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|  | **2025 CFMA Chapter Benchmarking & Awards Scoring** |
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| **A logo for a company  Description automatically generated** | These questions are being asked of CFMA’s **Fiscal 2025 (April 1, 2024-March 31, 2025).**Please provide answers for this period only. |
|  |  | ***Chapter total score*** | **0** |
|  |  | *Total points achieved through chapter submission* | 0 |
|  |  | *Total points awarded by CFMA HQ* | 0 |
|  | **A single event, program, or meeting may only receive points once even if the event, program, or meeting meets the criteria for an additional area.** |  |
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|  |  |  | *Available Points* | *Points Earned* |
|  | ***Membership/Operations*** |
| 1 | Please list all chapter meetings/events held by your chapter between April 1, 2024 and March 31, 2025 and enter CPE provided (if applicable). The listing of acceptable events are below (Peer Group meetings, or Committee meetings should not be included). \*Complete descriptions needed for points to be awarded\** Formal Member or Executive (not a member) Recognition Program (can only be entered once)
* Chapter member meeting (not peer group/committee)
* Social/Networking events
* Chapter board meeting (not committee)
* Event focused on increasing chapter membership
* Educational course/seminar/training session *(not a CFMA course)*
* Co-sponsored Event with other CFMA chapters
* Co-sponsored Event with other professional associations (ABC, AGC, NAWIC, etc.)
* Raised funds for, or provided service for, a charitable/service organization *(not including scholarships)*
* Exhibit/Booth at a Trade Show
 | Meetings/events — 4 points each |   |
| Date | Type of Meeting | Details | CPE |  |  |
|  |  |  |  |
| 2 | What was the average percentage of member attendance at chapter meetings? | Over 40% — 4 points25% to 40% — 2 points |   |
| 3 | Having events listed on your chapter website shows website visitors that you are an active chapter. Does your chapter list their events on your chapter website?We do not have events listed on our chapter website. | Yes - 2 points |  |
| No – 0 points |
| 4 | Recognizing new members at your chapter meetings is a part of your onboarding process. Describe how new members are being recognized at chapter meetings. We do not recognize new members at chapter meetings. | Yes - 2 points |  |
| No – 0 points |
| 5 | Having a strategic planning session is an important part of boosting your chapter’s overall health. What was the date of your chapter’s last strategic planning session?We did not have a strategic planning session for our chapter. | Since 4/1/2023 — 6 points |  |
| No – 0 points |
| 6 | Updating your chapter’s by-laws, and providing a copy to HQ, protects your members, ensures chapter structure, defines roles and responsibility, establishes procedures and serves as legal guidelines. Does HQ have a copy of your chapter’s current by-laws?We have not sent a copy of our chapter’s by-laws to HQ. | Yes - 2 points |  |
| No – 0 points |
| 7 | Your chapter’s general vs. associate ratio should be reviewed regularly. CFMA’s best practice ratio is 60/40. It can be helpful to consider your current ratio when developing your new member recruitment plans. Please state when the board last reviewed your ratio. We do not review our general vs. associate ratio. | Yes - 2 points |  |
| No – 0 points |
| 8 | Does your chapter have at least one Membership Committee member who is NOT a board member/officer? List name. | Yes - 2 points |  |
| 9 | Does your chapter have at least one Program Committee member who is NOT a board member/officer? List name. | Yes - 2 points |  |
| 10 | Following up with members who do not renew is a part of your member retention policy. Please list how you follow-up with members who have not renewed their membership?We do not follow up with members who are not renewing, or have cancelled, their membership. | Yes - 4 points |  |
| No – 0 points |
| 11 | Please list how you follow up with non-members who attend your events.We do not follow-up with non-members who attend our events. | Yes - 2 points |  |
| No – 0 points |
| 12 | Having a succession plan in place is an important part of ensuring the on-going health of your chapter and should be reviewed yearly. Does your chapter have a succession plan in place that is on track for the upcoming year?We do not have a succession plan in place. | Yes - 4 points |  |
| No – 0 points |
| 13 | Does the chapter have a term length of 2 years or less for all chapter officers? | Yes – 4 points |   |
| 14 | What actions has your chapter implemented to retain and grow members this year? \*REQUIRED for points\* If email or phone call, provide what information was provided. | 4 points |   |
| *Provide a description of the actions your chapter has implemented:* |  |
