

Chapter Planning Report – due October 1

The Chapter Planning Report is a document that helps the chapter assess its strengths and areas for improvement in the various areas of chapter management defined by the Chapter Models. Different officers are responsible for different sections of the report, but the Vice-President should compile all the sections and submit them together to the national headquarters by October 1. Use the Chapter Planning Report as a resource document, planning tool and beginning of the year assessment for the chapter throughout the course of the year. Your Regional Chapter Coordinator will refer to this information when they work with the counselor and chapter officers.

Mail all pages of the report to: Kappa Delta Pi, 3707 Woodview Trace, Indianapolis, IN 46268-1158 or fax to 317-704-2323.

Chapter Name: _____ **University Name:** _____ **Chapter Model:** _____

Section 1 - Leadership (President)

Officer Training

Ideally, new chapter officers should go through a thorough leadership retreat given by the Counselor and/or Associate Counselors. This training should be inclusive of all aspects, including specific job duties, committee responsibilities, chapter management, national requirements, yearly reports, tentative meetings and activities for the upcoming year, and other initiatives specific to the chapter. The leadership retreat also serves to develop rapport among officers, so that there is a strong cohesive team serving the chapter members. Because it is an all inclusive leadership retreat, many chapters will allot a complete day to accomplish the goals. Ideally, a shorter, less formal transitional training should be done with outgoing officers and incoming officers in the spring.

- Are you planning a Leadership Training & Planning Retreat? **Month:** _____
- Are you planning a Transitional Training with Outgoing Officers? **Month:** _____
- Are you planning to have officers attend an Officer Training Webinar?
President **Month:** _____ Treasurer **Month:** _____
Vice-President **Month:** _____ Membership Chair **Month:** _____

Required, Optional, and Co-Officers Positions

Each Chapter Model has a set of required officer positions that need to be filled by a current, active member of KDP. Those positions are required and cannot be changed or omitted. There are also additional optional officer positions or co-officers that a chapter may add to manage particular needs of the chapter or provide additional opportunities for leadership.

- Officer Elections **Month:** _____

Officer Report with the names, positions, and contact information of required, optional or co-officer position is due October 1.

Executive Committee

All required officer positions make-up the governing board or Executive Committee. The Executive Committee is required in all Chapter Models. The President directs this committee and the Counselor serves as advisor. The Chapter Model selected determines how many times the Executive Committee and/or all officers meet to discuss new/old business or information from the national HQ that should be communicated to the chapter or included on the agenda for a general chapter meeting.

- Fall Semester Executive Committee/Officer Meeting Months: _____
- Spring Semester Executive Committee/Officer Meeting Months: _____

Committees

The Chapter Model selected determines the number of required committees the chapter has. Committees are a great way to delegate work, get chapter members involved, and help develop future chapter leaders.

Choose the committees required for your Chapter Model and indicate when they will be meeting:

- Membership Committee**
 - o Months for Fall Meetings Planned: _____
 - o Months for Spring Meetings Planned: _____

- Programming Committee**
 - o Months for Fall Meetings Planned: _____
 - o Months for Spring Meetings Planned: _____

- Fundraising Committee**
 - o Months for Fall Meetings Planned: _____
 - o Months for Spring Meetings Planned: _____

Choose the Optional Committees your chapter has:

- | | |
|---|---------------------------------|
| <input type="checkbox"/> Fundraising Committee | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Communications Committee | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Historical Committee | <input type="checkbox"/> Other: |
| <input type="checkbox"/> Awards & Recognition Committee | <input type="checkbox"/> Other: |

Counselors

Counselors must maintain an active membership and serve as the main contact person for the chapter. With the key chapter officers, they act as liaisons with HQ and are responsible for disseminating and communicating national initiatives to members. One important role is to oversee officer training to ensure they have all the tools and resources they need to do their job. Counselors are responsible for providing continuity to the chapter, advising committees, ensuring that KDP standards and university requirements are met, and checking that assigned work is completed.

Each Counselor attends a New Counselor Orientation (NCO) within 30 days of taking over responsibility for the chapter. The orientation covers vital aspects of managing the chapter as well roles and responsibilities of the counselor and officers. Counselors are also required to participate in additional live or virtual training every two years.

Name and contact information for all counselors or associate counselors should be on the Officer's Report due October 1.

