



DUAL MEMBERSHIP **RELEASE**

ONE TRANSACTION. DUAL MEMBERSHIP.

Your complete guide with information, onboarding and ongoing management for combining local and national SHRM membership.



We are delighted to introduce you to the Dual Membership Release (DMR) guidebook.

This comprehensive document is designed to support you in your role as chapter volunteer leaders interested in participating in the DMR program by ultimately enabling you to focus more on what truly matters—engaging with and supporting your chapter members, or, to put it another way, focusing on “Mission versus Minutiae.”

Whether you are a seasoned volunteer leader or new to the role, this will be your go-to resource for navigating the DMR program successfully. The content is divided into three sections to help you accomplish the following:

- 01** A comprehensive overview that will help you understand the DMR program as a whole and how it can benefit your chapter and members.
- 02** An onboarding manual to the program with instructions and resources to help transition your chapter leadership team through the process of joining the DMR program.
- 03** A review of ongoing administrative management outlining the continuing efforts and best management practices that you and future volunteer leaders will need to be aware of to maximize the program benefits for your chapter.

We believe that the DMR program will not only streamline membership processes but also strengthen the bond between your chapter and SHRM. Together, we can continue to create a vibrant, inclusive and supportive community of HR professionals who are dedicated to advancing their profession.

Thank you for your unwavering commitment to our shared mission. We look forward to embarking on this journey together and supporting you every step of the way.

Sincerely,



READY TO GET STARTED?

Contact your [SHRM Members & Community Director](#)

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PART 1:

EVERYTHING YOU NEED TO KNOW ABOUT THE DMR

Unlock HR Excellence Locally and Nationally



WHAT IS THE DMR PROGRAM?

The DMR program is a strategic partnership between SHRM and its affiliate chapters to “go to market together” and grow membership in both SHRM and the chapter by offering a convenient and streamlined way for new and renewing members to maximize the SHRM member value proposition and access resources at both national and local levels.

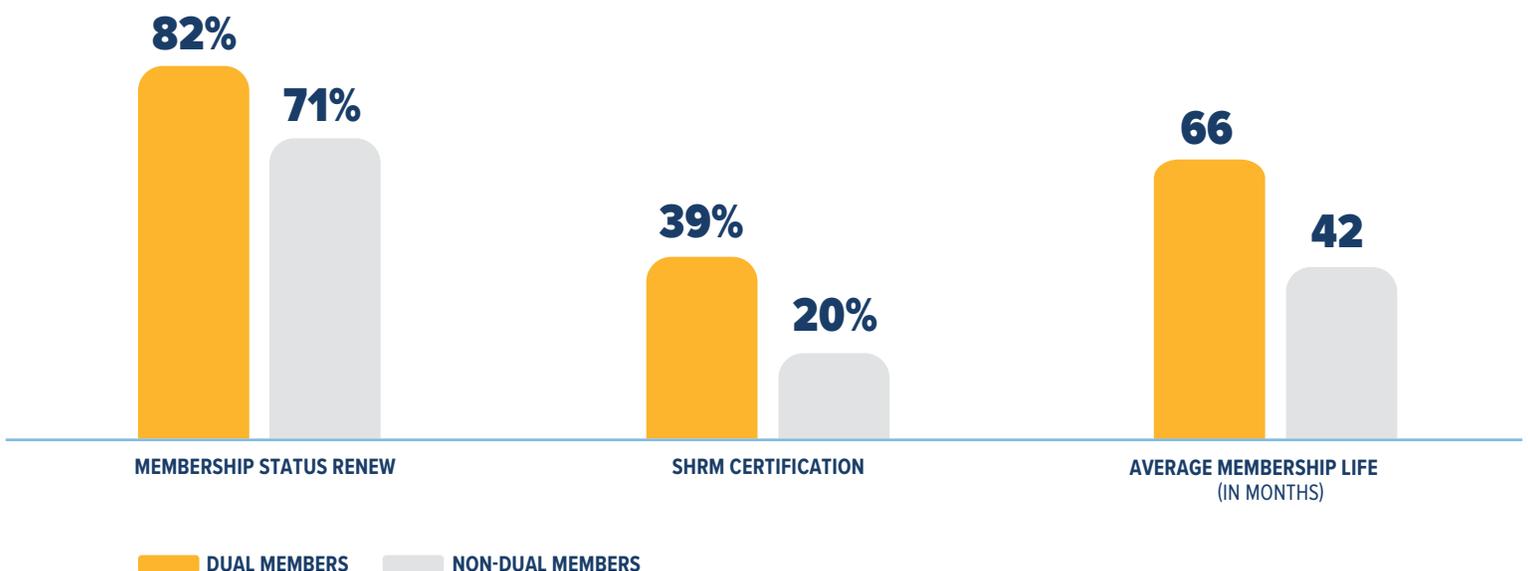
Additionally, the program greatly reduces the administrative burdens of the membership process at the local chapter level, allowing chapter volunteer leaders to focus on “Mission versus Minutiae,” thus further enhancing the member value proposition for local membership.

By leveraging SHRM’s extensive brand recognition and robust marketing capabilities, the DMR program amplifies the chapter’s exposure to HR professional communication and offers a **seamless solution for members to join and renew both their SHRM and chapter memberships in a single transaction** through the SHRMStore.

Chapter members will no longer need to pay separate chapter membership dues directly to the chapter but will instead renew their chapter membership at the same time that they renew their SHRM membership.

KEY ELEMENTS OF THE DMR PROGRAM:

- Supports a strong SHRM affiliate network.
- Grows membership in both the local chapter and SHRM.
- Creates and enhances member lifetime value for both organizations.
- Reduces membership-operations workload for the chapter, allowing chapter leaders to focus on “Mission versus Minutiae.”
- Strengthens the financial foundation of the affiliate chapter.
- Dual members have almost 60% longer Membership Life.



THE PROS OF PARTICIPATING IN THE DMR FOR YOUR CHAPTER



Increases efficiency and consistency of membership administration functions.



Provides an effortless way for new Dual Members to join the chapter and instantly be added to the chapter roster (i.e., they immediately count toward the next Chapter Financial Support Payment [CFSP] payment).