| 15 | Other than recognition at chapter meetings, what are you doing to make your new members feel welcome at your chapter? Select one. |  |   |
| *If ONLY phone* *calls/emails, list details on what information is conveyed:* |  | 2 points |
| *If more than phone calls/emails, provide a description of your onboarding process:* |  | 4 points |
|  | ***Total Membership/Operations & Education Points*** | **0** |
|  |  |
|  | ***CFMA Initiatives*** |
| 16 | Did the chapter offer events or incentives for CCIFP certification? | 5 points  |   |
| *Please provide date and description of event/incentive:* |  |
| 17 | Has the chapter facilitated a CCIFP study group this year? | 5 points |   |
| *Date(s):* |   |
| 18 | Has the chapter had an event focusing on Diversity, Equity & Inclusion (DEI) this year? | 5 points  |   |
| *Please provide date and description of event:* |  |
| 19 | Has the chapter had an event focusing on CFMA’s Suicide Prevention & Mental Health this year? | 5 points  |   |
| *Please provide date and description of event:* |  |
|  | ***Total CFMA Initiatives Points*** | **0** |
|  | ***Scholarships/Incentives*** |
| 20 | Total value of student scholarships/endowments awarded this year? | Over $10,000 — 15 points $5,001-$10,000 — 10 points$2,001-$5,000 — 6 pointsUp to $2,000 — 4 points |   |
| *Please provide date, description, amount of each scholarship/endowment, and name of person/school receiving it:* |  |
| 21 | Did the chapter spend funds/pay out funds this year for member incentives or member education (CFMA’s Annual Conference & Exhibition, CFMA Regional Conferences, CFM Academy, etc.)? This should be an established member program. *Note: This should not include CCIFP funds (see question 16)*.  | 2 points each(maximum 8 points)  |   |
| *Please provide awarded date, description of scholarship, amount of each scholarship, and name of person receiving it:* |  |
| 22 | Other than scholarships, did the chapter have programs for students (internships, mentoring, etc.)? | 4 points  |   |
| *Description/Date of each:* |  |
|  | ***Total Scholarships Points*** | **0** |
|  | ***Marketing/Public Relations*** |
| 23 | Did members of the chapter participate in a joint Regional Conference Planning Committee? | 1 point each (maximum of 4 points) |   |
| *Name(s):* |   |
| 24 | Does your chapter distribute a chapter newsletter or post a newsletter on your chapter website? | 2 points |   |
| Website link to newsletter: |  |
| 25 | Please list your social media links if your chapter has the following social media accounts and list how often you are posting on each of the platforms. Points will only be provided if the platforms are being actively used (at least 2 posts/month for each).  Social Media Links Posting frequency | 2 points each |   |
| *\*both links and posting frequency are REQUIRED for points\**  | LinkedIn – Facebook – Twitter/X – YouTube –  |   |
| 26 | Does your chapter have an annual general Sponsorship Program in support of your chapter? (for the chapter as a whole not for one specific event).Please provide a brief description of your sponsorship program(s).Do you do anything in lieu of a sponsorship program? |  |  |
| 1 point |
| Yes - 1 point |
|  | ***Total Marketing/Public Relations Points*** | **0** |

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|  | ***This section will be completed by CFMA HQ.******Your chapter is not being asked to collect and submit this information.*** |
|  |  |  |  |  |
|  |   | ***Total Points Awarded by CFMA Headquarters*** | **0** |
|  |  |  |   |   |
|  |  |  | *Available Points* | *Points**Earned* |
|  | ***CFMA Participation*** |
| 101 | Does your chapter have a CFMA National Officer? | 5 points |   |
| *Name:* |  |
| 102 | Do any of your chapter members serve on CFMA’s Executive Committee? | 4 points each |   |
| *Name(s):* |  |
| 103 | Are any chapter members serving as a CFMA National Committee Chair or a CFMA National Task Force Chair? | 3 points each |   |
| *Name(s):* |  |
| 104 | Are any chapter members serving on a CFMA National Committee or Task Force? (If a member participates on multiple committees/task forces, 2 points are awarded for each.) | 2 points each |   |
| *Number of members serving:* |  |
| 105 | How many committees does your chapter have? | 1 point each |   |
| *Number of committees:* |   |
| 106 | Did someone from your chapter participate in a quarterly Chapter Connection Program call? (Points awarded for attendance on a call; additional points are not given for multiple chapter members on a call.) | 3 points for each call |   |
| *Number of calls:* |  |
| 107 | Did someone from your chapter participate in the monthly Chapter Leader Check-in calls? (Points awarded for attendance on a call; additional points are not given for multiple chapter members on a call)?  | 1-3 calls — 1 point4-6 calls — 2 points7-9 calls — 3 points10-12 calls – 4 points13-15 calls – 5 points16-18 calls – 6 points |  |
