HFTP Global Updates
Chapter Management, Support & Services
HFTP Chapter Affiliation Agreement Review
Chapters

- HFTP Global Chapters:
  - 60 Professional
  - 22 Student
  - With 13 of those in international locations

- 93% of HFTP Members are Affiliated with a Chapter

- Chapters provide members educational opportunities, social networking and localized resources to members and industry stakeholders.

- Chapters help grow the association with grassroots membership retention efforts and recruiting new members.
Chapter Activity

84 Chapter Meetings & Events since July 2017

- 60 Educational
- 6 Charity
- 18 Social/Holiday

<table>
<thead>
<tr>
<th>Month</th>
<th>Total Events</th>
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</thead>
<tbody>
<tr>
<td>July 2017</td>
<td>28</td>
</tr>
<tr>
<td>August 2017</td>
<td>22</td>
</tr>
<tr>
<td>September 2017</td>
<td>34</td>
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Chapter Administration

- IRS Global Tax-Exempt Group Charter Filed
  - August 4, 2017
    - Chapters participating in the Group Charter: 34
    - New Chapters participating in the Group Charter: 13

- Chapter of the Year Scorecards
  - Released to chapters: July 25, 2016
  - Returned from chapters: August 31, 2017
  - Winners Selected: September 2017
Chapter Leadership Transition Toolkit Released was released. This toolkit was Designed to assist our Chapter leaders by answering questions about Chapter administration, the Chapter’s relationship with HFTP Global, and to direct leaders to helpful resources and services.

• Provided all chapters with Funding Estimates for 2018.

• Developed a chapter bank recovery process to assist chapters when issues arise with bank accounts during leadership transition.

• Chapters received a status on affiliation requirements for events and chapter leader webinars.

• Student chapters received information on required documents for affiliation.
Chapter Management Support & Services

- Two Full-Time Chapter Relations Coordinators are on Staff – Dedicated to Support and Serve the Chapters:

Victoria Schaefer

Barbara Semeraro
Chapter Management Support & Services

• Microweb sites are available for each Chapter
  – Event listings and promotion
  – Listing of new members
  – Listing of officers and board
  – Listing of current CHAE and CHTP certification designees

• Chapter Funding & Support
  – HFTP has budgeted to spend approximately $352,000 (USD) in chapter support, within the next budget year.
Chapter Relations & Chapter News

• All Chapter events and meetings are followed by HFTP staff and a tracking system maintained for activity and history within each chapter.

• Promoted chapter charity events through social media channels.

• Promoted chapter social events, uploading photographs to chapter websites and via HFTP News.

• Coordinated chapter advertisements and president recognition in the Annual Convention Commemorative printed program.
Chapter Leadership Portal

• Current Membership Rosters for Chapter Leaders
  – Full Membership Roster
  – New Members
  – Expiring Members

• The Chapter Leader Resource Center
  – Chapter Leader Must Haves Documents
  – Presentations, Information, Requests and Forms

• Toolkits
  – Membership Recruitment – over 31 templates and branded support items
  – Leadership Transition and Succession Planning

• Chapter Management supporting documents
  – Affiliation Agreement
  – Chapter Management Plan
Chapter Leadership Portal Cont.

• **Chapter Management with over 30 Supporting Documents**
  – Affiliation Agreement
  – Chapter Management Plan
  – Tax Information
  – Budget samples
  – Funding Information
  – Installation Script samples
  – Visit Request Forms

• **Chapter Leader Newsletters**
  – A running 12 months of archives
  – Useful information to keep chapters on track for success
  – Provides upcoming deadlines for chapter administration
    • Tax filing, officer elections, end-of-year reporting
    • Published calendar dates to remember and deadlines
Chapter Leadership Submission Center

• **End of Year Reporting Requirements**
  – Nine (9) forms are required at end of year reporting
  – Funding statuses for the next operating year are determined based on reporting
  – Funding estimates are also sent in the summer
  – Required to maintain a good standing chapter status, as an affiliate with HFTP Global

• **Additional Requests & Submission Forms**
  – New Chapter Leadership Submissions
  – HFTP Global Officer Visit Requests
  – Chapter Hosted Certification Review Sessions and Exams
  – Chapter Event Marketing Requests
  – Stipend Requests
  – Sponsorship Requests
  – Quarterly Reports
Chapter of the Year Awards

• Awarded here at the Annual Convention
  – Tier A: 1 – 35 members, Tier B: 36 – 70 members, Tier C: 71+ members
  – Tiers are based on member counts
  – Awarded based on a chapter’s performance within their tier
  – Scorecard calculations determine the winner of each tier
  – Will be awarded during the Tribute to Success, Friday night.
Where are the HFTP Chapters listed?
Where is the Chapter Leadership Portal located?
HFTP Website - Chapter Information

• Where are the Chapter Rosters & Resource Center Located?
HFTP Website - Chapter Information

Where are the Chapter Rosters Located?

You are authorized to request any chapter's roster by entering its chapter number in the box below. After you have entered a chapter number, select a roster type report. The roster will be assembled and emailed to you as a Microsoft Excel spreadsheet file.

Enter Chapter Number

Submit

Full Roster (Found 122 Records)
Download Full Roster

Renewal Roster (Found 24 Records)
Renewal rosters will include members whose HFTP membership expiration dates are within three months in the future or one month in the past.
Download Renewal Roster

New Members (Found 6 Records)
New member rosters will include those who have been members for three months or less.
Download New Members Roster

On the Chapter Leadership Portal Page (scroll down).
Login is required to view rosters.
Three (3) roster types are offered.
Where are the Chapter Leader Must Have Documents located?

