

PROFESSIONAL SECTION PLAYBOOK

APRIL 2021

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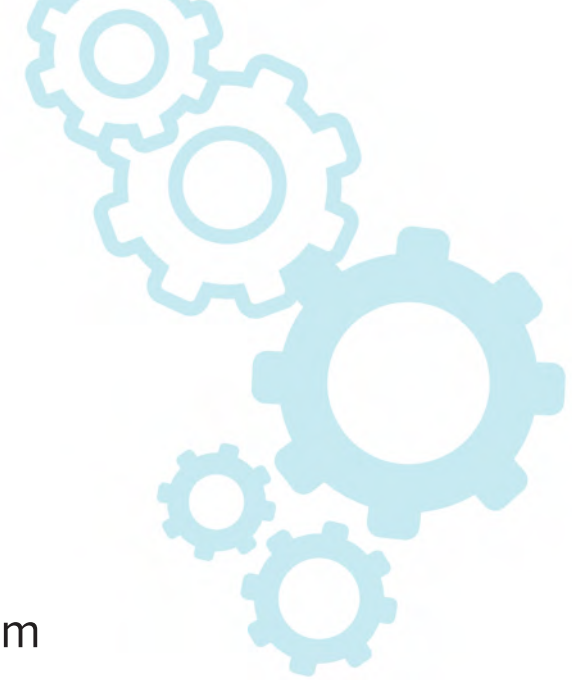
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SECTION COORDINATORS



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Your Section Coordinator is your **first point of contact** for section related matters including:

- Resources
- Section development strategy
- Activity ideas
- Troubleshooting
- Volunteer training
- Email communication (GMEC)
- Promotional materials
- Reporting on section membership

SECTION OPERATIONS



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ABOUT PROFESSIONAL SECTIONS

Professional sections (or simply known as “sections”) are ASME local chapters that are led by volunteers to provide members in an area additional opportunities to engage. As a benefit of their membership, each ASME member is automatically assigned to a section based on their geographic location.

Within the sections, members can engage professionally through courses, activities, networking and meetings. By being inclusive of all members in an area, sections allow for interdisciplinary interaction and community.

ASME professional section volunteer opportunities allow members to get involved in a meaningful way and increase their visibility in the mechanical engineering field. From planning impactful community outreach and events to managing finances, each role plays an important part. Volunteering at the section level is also a great way to build strong local networks with members and businesses as well as to grow skills that you may not have a chance to at your regular job. Our members believe that engineering is a way to better the world.

Wherever you go and at every step in your career, ASME has a place for you.

ABOUT STUDENT SECTIONS

ASME helps university engineering students develop their professional identity and provides essential engagement opportunities by offering access to a wide range of activities and resources such as membership, competitions, scholarships, student sections and much more!

Student Sections provide community during the college experience. These Student Sections may participate in design competitions, E-Fest, EFx, fundraising, volunteer work, university activities or partnering with local schools to provide STEM activities. The Student Sections also give students the opportunity to lead and make meaningful decisions for their group.

We encourage our professional sections to connect with student sections in their area for special events and mentoring opportunities.

ABOUT THE MDE SECTOR

The Member Development and Engagement (MDE) Sector, under the direction of the Board of Governors, is responsible for providing governance for Professional Sections, Student Sections, member development, and the Old Guard Committee. It is responsible for member development and engagement including activities of the Society relating to developing future leaders, liaising with and engaging Professional and Student Sections, developing rules of engagement with other Sectors and the Committee on Finance (COF), providing oversight of training for groups and communicating expectations and opportunities for alignment with the ASME mission and strategy.

The MDE and staff work in collaboration to assist in providing improved communications, web tools, member development opportunities and financial guidance and support.

SECTION & SUBSECTION STRUCTURES

SECTION

- At least 50 founding members
- Led by a Section Leadership Team of 2 – 7 members
- * = required
 - Chair *
 - Vice-Chair
 - Secretary *
 - Treasurer *
 - (3) Member at Large

SUBSECTION

- 20 founding members
 - If less than 20 members, formation must be approved by MDE
- Led by a Section Leadership Team of 2 – 7 members
- * = required
 - Chair *
 - Vice-Chair
 - Secretary *
 - Treasurer *
 - (3) Member at Large
- When a subsection reaches 50 members, it will be eligible to reclassify as a section

NOTE: If there are less than the required amount of founding members, a Section Coordinator can request approval for a section or subsection from the MDE Sector.



SECTION & SUBSECTION FORMATION PROCESS

STEPS FOR FORMATION

1. Establish geographic boundaries.

If the proposed section is in North America or a country that already has another ASME section, please provide a list of proposed postal codes the section will serve. International sections that are the only section in their country will encompass the entire country.