| *Number of calls:* |  |
| 108 | Did members of the chapter attend Chapter Summit at CFMA’s 2024 Annual Conference & Exhibition? | 5 points per attendee (maximum of 10 points) |   |
| 109 | Does the chapter have a paid chapter administrator?  | 2 points |  |
| Name: |  |
| 110 | Did someone from the chapter attend CFMA at Spring Creek in 2024? | 8 points per attendee |   |
| 111 | How many members of the chapter attended CFMA’s 2024 Annual Conference & Exhibition? (points are awarded for *percentage* of membership attending) | 15% or more — 8 points10% to 14% — 6 points5% to 9% — 4 pointsup to 4% — 2 points |   |
| 112 | Has the chapter received funds through the Corpay affinity program this year? | 3 points |   |
| 113 | Did the chapter use all 2024-25 STAR Program funds? | 5 points |   |
| 114 | Was the Chapter Affiliation Agreement submitted on time (by 6/30/24)? | 5 points |   |
| 115 | Did the chapter submit their 2024-25 Officer/Board/Committee Chair information by the deadline of 3/31/24? | 2 points |   |
| 116 | Is anyone from the chapter participating in the CFMA Emerging Leaders Program? | 2 points each |   |
| *Name(s):* |  |
| 117 | Is the chapter participating in the CFMA Chapter-to-Chapter Support Program?  | 5 points |  |
|  | ***Total CFMA Participation Points*** | **0** |
|  |   |   |   |   |
|  | ***Membership*** |
| 118 | What is the chapter’s on-time renewal rate? (Renewal rate on 3/31/25) | 90% or more — 8 points80% to 90% — 6 points75% to 79% — 4 points70% to 74% — 2 points |   |
| 119 | What is the chapter’s percentage of General Members on 3/31/25? | 60% or more — 6 points55% to 59% — 4 points50% to 54% — 2 points49% or less – minus 4 points |   |
| 120 | What was the chapter’s membership growth rate from 4/1/24 to 3/31/25? | 15% or more — 8 points10% to 14% — 6 points5% to 9% — 4 pointsup to 4% — 2 points |   |
| 121 | Did someone in the chapter win a Hahn Award, Quigley Award, Danny Parrish Leadership Award, or Chair’s Award this year? | 5 points each |   |
|  | ***Total Membership Points*** | **0** |
|  |  |  |  |  |
|  | ***Education*** |
| 122 | Did the chapter present a CFMA education course (e.g., The Basics of Construction Accounting Workshop, *excluding the CCIFP Overview Seminar)?* | 6 points each |   |
|  | *Date/Title:* |   |
| 123 | What was the average percentage of chapter members attending CFMA webinars throughout the year? | 20% or more — 8 points15% to 19% — 6 points10% to 14% — 4 points5% to 9% — 2 points |   |
| 124 | Has anyone in the chapter done a “Hey CFMA” Video? | 4 points |  |
|  | ***Total Education Points*** | **0** |
|  |   |   |  |   |
|  | ***Marketing/Public Relations*** |
| 125 | Did the chapter participate in a CFMA Regional Conference? | 6 points |   |
| *Name of Regional Conference:* |   |
| 126 | Is the chapter’s website up to date? (Current officers, board members, events, etc.) | Yes — 4 points |   |
| 127 | Have any members of the chapter published an article in *CFMA Building Profits* this year*?* | 5 points each |   |
| *Name of member(s):* |   |
| 128 | Does the chapter submit meeting notices for the What’s Happening email. | 3 points |   |
| 129 | Has the chapter identified a CFMA Suicide Prevention & Mental Health Chapter Champion?  | 5 points |  |
| *Name:* |  |
| 130 | Did the CFMA Suicide Prevention & Mental Health Chapter Champion participate in the scheduled calls?  | 75% to 100% — 4 points50% to 74% — 2 points |  |
|  | ***Total Marketing/Public Relations Points*** | **0** |
|  |   |   |  |   |
|  |  |
|  | ***Certification*** |
| 131 | Does your chapter have a Certification Officer? | 5 points |   |
| *Name:* |  |
| 132 | Do any of your chapter members serve on the Certification Board of Trustees? | 4 points each |   |
| *Name(s):* |  |
| 133 | Are any chapter members serving as a Certification Committee Chair or Task Force Chair? | 3 points each |   |
| *Name(s):* |  |
| 134 | Are any chapter members serving on a Certification Committee or Task Force? | 2 points each |   |
| *Name(s):* |  |
| 135 | Has the chapter hosted a CCIFP Overview Seminar this year? | 4 points |   |
| *Date:* |   |
| 136 | Has the chapter identified a CCIFP Chapter Champion?  | 5 points |  |
| *Name:* |  |
| 137 | Did the CCIFP Chapter Champion participate in the scheduled calls?  | 75% to 100% — 4 points50% to 74% — 2 points |  |
| 138 | How many chapter officers and board members are CCIFPs? | 2 points each |   |
| *Number of board members:* |   |
| 139 | What is the percentage of chapter members who are CCIFPs on 3/31/25? | 25% or more — 8 points17% to 24% — 6 points11% to 16% — 4 points5% to 10% — 2 points |   |
| 140 | What was the increase in percentage of number of CCIFPs over last year? | 5% or more — 6 points3% to 4% — 4 pointsUp to 2% — 2 points |   |
|  | ***Total Certification Points*** | **0** |