Provides daily reporting on transactions and chapter membership roster and eliminates need for **annual audits**.



Increases **CFSP** from \$10 per existing Dual Member to \$30, and \$0 to \$30 for Local Member Only (LMO) conversions.



Enhances the chapter's **potential for recruiting at-large members** by leveraging SHRM's robust marketing engine, including synchronized membership renewal notification for SHRM and Primary chapter membership, and **two Email Marketing eBlasts per quarter**.



Eliminates **credit card transaction fees** for membership purchases and renewals.

This initiative represents a significant milestone in our ongoing commitment to streamlining processes and enhancing the member experience within SHRM and its affiliated chapters.

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WHAT DOES THE DMR MEAN FOR MEMBERS?

Where members once had to navigate confusing separate processes or make separate payments for chapter membership dues, they can now conveniently renew their chapter membership as they renew their SHRM membership, simplifying their experience and helping them remain engaged with your chapter.

Additionally, becoming a member of SHRM offers a multitude of benefits, empowering HR professionals to excel in their careers and contribute to the advancement of the HR field.

DID YOU KNOW?

Individuals with only one membership (due to their company's strict policy) were able to join the DMR program after submitting a single itemized invoice for membership in both organizations. DMR program membership can make it easier for you and your company with one payment.

PROS OF BEING A SHRM MEMBER:



Access Cutting-Edge, Exclusive HR Resources:

Exclusive articles, research reports and publications empower HR professionals to stay current with industry trends and best practices.



Access HR Tools and Templates:

A wide range of customizable HR tools and templates are available to simplify daily tasks, from employee handbooks to performance review forms.



Submit Inquiries to HR Knowledge Advisors:

Receive real-life advice and support for your HR-related questions from a team of certified HR experts.



Advance Your Career:

Access job boards, career resources and a diverse community of professionals.



Expand Your Network:

Connect to a vast network of HR professionals, both locally and globally.



Discover Professional Development Opportunities:

Explore educational events, webinars, and certifications like the SHRM-CP and SHRM-SCP. These certifications and credentials enhance your HR knowledge and marketability.



Receive Legal and Compliance Guidance:

Navigate complex employment laws and regulations with guidance on HR-related legal and compliance issues.



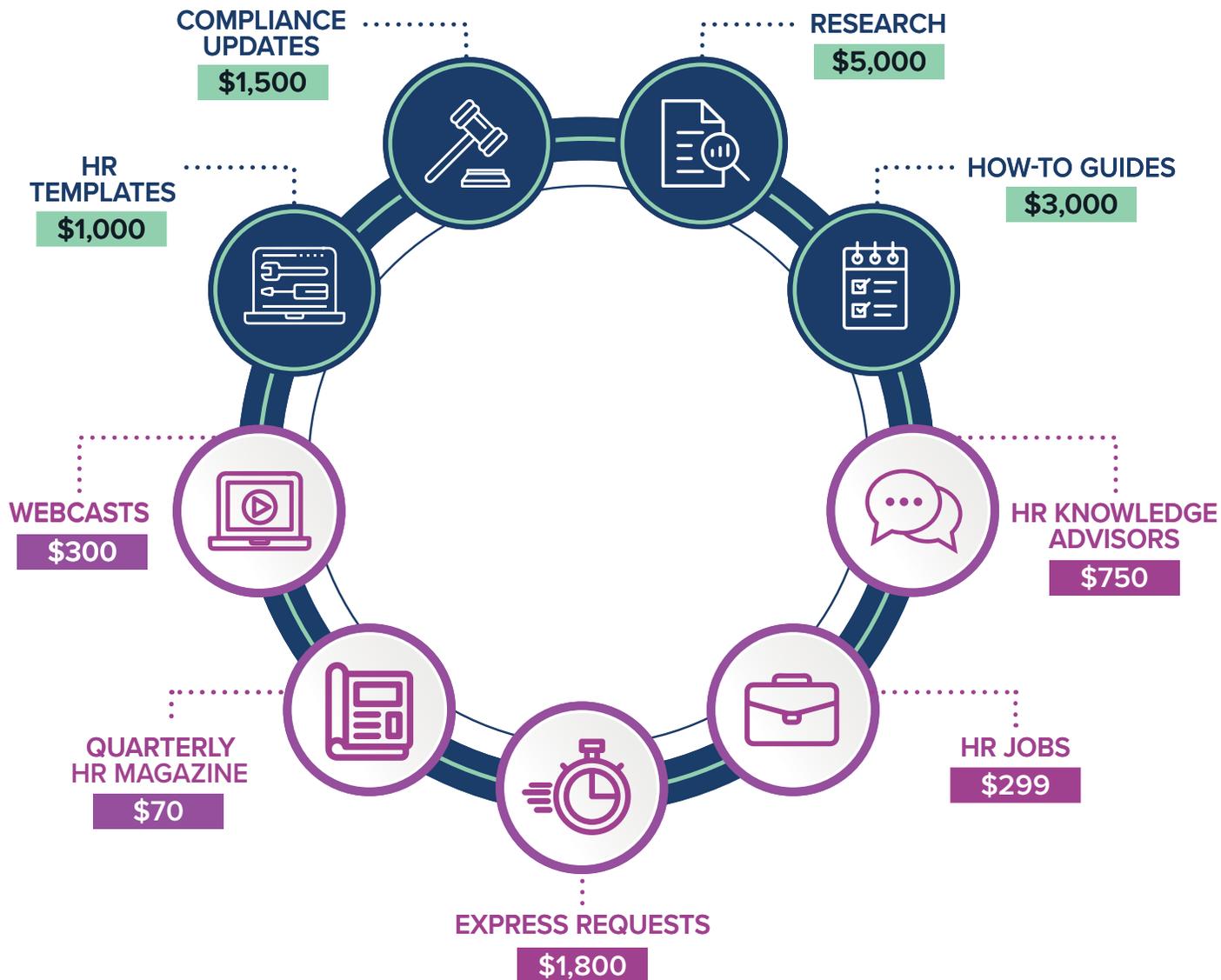
Engage with Your Community:

Actively engage with HR professionals through special interest groups, volunteer opportunities and discussion forums, fostering collaboration and knowledge-sharing.