- How long has the Counselor been working with the chapter? _____ months/years

- When did the Counselor(s) last complete a New Counselor Orientation (NCO)?
 - o Counselor _____
 - o Associate Counselor _____
 - o Associate Counselor _____

Chapter Bylaws

Chapters should review and update their bylaws every two years to reflect changes from Convocation and to reflect any changes in local chapter operations or membership requirements. Proposed changes must be passed by a two-thirds majority vote of the chapter. The Counselor and President must sign the updated bylaws and send them to HQ for approval within 14 days after members vote to implement changes. Officers can download the bylaws template from the KDP web site. Take care when completing the template as no information may be deleted. Chapters may add information; however, it is advisable to consult with your Regional Chapter Coordinator before any additional information is added to the bylaws. Any policies that govern the chapter must be included in the bylaws template, otherwise it is not enforceable.

- Date the chapter last updated its bylaws? _____

- Does the Executive Committee plan on updating the bylaws this year? Yes: ____ No: ____

Section 2 – Membership: Recruitment, Initiation, Retention (Membership Chair)

Recruitment Goal

National HQ assigns each chapter a recruitment goal to assist them in striving to offer the KDP membership opportunity to the most number of eligible students. Membership in KDP not only recognizes outstanding academic accomplishment, but it also provides valuable educational resources, a supportive community of fellow educators, and a rich legacy to assist members throughout their entire educational career. KDP expects chapters to extend an invitation to join to all eligible students, which should equal the top quintile of the department/college of education. Recruitment goals are based on initiating a percentage of those eligible students while taking into consideration past chapter recruitment performance.

- What is the chapter's Recruitment Goal (use calculations based on your Chapter Model)? _____

- What are three things the chapter will do to reach its membership goal?
 - _____
 - _____
 - _____

- Does the chapter intend on holding an initiation in: ___ Fall Only ___ Spring Only ___ Both Semesters

Chapter Membership Requirements

KDP has established minimum criteria for undergraduate and graduate students to join. Chapters may increase this criteria with approval from National Headquarters.

- Who does the chapter invite to membership? ___ Undergrads Only ___ Grads Only ___ Both

- Does the chapter invite eligible sophomores? Yes: ___ No: ___

- What criteria is used for membership:
 - Undergraduate students:
GPA _____ # of Credits _____ Other: _____

 - Graduate students:
GPA _____ # of Credits _____ Other: _____

- Does the chapter use other criteria? (ie – program attendance, service hours, etc) Yes: ___ No: ___

- Describe how the chapter gets a list of eligible students to invite and how the chapter verifies the eligibility requirements. _____

Informational Meeting

This is an introduction about Kappa Delta Pi. It can be for all interested students regardless of their eligibility or invited students who are eligible for membership. The Informational Meeting is public relations tool to increase awareness of the ideals of the Society, the chapter's legacy and current initiatives, and inform about general benefits that come with membership. Regardless of when the chapter conducts the Informational Meeting, it is important to the chapter's recruiting efforts to have one.

- When will the Informational Meeting be conducted? Fall: _____ Spring: _____

- Who will be invited to the Informational Meeting? _____

Invitation to Membership

Your invitation to join may be the potential member’s first official contact with your chapter, so you will want to make it positive and professional. Impress upon potential member the honor of the invitation and the reasons why someone would want to join Kappa Delta Pi. Inviting potential members can be done in various ways – through letter, email or personal delivery. Whatever the method, the invitation should be warm and inviting. Don’t forget to follow up with students who give no reply to the invitation; the membership chair should contact potential members that do respond by the due date to ensure that the invitation was received or to find out why they may not want to join.

- Describe how the chapter invites potential members to join.

- How soon before the date of initiation do invitations go out? _____

Pre-Initiation Planning

The membership chair should set a deadline for those students who are invited to meet with a chapter leader to pay the membership fees and complete the KDP Initiation Form. This should be completed at least one week before the initiation is scheduled to provide time to deposit the checks, order necessary supplies for the initiation, and print the program. **Do not induct invitees the night of the ceremony if they have not paid.**

Planned Date of Initiation Ceremony: _____

Approximate Date

- Officers review the Initiation Guidebook for set-up instructions _____
- Officer rehearsal of ceremony _____
- Deadline for when KPD Initiation Forms and membership fees due _____
- Order New Member Supplies from KDP Store _____
- Send all Initiation Forms and one check to KDP HQ _____
- Give all new members certificate, creed and membership info booklet _____

- Will the Membership Chair create a program with each inductee’s name? Yes ___ No___

- What ceremony enhancements will your chapter use for this initiation? _____

- Does the chapter promote the two-year membership option? Yes ___ No___

- Does the chapter offer an alternative make-up ceremony to those potential members unable to attend on the scheduled date of initiation? Yes ___ No___

Orientation Meeting

The membership chair should conduct a Membership Orientation Meeting to welcome the member as a full participant in the chapter; explain the local chapter structure, its programs, opportunities for involvement and participation expectations; specifically go over the local and national benefits of membership; and connect the new member with other members of the chapter. This is also a good opportunity to explain membership benefits both in college and into the professional career, as well as how to renew membership for continued opportunities.

