



## AMERICAN SOCIETY OF PROFESSIONAL ESTIMATORS

**Date:**

**To:**

**From:**

**Re: QUARTERLY CHAPTER REPORT**

for the period (check one)  FALL  SPRING  CONVENTION of fiscal  
year \_\_\_\_\_

**Page:** 1 of 5

### AMERICAN SOCIETY OF PROFESSIONAL ESTIMATORS Chapter Quarterly Report

#### PART ONE - IDENTIFICATION

**1. Chapter Name:**

**2. Chapter Number:**

**3. Name and Title of the Preparer of this Report:**

#### PART TWO - MEMBERSHIP

**1. Current Membership Counts (from most recent SBO monthly report):**

Estimator	_____
Certified Professional Estimator	_____
Fellow	_____
Constructor	_____
Associate Member	_____
Affiliate Member	_____
Student Member	_____
Member Emeritus	_____
Honorary Member	_____

**2. Change from Last Report:** \_\_\_\_\_

**3. Total Membership Goal for Current Fiscal Year** \_\_\_\_\_

#### PART THREE – FINANCES and ADMINISTRATION

**1. Financial Condition of Chapter:**

(please check one)  excellent  good  fair  poor

**2. Does the chapter have a current bank account?**  Yes  No

3. Does the SBO have your bank account information (bank RTN and account number) on file? Yes No

4. Is the chapter incorporated in the state in which it is based? Yes No

5. Does the chapter have an IRS tax exempt status? Yes No

6. If yes on 5 above, is it 501c3, 501c6, or both?

7. If yes on 5 above, is it on file at the SBO? Yes No

8. If no on 2-5 above, what is the goal for getting these items to a yes answer? Please explain giving dates, goals, or an update on the status of achieving these tasks. Who is responsible for these tasks within the chapter?

#### PART FOUR – CHAPTER ACTIVITIES

1. Please list your upcoming meeting dates and locations and programs/topics (at least for the next three months)

2. Please list other chapter, regional or construction related events of interest in your chapter area

3. Is the chapter planning any seminars or educational events? Yes No  
If yes please list

4. Has your chapter had any recent extremely successful meetings? Yes No  
If so, what was the topic and who was the speaker?

5. What are your recent chapter achievements and successes or personal chapter member achievements? (such as certification, service pins, ME status, etc) please list them

6. Does the chapter have any purely social or fundraising activities planned? Yes No  
If yes please list

#### PART FIVE – CHAPTER COMMUNICATIONS

1. Do you have a chapter newsletter? Yes No

If yes, list name of the newsletter and how often published and method of publishing.

If yes, how do you fund the newsletters publication?

If yes, do you include content relevant to technical estimating topics? – please explain

If yes, do you include content about ASPE's Canons of Ethics? – please explain

If yes, do you include content about ASPE's Certification program? – please explain

If yes, do you include content about ASPE's Educational opportunities? – please explain

If yes, do you include content about ASPE's Standards Estimating Practices Manual? – please explain

**2. Do you have a chapter website?** Yes No

If yes, please provide the current website address.

If yes, how do you fund the website?

If yes, have you recently asked the SBO to review your website for up to date links and current ASPE information?

If yes, do you include content about ASPE's Canons of Ethics? – please explain

If yes, do you include content about ASPE's Certification program? – please explain

If yes, do you include content about ASPE's Educational opportunities? – please explain

If yes, do you include content about ASPE's Standards Estimating Practices Manual? – please explain

**3. Does the chapter maintain a database of current and past members?** Yes No

If yes, please explain who is the keeper of the database and how it is used

**4. Does the chapter maintain a database of potential members?** Yes No

If yes, please explain who is the keeper of the database and how it is used

## **PART SIX – CERTIFICATION**

**1. Does the chapter have a certification committee to assist members in the pursuit of certification?** Yes No

If yes, please list the chair's name

**2. What percentage of your membership is certified?**

## **PART SEVEN – MEMBERSHIP DEVELOPMENT and OUTREACH**

**1. Does the chapter have a formal method including or inviting Members at Large (MALs) to their events and activities?** Yes No

If yes please explain

**2. Does the chapter have a formal method of including or inviting current non member potential members, or previous (non renewed) members to their events and activities?**

Yes No

If yes please explain

**3. Does the chapter have a formal method of including or inviting the membership of other trade associations to their events and activities, or to conduct a joint meeting? These include associations such as NAWIC, CSI, ASA, AGC, SMPS, ABC, AACE**

Yes No

If yes please explain

## **PART EIGHT – EDUCATION**

**1. Does the chapter have a formal method of selecting chapter meetings topics and speakers?** Yes No

If yes please explain

**2. Does the chapter have members who serve as speakers or presenters at non ASPE construction related events?** Yes No

If yes please explain

**3. Does the chapter have members who serve as instructors or teachers at educational programs hosted by academic institutions or trade associations?** Yes No

If yes please explain

**4. Does the chapter plan to (or has done so already this fiscal year) made a donation to a scholarship program at a college or university, or make a contribution to the ASPE national scholarship fund?** Yes No

If yes please explain

**5. Does the chapter promote to its members and the local construction industry the online classroom educational opportunities that ASPE makes available?** Yes No

If yes please explain

## **PART NINE – REGIONAL AND NATIONAL ACTIVITIES**

**1. Did the chapter have representation at the regional meetings so far this fiscal year?**

Yes No

If yes please explain

**2. Does the chapter have plans to have a delegate attend this year's convention?**

Yes No

If yes please explain

**3. Does the chapter include in its budget and annual activities any funds and fundraising to allow its members to attend the regional meetings and national convention?**

Yes No

If yes please explain

**4. Are any chapter members serving on national committees or on the BOT?**

Yes No

If yes please explain

**5. Have any chapter members contributed content to *Estimating Today*?**

Yes No

If yes please explain

## **PART TEN - AWARDS**

**1. Is the chapter planning to submit for any national awards this year?** Yes No

If yes, which awards?

If no, why not?

If yes, does the chapter have a planning meeting at the start of the fiscal year to plan your activities to align with the awards guidelines?

**2. Does the chapter leadership understand that the awards guidelines are not intended solely to provide an opportunity to win an award, but to provide criteria and goals for chapter activities and events, with the intent being to provide for meaningful membership experiences for their members?** Yes No

## **PART ELEVEN – INTERACTION with ASPE National**

**1. How can the Society Business Office, Executive Director, your Regional Governor, or the Board of Trustees assist your chapter?**

**2. Please list any item you would like to see on the Regional Website or the National Website:**

**3. Please list any items you would like to see in the Society Publications:**