Get Discounts and Savings:

Receive discounts on conferences, publications and professional development opportunities, helping you maximize your budget while pursuing career development.



Join SHRM to unlock more than \$13,000 worth of HR tools, research and expert guidance to help drive change in the world of work and in your own work.

- Expert, Certified SHRM HR Knowledge Advisors**
 Call, email or chat with SHRM's certified HR Knowledge Advisors for guidance on your most pressing HR questions.
- State and Local Compliance Updates**
 Knowing labor and employment law in general isn't enough. Our resources keep you in the know on compliance within your specific region and state.
- Real-Time Breaking News Alerts**
 Stay on top of emerging workplace issues with SHRM's HR News, offering the critical news, trends and analysis you need as an HR professional.
- 40+ HR Resource Hub Pages**
 Find multiple resources on specialized workplace topics. View key toolkits, policies, research and more on HR topics that matter to you.

WHY BELONG TO SHRM AND A SHRM AFFILIATED CHAPTER?

SHRM MEMBERSHIP:



Download tools and templates



Access expert HR Knowledge Advisors



Remain current with news on trending HR topics



Stay compliant with legal and compliance resources

CHAPTER MEMBERSHIP:



Network with local HR professionals



Gain insights on HR best practices



Discover local career advancement opportunities



Earn PDCs for SHRM-CP or SHRM-SCP recertification



READY TO GET STARTED?

Contact your [SHRM Members & Community Director](#)

WHAT IS REQUIRED FROM YOUR CHAPTER TO JOIN?

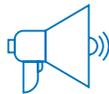
The successful implementation of the DMR program has many benefits. Participation in the program is contingent upon your dedicated effort and commitment.

HERE ARE KEY REQUIREMENTS FOR YOUR CHAPTER'S PARTICIPATION:



Alignment of Membership Renewal Dates:

Your chapter will be required to align the chapter expiration date for current Dual Members with the expiration date for those members' current SHRM memberships, thus synchronizing both memberships to the same renewal cycle. This is a one-time adjustment, and our team will provide assistance to facilitate this process.



Authorization for Membership Sales:

SHRM will serve as the sales conduit for chapter memberships. In order to enable this, chapters must sign a concise two-page licensing agreement authorizing SHRM to actively promote and sell chapter memberships on the chapter's behalf.



Transition to 100% Affiliation Chapter Membership:

Over a period of no more than 24 months following the program's implementation, the chapter must transition to a 100% Affiliation chapter membership model. After joining the DMR program, as LMO chapter memberships approach their expiration date, Dual (SHRM + chapter) membership will be the option for renewal of chapter membership.

***Note:** The DMR program does not place any restrictions on participation in chapter events and activities. The chapter will have full authority to decide how to address "nonmember" participation in chapter activities. Nonmembers may not vote or hold office in the chapter.*

We emphasize that these measures are integral to the successful adoption of the DMR program, which promises substantial benefits for both your chapter and its members. Your cooperation and commitment are pivotal in realizing the full potential of this initiative, and we are here to support you every step of the way.

READY TO GET STARTED?

Contact your [SHRM Members & Community Director](#)

DMR: MYTH VS. FACT

MYTH:

SHRM is going to make joining the DMR program mandatory for all affiliate SHRM chapters.

FACT:

The DMR is a strictly voluntary program, and affiliate SHRM chapters are not required to join.

If our chapter joins the DMR program, we will lose all our local members who are not members of SHRM.

Although participation in the DMR program requires the chapter to transition to a 100% affiliated chapter (within 12 to 24 months), data shows that, on average, more than 50% of LMO members convert to Dual Membership. With the addition of the LMO promotion offer of 50% off the first two years of SHRM membership for converting LMO members, the conversion rate of LMOs has grown much higher.

I am not a member of SHRM, and if my chapter joins the DMR, I will not be able to participate in chapter activities.

The DMR program places no restrictions on who can participate in chapter activities. That decision is entirely up to the chapter, and if a chapter decides to join the DMR program, any current LMO members who choose not to become Dual Members can participate in chapter events as a guest, sponsor, event partner, etc. Again, that decision is entirely up to the chapter.

The DMR program is just another way for SHRM to increase its membership.

The DMR program was developed after years of requests from affiliate chapters and the Membership Advisory Council (MAC) and is designed to grow membership in the local chapter and SHRM. The requests were for a way to purchase both national and local membership at the same time with one transaction.

Our chapter is too small or too big to join the DMR.

The DMR works the same for all chapters regardless of size, and chapters from all size levels are participating in the DMR program.

MYTH:

My chapter cannot join the DMR because we offer multiple membership packages.

FACT:

The DMR program is designed to process join/renewal memberships at a set annual rate and does not support multiple membership packages. However, it does not restrict chapters from offering “add-on” packages to their members (such as discounted rates for conferencing events or pre-payment of monthly chapter meeting fees) that are purchased as a separate transaction(s) directly with the chapter after joining or renewing chapter membership on the SHRM website.

Joining the DMR program doesn't make much difference for chapters that are already 100% chapters.

The two primary DMR program benefits for 100% chapters are increased CFSP (+\$5/Dual Member annually) and purchasing ability/visibility through the SHRMStore.

The DMR program does not benefit my chapter members.

DMR chapters receive additional CFSP funds, which can be used to enrich member benefits. Additionally, members only have to keep track of one renewal date and can pay through a single transaction for their SHRM and local chapter memberships.

Joining the DMR program will change how my chapter's meetings or events operate.

The chapter retains full authority to operate meetings and events as they see fit.



READY TO GET STARTED?

Contact your [SHRM Members & Community Director](#)

PART 2:

ONBOARDING MANUAL

Set Your Chapter and Members Up for Success



The SHRM DMR team welcomes and congratulates you on making this important strategic business decision that will positively impact your chapter’s long-term strength and growth. We look forward to helping you prepare your chapter for launch.

We know you are excited to begin your chapter preparations, and so are we!

GETTING STARTED

- Get prepared with a detailed [chapter preparation schedule and timeline](#).
- Get familiar with the [Glossary of Common Terms](#).