CHAPTER LEADER RESOURCE CENTER
The information and resources provided on this page are designed to help our Chapter Leaders Govern and maintain their chapters.

Please note that HFTP Website login is required to view certain information and links on this webpage, which is specifically designed as resources for our chapter leaders.

CHAPTER LEADER MUST HAVES
Please note that HFTP Website login is required to view certain information and links on this webpage, which is specifically designed as resources for our chapter leaders.

- 990 N (e-postcard) (Link)
- SS-4 Instructions (PDF)
- HFTP Tax Information (PDF)
- Chapter Surveys (PDF)
- Disclaimer for Outside Chapter Events (PDF)
- Chapter Affiliation Agreement (PDF)
- Chapter Funding (PDF)
- Chapter Officer Descriptions (PDF)
- Uniform System of Accounts for Chapters (PDF)
- Chapter Leader Transition Toolkit (PDF)
- Sample Chapter Officer Installation Script (PDF)
- Chapter Management Plan (XLS)
- Sample Bylaws (DOC)
HFTP Website - Chapter Information

- Chapter Leader Must Haves Documents

Scroll Down on the Chapter Leader Resource Center Page

PRESENTATIONS AND INFORMATION:
- HFTP Chapter Leader Orientation
- HFTP 2016 - 2017 Chapter Leader Calendar
- Chapter Website Training (Video)
- Chapter Legal Scenarios (PDF)
- HFTP Logo Usage Guidelines
- HFTP Logo Standards
- HFTP Association Update
- Certification Application and Educational Maintenance Presentation (PPSX)

REQUESTS & FORMS:
- Looking for a Speaker? Visit our Consultant/Speaker Bureau
- Request a Chapter Roster
- Chapter Hosted CHAE / CHTP Review & Exam Form
- Chapter Direct Deposit Form (PDF)
- Creating Scholarship (PDF)
HFTP Website - Chapter Information

• **Chapter Leader Recruitment Toolkit**

  Scroll further down on the Chapter Leader Resource page.

  CHAPTER LEADER RECRUITMENT TOOLKIT

  Please note that HFTP Website login is required to view certain information and links on this webpage, which is specifically designed as resources for our chapter leaders.

  **CHAPTER MEMBERSHIP RECRUITMENT OVERVIEW:**
  - Chapter Membership Recruitment Overview
  - Spring Campaign 17 Chapter Recruitment Overview

  **FLYERS:**
  - Chapter Offer Flyer - contact HFTP Global to update
  - Chapter (1) Page Flyer
  - Chapter Student Offer Flyer

  **EMAILS:**
  - MS Word:
    - Chapter Outreach Email
    - Chapter Email with Offer
    - Chapter Student Outreach Email
    - Chapter Lapsed Member Email with Offer
  - EMAILS - HTML TO BE USED IN EMAIL PROGRAM:
    - Chapter Outreach Email

  **MEMBERSHIP BROCHURES:**
  - Prospective Member - Digital
  - Prospective Member - PDF
  - Prospective Student - Digital
  - Prospective Student - PDF

  For print brochures, please email chapteradmin@hftp.org.

  **VIDEOS:**
  - Full Membership Video
  - Entry Level Membership Video
  - Higher Level Membership Video
Where is the Chapter Leader Submission Center Located?
End of Year Reporting Requirements
Chapters must agree and complete the following yearly requirements in order to maintain their affiliated status. The following forms must be submitted annually with all completed yearly affiliation requirements by December 31.

1. HFTP CHAPTER AFFILIATION AGREEMENT FORM
2. CHAPTER AFFILIATION ACKNOWLEDGEMENT RECEIPT FORM
3. CHAPTER MANAGEMENT PLAN SUBMISSION FORM
4. HFTP CHAPTER AFFILIATION CHECKLIST FORM
   a. Chapter Bylaws
   b. The Chapter’s Management Plan
   c. End of Year Financials
   d. 990/9900N
   e. Insurance certificates (optional)
5. CHAPTER ACTION PLAN FORM
6. HFTP CHAPTER FUNDING CHECKLIST FORM
7. HFTP CHAPTER WEBSITE POLICY FORM
8. SPECIAL RESERVES AUTHORIZATION FORM (ONLY IF NEEDED)
9. CHAPTER LEADERSHIP REPORTING FORM

Additional Requests & Submission Forms

CHAPTER LEADERSHIP SUBMISSION FORM
HFTP CHAPTER QUARTERLY REPORT SUBMISSION FORM
Community@HFTP

- All Chapter Leaders have access to the Chapter Leadership Community Group
- All chapters are eligible for a private chapter community on the Community@HFTP platform, at the request of the Chapter
Chapter of the Year Award Winning Chapter Panel Representatives
Our Panel

From left to right:

Shelley Hooey, Director of Finance and Business Support, Fairmont Palliser.
➢ Southern Alberta Chapter President & Tier A 2017 Chapter of the Year

Sharon Litchfield, CHAE, Controller, Laurel Oak Country Club.
➢ Florida Manasota Chapter Vice President & Tier B 2017 Chapter of the Year

Nasir Naseer, Director of Finance, Holiday Inn Resort Orlando Suites – Waterpark
➢ Mid-Florida Chapter President & Tier C 2017 Chapter of the Year
Question Time With The CEO

Frank Wolfe, CEO, Hospitality Financial and Technology Professionals (HFTP)
Thank You For Attending

Enjoy the Reception