2. Gather founding members to charter the section.

Please refer to section and subsection structures on page five for the amount of founding members needed. Information to be submitted in a spreadsheet: Full name, ASME member number, and email address. The section coordinator can help reach out to the members in your area and manage their responses to be founding members.

3. Identify volunteers for the inaugural Section Leadership Team (SLT).

To fulfill the functions and responsibilities required of the section, the SLT shall be comprised, at a minimum, of a Chair, Treasurer and Secretary. Learn more about each leadership role on pages seven and eight. All SLT members must be ASME members in good standing.

4. Create and submit a Sustainability Plan

Create a tentative plan for the section's first year. Your Section Coordinator can provide you with the Sustainability Plan to fill out. The plan will help your section schedule a variety of events over the fiscal year to engage local members.

5. Volunteer Agreement Form

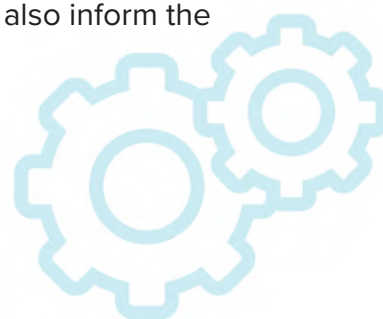
Upon approval, all members of the SLT will need to sign the ASME Section Volunteer Agreement Form.

6. Tools and training

After all forms for all volunteers are received, the Section Coordinator will provide documents, training, and tools to members of the SLT. Please note that any volunteers changed or added later in the year will also need to complete and submit these forms.

7. Introduce the SLT to the members of the new section!

The section coordinator can customize the message to reach the section's members who have opted in to receive updates from the section. Send a message to let your local section members know the section has been formed and share an event with them. This is an opportunity to also inform the section members of any available opportunities to volunteer with the section.



LEADERSHIP ROLES

The purpose of the Section Leadership Team (SLT) is to provide a welcoming and engaging ASME community in their geographic area while supporting the ASME mission and vision. This collective group of volunteers manage the section's governance/administration, activity planning, finances, and other operational tasks.

The SLT volunteers are the primary contacts for the section; the team signs the required ASME Volunteer Agreement forms, has access to ASME-issued tools and training, and is responsible for managing section finances.

CHAIR *REQUIRED*

- Key contact for the section.
- Votes on section-related decisions.
- Presides at SLT meetings.
- Leads/advises the SLT on activity development initiatives and new pathways of engagement.
- Delegates tasks and organizational responsibilities as needed.
- Identifies innovative and beneficial activities for the section and ensures ASME policies and procedures are followed.
- Provides input for activity planning and budgeting.
- Guiding the section succession planning process.
- Ensures the submittal of required section information and reports to the Society through the tools provided by the Section Operations team.
- The Chair is an ex officio member of all committees.

The Chair may not simultaneously hold the role of Treasurer.

VICE-CHAIR

- Votes on section-related decisions.
- Actively assists, supports, and advises the Chair with responsibilities as listed above.
- Presides in the absence of the Chair at SLT meetings.
- Performs special projects and additional duties as may be assigned.
- Fills role of chair should chair vacate position.

SECRETARY *REQUIRED*

- Votes on section-related decisions.
- Maintains key section documents and records.
- Prepares and distributes meeting notifications, agendas and logistics for each SLT meeting/teleconference.
- Assists in the preparation and submission of After-Activity Reports.
- Submits incoming volunteer and position information to Section Operations team for ASME database.
- Issues "Call for Volunteer Nominations" seeking candidates to fill open personnel positions via GMEC and ASME approved social media.
- Updates all section online presence at least quarterly with updates and event information.
- Manages who has permissions to administer and edit the section's external online accounts.

TREASURER *REQUIRED*

- Votes on section-related decisions.
- For sections within the U.S.: Conducts monthly categorizing of Consolidated Banking transactions in ASME's online Unit Register system.
- For sections outside of the U.S., ASME holds all section funds and will pay vendors or reimburse volunteers from the section's funds. The treasurer can contact their Section Coordinator to facilitate these transactions. If an international section has an ASME approved bank account, the treasurer shall complete and submit the U.S. Foreign Bank and Financial Accounts (FBAR) form annually.
- Responds to requests, as necessary, from ASME related to finances.
- Works with SLT to prepare annual section budget and provides financial status reports regularly, in compliance with ASME financial and reporting requirements.
- Trains and provides documents and records to successor assuming Treasurer position.
- Assists in the preparation and submission of Section Activity Funding Request.

The Treasurer cannot simultaneously hold the role of Chair.