MORE RESOURCES:

Having trouble finding what you need? Refer to the DMR chapter toolkit on the Volunteer Leader Resource Center (VLRC) website.



We’ll be here to provide continuing support after your launch date! Now, let’s get started on what one chapter president described as “the best decision ever!”

PRO TIPS!

While training meetings will be recorded, you’ll greatly benefit from attending these virtual sessions as they’re happening live. This way, you can ask questions and get support in real time!

For a smooth process, be sure to stay on track with chapter prep training meetings and fulfill the benchmarks outlined in the Launch Operational Timeline.

DMR HIGH-LEVEL PROJECT TIMELINE

16 WEEKS OUT

The chapter board reviews the DMR timeline and resources and communicates with the SHRM Members & Community Director and the SHRM Director, Affiliate Operations to review the membership date alignment process and financial considerations for the chapter. With assistance from SHRM staff, the chapter board begins developing a chapter-specific plan for full transition to the DMR and begins developing a Member Communication & Education Campaign.

12 WEEKS OUT

The chapter commits to joining the upcoming DMR launch group.

10-11 WEEKS OUT

The board reviews the DMR web portal to familiarize themselves with the process for adding chapter membership to an existing SHRM membership and the “Dual Membership” process for joining or renewing SHRM and the chapter together. The board then works with the SHRM Members & Community Director and the SHRM Director, Affiliate Operations to initiate an education campaign with LMO members regarding the value of SHRM membership.

8-9 WEEKS OUT

- First chapter prep meeting with SHRM staff:
- Program overview.
 - Chapter preparation timeline review.
 - Review chapter License Agreements.
 - Review DMR web portal and process.
 - Begin the chapter Member Communication Campaign.
-

6-7 WEEKS OUT

- Chapter signs/executes License Agreement.
Chapter sends membership roster to SHRM staff.
Begin prep for two chapter roster audits leading up to release date.
- Continue chapter Member Communication Campaign.
- Second chapter prep meeting with SHRM staff:
- Membership alignment process (SHRM and chapter memberships).
 - LMO conversion and financials.
-

4-5 WEEKS OUT

Third chapter prep meeting with SHRM staff:

- Review chapter Roster Process.
 - Review DMR “Digital Assets” for chapter websites and SHRM Dual Membership portal.
 - Adding chapter membership to existing SHRM membership or joining both SHRM and the chapter (LMOs and New Members).
 - Conduct first chapter roster audit.
 - If applicable, chapter sets membership dues amount (to include 2-year and 3-year pricing discounts) and communicates to SHRM staff.
 - Continue chapter Member Communication Campaign.
-

2-3 WEEKS OUT

Fourth chapter prep meeting with SHRM staff:

- DMR Transaction Reports.
 - Affiliate Management Portal (AMP) review.
 - “Chapter Readiness” review.
 - Continue chapter Member Communication Campaign.
-

1-2 WEEKS OUT

- Conduct second (final) chapter roster audit.
 - Chapter installs DMR Digital Assets to chapter website in draft form for review by SHRM Staff (not applicable for chapters that utilize a SHRM-hosted website).
-

1 WEEK OUT

- “Final” chapter Roster Review with chapter (optional).
 - Review of DMR Digital Assets on chapter with SHRM staff.
 - Continue chapter Member Communication Campaign.
-

LAUNCH DAY

- Activate DMR Digital Assets and URL link on the chapter website.
 - **Go Live! Celebrate!**
-

AFTER LAUNCH DAY

- Post-launch follow-up meetings.
 - Continuing chapter Member Communication Campaign.
-

EXAMPLE DMR LAUNCH OPERATIONAL TIMELINE

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
LAUNCH MINUS 12 WEEKS:		CHAPTER COMMIT DATE FOR JOINING DMR LAUNCH				
LAUNCH MINUS 10 WEEKS:	DMR INTRO & PREP MEETING #1 Project Timeline Review – 1 hr					
LAUNCH MINUS 9 WEEKS:	CHAPTER BEGINS MEMBERSHIP COMMUNICATION CAMPAIGN (CAN BEGIN EARLIER) SHRM SENDS LICENSE AGREEMENT FOR REVIEW					
LAUNCH MINUS 8 WEEKS:	PREP MEETING #2 Membership Alignment – 1 hr					
LAUNCH MINUS 7 WEEKS:	*OPTIONAL: DUES ALIGNMENT EXERCISE. THE CHAPTER PROVIDES ROSTER AND EXPIRATION DATES					
LAUNCH MINUS 6 WEEKS:	CHAPTER EXECUTES LICENSE AGREEMENT					
LAUNCH MINUS 5 WEEKS:	PROVIDE DMR WEBLINK & DIGITAL ASSETS TO CHAPTERS					
LAUNCH MINUS 4 WEEKS:	PREP MEETING #3 Roster Audit Process & Digital Assets – 1 hr		1 ST CHAPTER ROSTER DUE		PREP MEETING #4 AMP Roster, DMR Reports, & Chapter Readiness – 1 hr	
			2 ND CHAPTER ROSTER DUE *Optional "Final" Chapter Roster Review with Chapter – 20 min		WEBSITE REVIEW 15 min per chapter	
	★ DMR LAUNCH DAY ★ "Go Live" in the Morning			*POST-LAUNCH MEETING #1 Optional Q&A Session		
				*POST-LAUNCH MEETING #2 Optional Q&A Session		

**All meetings are from 3 p.m. to 4 p.m. Eastern Time (unless otherwise noted).*

STEP-BY-STEP ONBOARDING PROCESS

STEP 1: DEVELOP A CHAPTER MEMBERSHIP COMMUNICATION PLAN

Develop a communication plan to inform your chapter members. Be sure to include the following:

- “WHAT” the DMR program is.
- “WHY” your chapter board has decided to make this strategic move for the chapter.
- “WHEN” the chapter will join the DMR.
- “WHAT” this change means for them as a member (Dual Members and LMO).
- “WHO” your members should direct questions to.

MORE RESOURCES:

Get organized from the start by using our Project Plan Template.



STEP 2: PREPARE YOUR CHAPTER WEBSITE

It will be the chapter’s responsibility to ensure that all applicable updates to the chapter Membership Join/Renew webpage are completed prior to the DMR launch date.