- How long after Initiation will the Orientation Meeting be conducted? _____
 - How will the chapter conduct the Orientation? _____
-

Member Retention

Kappa Delta Pi is a lifelong professional association that helps to support educators throughout their career. However, whether a member is considered active or inactive depends on whether (s)he pays their national and chapter dues.

- ◆ **Active Member:** Any member whose national dues and chapter dues are paid.
- ◆ **Inactive Member:** Any member who has not paid their national dues or chapter dues.

HQ Role in Retaining Members

KDP contacts members through email three months before their membership expires to remind them to renew. Then KDP mails a renewal form during the 11th month of their membership. If the member does not renew, they are sent another e-mail during the 12th month of their membership before it expires. Once the membership expires, one final e-mail goes to members during the 13th month to remind them to renew. Some chapters have implemented their own additional retention initiatives.

Chapter Role in Retaining Members

The Membership Chair and membership committee should work on retention at least once each semester. The Membership Chair may contact HQ to obtain a list of active and inactive members for these initiatives. It is important to work closely with the Vice President and the Programming Committee who are responsible for surveying members and implementing programs that appeal to members' interests while meeting national requirements. In order for the retention initiatives to be successful, there must be a collaborative effort.

- What are three things the chapter will do to reach out to inactive members and encourage them to renew?
 - _____
 - _____
 - _____

- Does the chapter survey members to find out why they have decided not to renew? Yes ____ No ____
- Does the chapter allow inactive members to participate in meetings and activities? Yes ____ No ____
- Does the chapter have a Member Awards & Recognition Program? Yes ____ No ____

Section 3 – Chapter Activities and Programming (Vice-President)

Below are a category of events and activities that your chapter might consider conducting this year. Use the information to help you layout the plan for the year. While some chapters will have events in almost all categories, some categories may not be applicable to every chapter. For example, some chapters choose to focus their efforts entirely on literacy or professional development. For other chapters, this new roadmap may help you develop fresh ideas that could serve to rejuvenate your members. A calendar of events should be shared with chapter members at the beginning of the year as committees are formed and events are finalized. Remember, if the chapter's financial or human resources are limited, it doesn't mean that there is nothing that can be done. Partner with other organizations on your campus, within your community, or even nearby KDP chapters to co-sponsor events and activities, such as training or professional speakers.

Chapter Meetings

Chapter Meetings are used as a way to convey information to members about initiatives or upcoming programs. Any changes affecting the chapter's bylaws are voted on during these meetings. Keep in mind that the executive committee should first meet to come to a consensus on ideas before presenting them to the general membership. It's also good to remember that everyone is busy and most people do not like to meet for the sake of meeting without a clear, specific agenda or incentive. The best incentive is to develop the chapter meeting in conjunction with a professional workshop or guest speaker. The number of meetings each chapter is required to have is based on the Chapter Model selected.

List the months and the program/activity of each meeting you would like to plan this year.

- Meeting #1 Month: _____

- Meeting #2 Month: _____

- Meeting #3 Month: _____

- Meeting #4 Month: _____

Member Participation

A Post-Initiation Incentive Program (PIIP) is used as a way to increase participating after joining by rewarding members for their dedication to the chapter. PIIP should be constructed so as to reward members for their work in the chapter, not as a way to punish them. A PIIP can be constructed in many ways. Most chapters use a point system. Requirements may include attending a specified number of meetings, participating in a specified number of chapter activities, serving as an officer, or serving on a committee. Rewards can include honor cords, letters of recommendation, free chapter membership for the year, or anything that will motivate the members in your particular chapter. The PIIP should be included in the bylaws and sent to HQ for approval before implementation can begin. Chapter leaders should confer with their Regional Chapter Coordinator as they devise the program.

- Does the chapter have a Post Initiation Incentive Program (PIIP)? Yes ___ No ___
- Is the program included as part of the chapter bylaws? Yes ___ No ___
- Please describe the program if you have one. _____

Chapter Programming

Chapters are encouraged to plan program for members, education students, or the campus or general community. The number and general content area of required programs are based on the Chapter Model selected.

Professional/Career Development

Professional development encompasses speakers and resources to share worthy educational ideals and is the best way that chapters can distinguish themselves as a professional honor association on their campuses. When other organizations focus on service projects, Kappa Delta Pi chapter focus on attracting professional speakers or developing a speaker series by tapping in the educators and administrators from the community. Career development focuses on resume writing, interviewing skills, dressing for success in the workplace, and other similar topics. This is a great opportunity for collaboration with the School of Education to prepare undergraduates before they start student-teaching or before they graduate.

