academic Relations: Applications submitted for the Michael Kean Scholarship Award 4 points / no max</td>
</tr>
<tr>
<td>Academic Relations: Assist an AHP authority advance levels within the AHP program 10 points / no max</td>
</tr>
<tr>
<td>Academic Relations: Chapter Scholarship Program - 1 point per $100 up to $1000, 2 points for each additional $1000 / no max</td>
</tr>
<tr>
<td>Academic Relations: Contribute to AAMP 3 point per $100 up to $2000, 2 points for each additional $1000 / no max</td>
</tr>
<tr>
<td>Academic Relations: Develop an approved AHP program with a post-secondary school 25 points / no max</td>
</tr>
<tr>
<td>Academic Relations: Participate with development of an AHP approved student Chapter 20 points / no max</td>
</tr>
<tr>
<td>Academic Relations: Sponsor student attendance at chapter meetings 0.5 points per student / no max</td>
</tr>
<tr>
<td>Academic Relations: Student events held by the chapter 5 points / no max (plus credit under Service to Members if applicable)</td>
</tr>
<tr>
<td>Academic Relations: Submit Internet Academic Awareness Program Application (contact <a href="mailto:academics@healp.org">academics@healp.org</a> for application) 15 points</td>
</tr>
</tbody>
</table>

Performance like a ROCKSTAR
Your Road Map to Success

Chapters can use CAP to go in different directions depending upon the passion of each chapter volunteer.

What’s your passion?

- Academic Relations
- Advocacy
- Audit Executive Center
- Certification
- Educational Programs
- Membership
- Networking events
- Newsletters
- On-site Training

- Quality Assessment
- Promoting IIA Seminars and Conferences
- Research Foundation
- Scholarship Programs
- Social Media
- Student Events
- Website
- Writing Articles
Menu of Activities

- CAP Spreadsheet
- CAP Point Description
- Miscellaneous Activities

ChapterRelations@theiia.org

CHAPTER ADMINISTRATION

CHAPTER REPORTING, PARTICIPATION AND COMMUNICATION
Chapter Leader Training

- Leader Attendance at Leadership Academy (April):
- Leader Attendance at District Workshops (May-July):
- Leader Attendance at HQ Executed Role Specific Webinars (available on-line all year long.)

COMMUNICATION TOOL
CHAPTER LEADER RECOGNITION

PERFORMANCE LEVELS

- Service to Members: 325 Achievement Credits
- Service to Profession: 200 Achievement Credits
- Chapter Administration: 160 Achievement Credits

BRONZE: 685 Credits  SILVER: 1,060 Credits  GOLD: 1,560 Credits

Minimum in All Three Levels
2017-18 CAP ACHIEVEMENT LEVELS

- Platinum is achieved by maintain Gold status 10 out of 11 years.
- Ruby is achieved by maintain Platinum status for 10 consecutive years
- Sapphire is achieved by maintain Platinum status for 15 consecutive years

CAP Recognition 2015-16

- Out of 161 Chapters
- 17 Achieved Sapphire
- 13 Achieved Ruby
- 60 Achieved Platinum
- 39 Achieved Gold
- 2 Achieved Silver
- 1 Achieved Bronze
Chapter Leader Testimonials

"This is the most useful documentation any newbie could want."

The Evolution of CAP 2.0
The evolution of CAP 2.0

2017-2018 Chapter year
• Service to Members
• Service to Profession
• Chapter Admin

2018-2019 Chapter year
• Chapter Health (Governance)
• Members First
• Professionalism

Chapter Health (Governance)

• Deliver quality CPE programs vs. quantity of program
• Designated Chapter Administrator
• Designated Web Administrator
• Incorporation Status Confirmation
• Annual Financial Report utilizing the IIA provided budget template
• File Form 990, 990EZ or 990N as required by IRS
• Chapter Compact Attestation
• Review of Chapter Bylaws
• NEW: Annual Slate of Officers to DR/DA and HQ by May 1, 2018
Members First

Membership Growth, Certification Growth, CPE offerings, Volunteer Opportunities, and Social Programming

Professionalism

- Academic Relations
- Advocacy
- Audit Executive Center
- Certification
- CIA Learning
- IIA Conference Promotion
- Seminars/Quality/Research/Speaking

Best Practice Submissions
The Evolution of CAP 2.0

• Begins June 1, 2018
• New On-line Tool
• Chapter Dashboard
  – At a glance updates
  – Reporting Reminders
  – CAP achievement status

Questions

District Representative
Chapter Relations Manager
ChapterRelations@theiia.org