DMR Digital Assets/URL links should be kept in “Draft” form and not posted to the chapter website prior to the morning of the DMR launch date, because they will not function in the SHRMStore until that date.

[View a sample DMR chapter Membership Join/Renew webpage.](#)

Note: If your chapter utilizes a SHRM-hosted chapter website, these changes will be made for you by SHRM staff.

PRO TIPS!

Make a schedule to define how often you’ll communicate with your members. Staying consistent about communications keeps your members up-to-date and creates a sense of transparency.

Create a chapter leadership team for the DMR transition. Many hands make light work! Get as many chapter volunteer leaders as possible in the process.

FRIENDLY REMINDER!

You are responsible for your chapter Membership Communications Campaign, which will give your members key information about transitioning into the DMR.

STEP 3: CONDUCT YOUR CHAPTER PRE-LAUNCH ROSTER AUDITS

Two audits will be done to make sure that both SHRM and the chapter are in agreement that the roster is correct (for both Dual Members and LMOs) prior to the “Go Live” date.

- A SHRM Member Engagement Specialist (MES) will contact the chapter to request a copy of the chapter’s most up-to-date roster showing both Dual Members and LMO members.
- The MES will conduct a standard roster audit verifying that all Dual Members listed are active SHRM members and coded to the chapter roster (as Primary or Multi-Member). The MES will also check to see if any LMOs are actually SHRM members that can/should be coded as Dual Members on the chapter roster.
- The chapter will receive the audit results from the MES and will review for any possible discrepancies. The chapter will communicate with members who have expired SHRM memberships, are coded as Primary to another chapter, are not in SHRM’s database as being a SHRM member, etc. The chapter will track results of that communication and update its roster accordingly.
- Approximately 10 days prior to “Go Live,” a second roster audit will be conducted, discrepancies will be corrected, and the results of the second audit will be the live roster or record agreed upon by both SHRM and the chapter. Any discrepancies identified after the release date will be corrected on a case-by-case basis.

STEP 4: ENSURE SHRM & CHAPTER MEMBERSHIP ALIGNMENT

When your chapter launches the DMR program, a chapter membership record, also known as an Affiliate Member Service Record, will be created for each of your current chapter Dual Members. The expiration date of the chapter membership record will be set to the same date as the “Parent” SHRM membership service record.

This aligns both membership records to the same one-, two- or three-year life cycle, and they will then expire on the same date in the future.

During the DMR launch preparation process, the SHRM DMR team will run a Membership Alignment financial report of the chapter’s Dual Membership, which the chapter leadership team will use to determine if and how the chapter may need to invoice or reimburse current chapter Dual Members for any differences (gap or overlap) in the current SHRM and chapter memberships at the time of DMR launch.

If applicable to your chapter, this will be a one-time event associated with the DMR transition process, and it will be the last time the chapter needs to invoice a member directly for membership dues. See example on the next page.

Rock Star SHRM

8/5/22 Dual Member Roster

Annual Chapter Dues: \$60.00

- SHRM membership expires BEFORE Chapter membership:** Chapter members who will need to renew their SHRM membership before their current Chapter membership expires will be charged for a full year of Chapter membership through the DMR website, and the Chapter will need to reimburse those members for any overpayment.
- SHRM membership expires AFTER Chapter membership:** Chapter members whose SHRM membership will expire after their current Chapter membership expires will need to be billed by the Chapter at a prorated amount to cover the "gap" between when their chapter membership expires and when they renew their SHRM membership. When it is time to renew their SHRM membership, the member will be able to renew both memberships (SHRM and Chapter) at the same time for one, two or three years.
- This member's SHRM membership does not expire for more than one year:** These Chapter members will need to be billed by the Chapter at a prorated amount to cover the "gap" between when their chapter membership expires and when they renew their SHRM membership. It will be important to make them aware that they will be charged for Chapter membership on a prorated basis based on the number of months remaining on their current SHRM membership, which will be more than one year of Chapter dues.
When it is time to renew their SHRM membership, the member will be able to renew both memberships (SHRM and Chapter) at the same time for one, two or three years.

* **Negative** numbers indicate overpayment of chapter dues at time of SHRM membership renewal (i.e., SHRM membership expires first); **positive** numbers indicate underpayment of chapter dues at time of SHRM membership renewal (i.e., Chapter membership expires first).

Note: The formulas in the first 10 table rows of columns G and H are locked to protect the formulas. When adding additional rows to worksheet, make sure to copy the formulas in Columns G and H.

Chapter Number	Primary/Multi Member	First Name	Last Name	SHRM Membership Expiration Date	Chapter Membership Expiration Date	Chapter vs. SHRM Membership Term Difference (months)	Chapter Dues Difference Estimate*
0040	Primary	Mick	Jagger	3/31/2023	8/9/2022	8	\$ 40.00
0040	Primary	Joan	Jett	4/30/2023	10/9/22	7	\$ 35.00
0040	Primary	Eric	Clapton	4/30/2023	4/28/2023	0	\$ -
0040	Primary	Paul	McCartney	10/31/2024	9/28/22	25	\$ 125.00
0040	Primary	Stevie	Nicks	3/31/2023	11/13/22	5	\$ 25.00
0040	Primary	Jimmy	Buffet	6/30/2023	12/7/22	7	\$ 35.00
0040	Multi	Bruce	Springsteen	11/30/2022	8/6/23	-8	\$ (40.00)
0040	Primary	Sheryl	Crow	10/31/2022	6/9/23	-7	\$ (35.00)
0040	Primary	Jon	Bon Jovi	2/28/2023	12/31/2022	2	\$ 10.00
0040	Primary	Elton	John	4/30/2024	5/1/2023	12	\$ 60.00
						0	\$ -
						0	\$ -
						0	\$ -
						0	\$ -
						0	\$ -
						0	\$ -
						0	\$ -
						0	\$ -
						0	\$ -

To collect from members (SHRM membership expires after Chapter Membership) \$ 330.00

To reimburse to members (SHRM membership expires before Chapter Membership) \$ 75.00

STEP 5: TRANSACTION REPORTS

DAILY AND MONTHLY DMR TRANSACTION REPORT RECIPIENTS

Upon preparing for DMR launch, the chapter will send SHRM the email addresses for chapter volunteer leaders who should receive the daily DMR Transition Reports and the monthly Transaction Summary Reports.