- Program Planned: _____ Month: _____
Is this a collaboration with another KDP chapter, campus organization or community group? Yes ___ No ___

Event Description:

- Program Planned: _____ Month: _____
Is this a collaboration with another KDP chapter, campus organization or community group? Yes ___ No ___

Event Description:

Service/Community Outreach

One of the founding ideals of Kappa Delta Pi is service. Please keep in mind that service projects should ideally have an educational component to them. For example, if a chapter volunteers to work in a battered women shelter, then part of the service should focus on reading to their children or helping with homework.

- Program Planned: _____ Month: _____
Is this a collaboration with another KDP chapter, campus organization or community group? Yes ___ No ___

Event Description:

- Program Planned: _____ Month: _____
Is this a collaboration with another KDP chapter, campus organization or community group? Yes ___ No ___

Event Description:

Alumni Relations/Mentoring

A great way to keep members involved is to work with alumni on programs that they are interested in. This could be simple things like getting them involved in a major service project during Homecoming activities or inviting them to speak to the chapter about their first year of teaching. Alumni can also serve as mentors to chapter members still in school. Chapter members can also reach out to provide mentoring programs to non-KDP members in the School of Education or to local elementary or high-school students.

- Program Planned: _____ Month: _____
Is this a collaboration with another KDP chapter, campus organization or community group? Yes ___ No ___

Event Description:

- Program Planned: _____ Month: _____
Is this a collaboration with another KDP chapter, campus organization or community group? Yes ____ No ____

Event Description:

Fundraising

The chapter should fund-raise consistently throughout the year to have enough money for its activities; to send representatives to CONVO; to pay for ceremony enhancements, to pay for honor cords, to participate in other Society sponsored events; or even to start a scholarship. The Treasurer and Counselor should decide which areas to allocate funds and how much should be allocated. While it is not required, it is strongly recommended that the Treasurer and Foundation Representative work together to head a Fund-raising Committee. Fund-raisers should be done independently, outside of collaborations, so that the chapter may maintain the proceeds.

- Fundraiser Planned: _____ Month: _____
What are the funds raised to be used for?

Event Description:

- Fundraiser Planned: _____ Month: _____
What are the funds raised to be used for?

Event Description:

- Fundraiser Planned: _____ Month: _____
What are the funds raised to be used for?

Event Description:

Educational Foundation and Giving

It is the responsibility of the Foundation Representative to inform members of Society scholarships and grants and encourage them to apply. (S)he may also work closely with the Treasurer to create a scholarship for members, ensure that pledged contributions for an existing scholarship are submitted, or fund contributions to the Kappa Delta Pi Educational Foundation which awards approximately \$100,000 in scholarships and grants to Kadelpians each year.

- Is the chapter planning to contribute to the Foundation this year? Yes ____ No ____ How much \$ _____
- Is there a current chapter scholarship/grant through the Foundation that the chapter will award this year?
Yes ____ No ____
- Is the chapter interested in establishing a scholarship through the Foundation specifically for your members?
Yes ____ No ____
- Is the chapter planning on applying for a *Literacy Alive!* grant this year? Yes ____ No ____

Communications & Website

- How does the chapter communicate with its members?

___ List serve ___ Yahoo Group/Chat ___ Phone Conference ___ Newsletter
___ Web site Web site Address: _____
___ Other:

- How frequently does the chapter communicate through the above method? _____

Awards and Recognition

Implementing a simple awards & recognition ceremony would be a great way to thank members for their work in the chapter. The ceremony can be done in conjunction with a Cording Ceremony which cords graduates. Recognition for chapter members might be a certificate and pin or certificate and gift/gift card for members in the areas of outstanding service, teaching, or whatever else the chapter leaders determine.

- Does the chapter have an awards & recognition program for members? Yes ___ No ___
- Does the chapter have an honor cord ceremony to recognize graduates? Yes ___ No ___

Please indicate your chapter's interest in and eligibility for the following national awards based on your Chapter Model and your assessment of whether the chapter meets the eligibility criteria:

- Achieving Chapter Excellence (ACE) – Silver Level ___ Interested ___ Eligible
- Achieving Chapter Excellence (ACE) – Gold Level ___ Interested ___ Eligible
- ACE of the Ace (only for Advanced Model Chapters) ___ Interested ___ Eligible
- Program Award – Service ___ Interested ___ Eligible
- Program Award – Fundraising ___ Interested ___ Eligible
- Program Award – Communications ___ Interested ___ Eligible
- Program Award – Membership ___ Interested ___ Eligible
- Program Award – Professional Development ___ Interested ___ Eligible
- Distinguished Chapter Officer Award ___ Interested ___ Eligible
- O.L. Davis Jr. Counselor of Distinction Award ___ Interested ___ Eligible