DAILY TRANSACTION REPORTS

Each weekday, your chapter will be sent a Transaction Report showing any chapter membership Join or Renew activity for the past 32 days.

MONTHLY TRANSACTION SUMMARY REPORTS

If your chapter charges dues, toward the end of each month (20th-25th), you will receive a Monthly Transaction Summary Report itemizing the amount of chapter dues collected (since the previous month's deposit) and direct deposited into the chapter's bank account.

If your chapter does not collect dues, the daily Transaction Report (\$0 - transaction) will serve as the monthly summary report because it lists all activity for the previous 32 days.

FRIENDLY REMINDER!

All chapters will now be on the AMP and have real-time access to their chapter membership data. [AMP training](#) resources are available on the VLRC website.

PRO TIP!

After launch, the chapter will inform SHRM of updates to chapter reporting recipients by emailing change requests to: shrm.memberrelations@shrm.org



SUNSETTING LMO CHAPTER MEMBERSHIPS

As a part of joining the DMR program, non-100% affiliated chapters must agree to transition to 100% affiliation for SHRM to take over maintaining the chapter's membership records. Additionally:

- Chapter members must also be/become SHRM members.
- The chapter will be given up to 24 months to transition all LMO chapter members to Dual Membership or exit them from chapter membership.
- When the current LMO chapter membership expires, the chapter will communicate a renewal message to the member offering Dual Membership as the only option for chapter membership renewal.
- After a transition period, LMO will no longer exist, and the chapter will officially achieve 100% affiliation.

CHAPTER MEMBERSHIP DUES: COLLECTION

Please keep in mind that the DMR collects membership dues only.

- The DMR supports a fixed rate for chapter membership dues and **does not support special rates or packages**.
- The chapter cannot package seminars/events with membership. However, that chapter can offer such things as "Add-Ons" available directly from the chapter after purchasing a Dual Membership through the SHRM website. Chapters may also choose to include meeting/event fees in the cost of annual chapter membership dues that is set as the singular price option on the DMR website.
- Registration and payment for chapter activities such as meetings, seminars and conferences **must be conducted separately** by the chapter through the chapter website.

CHAPTER MEMBERSHIP DUES: DISBURSEMENT

On or around the 20th of each month, SHRM will direct deposit all membership dues collected since the previous direct deposit to the chapter. If a chapter needs to update their direct deposit information, they can reach out to shrm.memberrelations@shrm.org

The chapter will receive a Monthly Transaction Summary Report itemizing the chapter membership join/renew transactions making up that month's deposit.

PRO TIP!

There are several ways to educate LMO members about the value of a SHRM membership. A SHRM Field Services Director can present to your chapter membership, and you can find sample communication resources available on the [DMR Chapter Tool Kit](#) in the VLRC.

FRIENDLY REMINDERS!

The chapter will receive all rights and benefits of a 100% chapter (including increased CFSP) beginning on their DMR launch day!

Chapters set their own dues and may change them once per calendar year.

PART 3:

ONGOING ADMINISTRATIVE MANAGEMENT

Ensure Smooth DMR Operations



AFFILIATE MANAGEMENT PORTAL (AMP)

The AMP is your chapter's real-time dashboard for:

REPORTS AND ROSTERS

VOLUNTEER LISTS

KEY DOCUMENTS
(CHARTER AND BYLAWS)

For information on how to be granted access to and use the AMP, please visit the [AMP](#) webpage on the VLRC website.

MEMBER COMMUNICATIONS TEMPLATES/EXAMPLES

Available on the [DMR Chapter Tool Kit](#) page on the VLRC website.



TRANSACTIONS OVERVIEW

AUTO-RENEW TRANSACTIONS

Auto-renew transactions are automatically initiated in the SHRM database on the first day of the month of expiration of the current/active SHRM membership.

Example: If the member's Dual Membership expires on July 31, a transaction for auto-renew will occur in the SHRM system on July 1 and will be shown on the Daily Transaction Report the following day.

CREDIT MEMO/REFUND TRANSACTION REPORTS

To make it easier for chapters to view all refunds and cancellations, SHRM will send out DMR Credit Memo reports on the 1st and 15th of each month. If your chapter does not receive a Credit Memo/Refund report on the 1st or 15th of the month, it is because there are no credits/refunds to report at that time.

REFUNDS

Although SHRM has a no-refund policy, exceptions will be made on a case-by-case basis, such as:

- When a member forgets to turn off the auto-renew function on their SHRM membership profile, and after the auto-renew is processed.
- If a member contacts SHRM informing that they retired, left the HR field, are unemployed, etc. and did not intend to renew SHRM (and chapter) membership, or in cases where a company credit card was on file for the auto-renew, and we are contacted by the company requesting a refund because the company no longer employs the individual.

DATABASE MANAGEMENT

It is important to note that the chapter's website and membership database (membership directory, email distribution list, event registration pages, etc.) are completely separate from the SHRM membership database, including SHRM-hosted chapter websites.

The chapter is solely responsible for maintaining and updating chapter membership database records kept in the chapter's website. Depending upon the web-hosting services the chapter uses, such updates can be done manually or via data import.

- [Instruction document](#) for importing new member data and updating renewing member data on a SHRM-hosted chapter website.

DAILY TRANSACTION REPORT

Each weekday, your chapter will be sent a Transaction Report showing any chapter membership join/renew activity for the past 32 days (covering one full month).

MONTHLY TRANSACTION SUMMARY REPORT

If your chapter charges dues, toward the end of each month (20th-25th), you will receive a Monthly Transaction Summary Report itemizing the amount of chapter dues collected (since the previous month's deposit) and direct deposited into the chapter's bank account.

If your chapter does not collect dues, the daily Transaction (\$0 - transaction) will serve as the monthly summary report because it lists all activity for the previous 32 days.

JOIN/RENEW MEMBERSHIP PROCESS

All chapter members (prospective/new/renewing) should be directed to begin the join/renew process via the appropriate DMR weblinks on the chapter [“Join/Renew” webpage](#) and not the general SHRM website.

- A new member to both organizations will automatically have both SHRM and chapter membership records aligned when they join.
- Once the Dual Membership record is created, in the future, when the member receives notifications for renewal of SHRM membership, they will also be prompted to renew chapter membership with their “Primary” DMR chapter.
- **Non-Primary (AKA “Multi-Member”) members** of your chapter will have to manually add chapter membership to their current SHRM membership for each renewal cycle. Additionally, as the SHRM system only sends out chapter renewal reminders for Primary DMR chapter membership, the chapter should monitor non-Primary memberships and send specific renewal reminders to non-Primary chapter members informing/reminding them of the process for renewing their non-Primary chapter membership.

“ADD CHAPTER” MEMBERSHIP PROCESS

When a current SHRM member decides to “add chapter” membership to their existing SHRM membership, here’s how it works:

- **Membership Expiration Alignment:** The expiration date for the chapter membership will be synchronized with the expiration date of the current SHRM membership.
- **Prorated Chapter Dues:** The individual will be charged chapter membership dues on a prorated, monthly basis. The amount will depend on the time remaining on their current SHRM membership.
- **Dual Membership Renewal:** When their membership approaches expiration, they should renew both their SHRM and chapter memberships simultaneously. This renewal process involves a single transaction, referred to as a “Dual” membership renewal.

FRIENDLY REMINDER!

SHRM members can join as many chapters as they wish to. However, only one chapter can be designated as their “Primary” chapter and receive the CFSP for that SHRM member.

DMR chapter membership renewal prompts are only generated for the “Primary” affiliate chapter, so chapters must track and send chapters membership renewal notices/reminders to any non-Primary (AKA “Multi-Member”) chapter members.

DUAL MEMBERSHIP AUTO-RENEW PROCESS

- **Auto-Renew Option:** Unless they have chosen to opt out, Dual Members will experience a seamless auto-renewal process. Both their SHRM and "Primary" DMR chapter memberships will automatically renew at the beginning of the month in which their current memberships expire.
- **Manual Renewal for Non-Auto Renewals:** Dual Members who have chosen to opt out of the auto-renewal option will receive Dual Membership renewal email notifications and will be automatically prompted to renew their Primary DMR chapter membership when they log in to renew their SHRM membership. The member should double-check to ensure that both SHRM and Chapter memberships are in the cart before final checkout.
- **Non-Primary Members (Multi-Members):** Dual Members who are non-Primary members of your chapter (also known as Multi-Members) need to manually add chapter membership to their new SHRM membership after renewal each year. Even if they use the auto-renew feature, it will automatically renew the "Primary" chapter membership only. Therefore, they must take this manual step to maintain their non-Primary chapter membership.

NEW MEMBERSHIP PROCESSES

NEW MEMBER ACTIVATION

1. Use the Transaction Report to identify new chapter members and import their member information into your chapter membership database.
2. Use the same process to update renewing member information if the member has updated their SHRM membership profile and informed you that their chapter member profile should be updated.
3. Once a chapter joins the DMR program, there will no longer be any form of "chapter pre-approval" for the acceptance or activation of chapter membership. Chapter membership will be active upon successful submission of payment in the SHRMStore, so chapters need only to create and activate new member account profiles on the chapter's membership database upon notification of the new chapter member via the daily DMR Transaction Report.

FRIENDLY REMINDER!

The current SHRM membership classification of new, renew, rejoin and winback are specific to the SHRM membership, not the chapter membership.

Example: A SHRM member could be renewing their SHRM membership but also join a chapter for the first time.

SHRM Membership Record Classifications are defined as follows:

New: Joined SHRM for the first time

Renew: Renewed their SHRM membership before (expiration date + 30 days)

Rejoin: Renewed their SHRM membership between (expiration date + 30 days) and (expiration date + 12 months)

Winback: A member who rejoins SHRM more than 12 months after expiration

NEW MEMBER COMMUNICATIONS

Please reach out to new members within three business days to formally welcome them to the chapter. Then, be sure to follow up by:

- Acknowledging their chapter membership.
- Sharing the latest chapter-specific information and any timely updates.

ONGOING CHAPTER MEMBER ENGAGEMENT

The DMR team helps reduce the administrative management “minutiae” of the chapter membership management process; however, it is not a “set it and forget it” auto-pilot system for all chapter membership management functions. Chapters should:

- Continue to regularly communicate with chapter members regarding membership renewal and the new DMR join/renew process for chapter membership. Especially during the first year (standard renewal cycle) of transition after joining the DMR because chapter members are learning and adjusting to a new process.
- Pull a list of all expiring members before the 15th of each month and email those members a renewal reminder from the chapter. You can include a hyperlink to the chapter’s DMR Join/Renew webpage and attach instructions.
- Once per month, remind chapter members to update their SHRM membership profile (if applicable) and report to the chapter board that changes were made so they can update the chapter membership profile accordingly.
- Communicate with renewing chapter members to thank them for renewing and to reaffirm that their membership in the chapter is valued.
- Use the [Email Marketing eBlast](#) to connect with SHRM At-Large members in the chapter’s service area to invite them to connect with the chapter and attend a chapter activity.



MANAGING CHAPTER MEMBERSHIPS EFFECTIVELY

It's crucial to monitor chapter dues payments and the "SHRM Membership Paid Through Date" and "Chapter Paid Through Date" columns, because there may occasionally be a mismatch that will need to be manually corrected by the member or by a SHRM Customer Experience team member.

Here are some common scenarios:

SCENARIO #1

In the DMR launch and the initial six- to 12-month transition period, some chapter members may have pre-paid "pending" SHRM membership renewals on file that were purchased prior to the chapter joining the DMR program, and thus are not pending "Dual" membership renewals. On DMR launch day, new "Dual" chapter membership records are created for the member's "CURRENT/ACTIVE" SHRM and chapter membership, but future "pending" records are unaffected. Thus, unless chapter membership is added to the future "pending" SHRM renewal, the chapter membership will expire at the end of the current active "Dual" membership.

SOLUTION:

Members need to manually add chapter membership to any "pending" future memberships.

SCENARIO #2

Some members may purchase SHRM membership renewals well in advance or buy multiple renewals. When a future renewal is acquired before the current membership expires, it enters a "pending" status and activates upon the current membership's expiration.

SOLUTION:

Members with one or more "pending" SHRM memberships in their account must individually add chapter membership to each "pending" SHRM membership by repeating the "Add Chapter to Existing Membership" process. If the member has multiple SHRM membership renewals in "pending" status, following the aforementioned steps will add chapter membership to each "pending" SHRM membership in chronological order of the "pending" start date of that membership.

SCENARIO #3

A member with only a few months remaining on their current SHRM membership may have a “pending” SHRM membership on file when they use the “Add Chapter to Existing Membership” process to join a chapter and not realize that the chapter membership they just purchased (at a prorated amount) will expire in the near future when their current SHRM membership expires. Because they have a “pending” SHRM membership renewal already on file, SHRM’s automated systems will not send that member a renewal notice, and because the SHRM membership continues once the “pending” SHRM membership activates, the member is unaware that their chapter membership has expired.

If you come across a transaction where chapter membership extends for only a few months but the “SHRM Membership Paid Through Date” extends further, please contact the new member.

SOLUTION:

Inform the member that they will need to log in again and separately add chapter membership to the “pending” SHRM membership by repeating the “Add Chapter to Existing Membership” process.

SCENARIO #4

A current SHRM member decides to “Add Chapter” membership to their existing SHRM membership.

SOLUTION:

- **Membership Expiration Alignment:** The expiration date for the chapter membership will be synchronized with the expiration date of the current SHRM membership.
- **Prorated Chapter Dues:** The individual will be charged chapter membership dues on a prorated, monthly basis. The amount will depend on the time remaining on their current SHRM membership.
- **Dual Membership Renewal:** When their membership approaches expiration, they should renew both their SHRM and chapter memberships simultaneously. This renewal process involves a single “Dual Membership” renewal transaction.

SHRM CORPORATE & SHRM EXECUTIVE NETWORK MEMBERS

Currently, SHRM Corporate members (those whose memberships are acquired in bulk by their company and assigned to employees) and SHRM Executive Network members have a specific process for adding chapter membership, and they cannot use the “Add Chapter to Existing Membership” function on the DMR website. Instead, they should follow these steps:



Contact the SHRM Customer Experience team during their operational hours, which are between 8:00 a.m. and 8:00 p.m. Eastern Time (ET).



Use one of the following contact options:

- For callers within the United States, dial 800.283.7476 and select option 3.
- For international callers, dial +1.703.548.3440 and select option 3.
- TTY/TDD users can dial +1.703.548.6999.



Alternatively, they can **reach out via email** at shrm@shrm.org.

The SHRM Customer Experience team will assist them in the process of adding chapter membership to their existing memberships.



STUDENT, RETIREE AND HONORARY MEMBERSHIPS

The DMR program primarily focuses on professional members who have voting rights and the ability to hold office in the chapter and for whom the chapter receives CFSP from SHRM.

Here's how the program differs for student and retiree members:

- **Exclusion from CFSP Calculations:** Student and retiree members are not included in the calculations for CFSP payments because their SHRM membership costs differ. Consequently, the DMR program does not impose any specific requirements on their chapter membership.
- **SHRM Membership Not Mandatory:** Student and retiree members are not obligated to be SHRM members in order to belong to the chapter. However, SHRM encourages them to be SHRM members, and if they choose to do so, SHRM can maintain their chapter membership record in the AMP roster. If they opt not to become SHRM members, the chapter will need to maintain separate records of their chapter membership because they won't be in the SHRM membership management data system.
- **Chapter Autonomy:** The chapter retains full autonomy in determining its annual dues for Student, Professional, and Retiree members. This includes the ability to decide whether to offer discounts or complimentary Honorary memberships to any members.
- **DMR Collection:** The DMR program will collect the annual dues amount set by the chapter for professional membership. If the chapter decides to offer reduced rates for student or retiree members, the chapter should collect those dues directly from the respective members. Subsequently, the chapter should contact SHRM Member Relations to manually add these members to the chapter roster of record (if they are also SHRM members).



FREQUENTLY ASKED QUESTIONS

Do SHRM and chapter membership purchases always need to be aligned to the same renewal cycle?

Yes. For example: If a member wishes to purchase a two-year chapter membership, that purchase must be connected to a two-year SHRM membership.

Does the DMR support distinct pricing?

Yes. The DMR can support distinct pricing for one-, two- and three-year terms. Two- and three-year terms can be at lower annual rates, similar to how SHRM offers a 10% discount for the purchase of a two-year membership and a 15% discount for a three-year membership purchase.

Can a chapter offer additional packaging options, such as prepayment of annual meeting fees?

Yes, however, the transaction must be managed by the chapter separately. Chapters may also choose to include meeting/event fees in the cost of annual chapter membership dues that is set as the singular price option on the DMR website.

What is a dues holiday?

This is entirely optional and at the complete discretion of the chapter leadership. Keeping in mind that when a chapter joins the DMR program, all current chapter “Dual” members will have new chapter membership records created to align with the members’ current SHRM membership start and end dates. A “dues holiday” is when the chapter decides as part of the initial transition period when joining the DMR program not to invoice members for any gaps between their chapter membership and their current SHRM membership and extends the chapter membership until it is time for the members to renew their SHRM membership. At that time, the member will renew both memberships at full price in the same transaction on the DMR website. Exceptions to this rule would be made for chapter members who hold a current multiyear SHRM membership that would not expire for 12 months or more.

Example: The current chapter membership will expire on Dec. 31, but the member’s SHRM membership does not expire until June 30 next year. The chapter may invoice the member one final time for six months of chapter dues to cover the “gap” between January and June of the next year, or the chapter may offer the member a “dues holiday” for that period, meaning that the member does not owe any dues to the chapter until the time of their next SHRM membership renewal.

Where can I go for Troubleshooting and Reporting?

For assistance with DMR-related issues, please contact the SHRM Membership Relations Team at: shrm.memberrelations@shrm.org

For more FAQs, please visit the [DMR Chapter Tool Kit](#) webpage on the [VLRC](#) website.