MEMBER AT LARGE (UP TO THREE)

- Votes on section-related decisions.
- As a member of the SLT, the Member at Large is responsible for supporting communications, web/social media posts and updates, assisting with ASME-related administrative tasks, member development initiatives, students, student section relations, awards/recognitions, activity planning and programming.



SELECTION OF VOLUNTEER LEADERSHIP

Section leadership position terms start on July 1 and end on June 30. Each section leadership position is nominated for a 1-year term, with ideally a maximum of 3 consecutive years of service in a position for any given volunteer. If a section looks to extend the maximum, they will need a special dispensation from the MDE.

In April of every year, the SLT should begin the process of searching for qualified candidates to fill their expiring team positions. The SLT should strive to recruit members from a diverse background of expertise and business knowledge. ASME student members in good standing are eligible to serve on the SLT, with the exception of Chair.

- SLT members may recruit known qualified interested parties, and
- the section is encouraged to issue a “Call for Volunteer Nominations” to the general membership, and
- may also select from among qualified individuals to fill open/expiring positions.

The process for selection can be defined by the SLT as needed. See the appendix of the Professional Section Handbook for sample nomination form or contact your Section Operations Team for guidance.



LEADERSHIP ON-BOARDING

GROUP LEADERSHIP DEVELOPMENT CONFERENCE (GLDC)

Each year, leaders from each section (in addition to other ASME groups) are invited to participate in GLDC, a weekend training conference hosted by the MDE Sector.

This conference provides:

- Ample opportunities to network with your peers
- Interactive breakout sessions on key topics that will help you going forward as a volunteer leader
- An opportunity to learn more about the strides ASME is making to enhance the services provided, and the relationship between staff and volunteers
- Opportunities for collaboration

VIRTUAL TRAININGS

Virtual trainings will be provided for section leaders. These training opportunities will bring leaders up-to-date information on the procedures, resources and tools to succeed. After the new fiscal year’s leadership and their signed forms are submitted to ASME, each leader will be invited to attend or review a virtual training.



SECTION OPERATIONS

TIMELINE

FEBRUARY

- Sections should expect voluntary member contributions to be deposited into their group's segregated account.

APRIL

- Sections begin the new leadership election processes for the upcoming fiscal year.
- Existing & incoming SLT members should begin planning activities for the new fiscal year.
- Review the section's activities conducted over the past program year to develop an estimated budget for the new program year.

MAY & JUNE

- One or more leaders from each section will attend the Group Leadership & Development Conference (GLDC).
- Section Recognition Award nominations due.
- Sections should submit their Section Update Form and Section Activity Plan to update their leadership roster and section information by June 30.
- Sections must submit any After-Activity Reports that have not been submitted yet.
- U.S. sections must confirm all of their transactions have been coded in the Unit Register.
- All section leaders for the next fiscal year must submit a new Volunteer Agreement.
- Staff will record leadership and share training information.

JULY **ASME NEW FISCAL YEAR BEGINS**

- ASME's new fiscal year begins and the new leaders begin their roles.

OCTOBER

- October 1 – ASME member renewals due.



SUPPORT TOOLS

STAFF SUPPORT

Section leaders have access to ASME staff dedicated to section operations and support. Your ASME Section Coordinators will serve as your first point of contact for any questions.

PROFESSIONAL SECTION HANDBOOK

The Professional Section Handbook provides volunteers with detailed information to organize and manage their professional sections or subsections.

MONTHLY NEWSLETTER

Each month, the section operations staff sends all professional section leaders a newsletter with updates, reminders, opportunities, and more to keep our leaders in the loop.

REGIONAL CALLS

Section leaders are invited to regional calls every one to two months to connect with each other, provide input on section or regional topics, and receive updates.

LINKEDIN GROUP FOR SECTION LEADERS

Engage directly with other leaders online in this optional group. The monthly newsletter and other important updates will also be posted in the group so you stay informed through your preferred method.

EVENT PROMOTION

Through a simple form, create mass email updates to members of your section and have your event considered for the public calendar on ASME.org.

VOLUNTEER LEADERSHIP DIRECTORY

Find sections, other committees or volunteers by location or name to connect.

>>> <https://vld.asme.org/>

ASME COMMUNITY PAGE

Online platform for all groups to engage online and post news, files and other content.

EVENT IDEAS & TIMELINE

- Social / Networking events
- Conduct a program with local industry
- Early Career Program
- Public Policy Activity
- Engineering for Global Development Activity
- STEM Activity
- Support an ASME Student Section Activity
- Technical Tours
- Training Workshops
- Volunteer day
- Webinar / Virtual Event



TIPS FOR EFFECTIVE SECTION MANAGEMENT

- Maintain clear and effective communication
- Read the monthly newsletter
- Communicate with your section coordinator
- Listen to your section's members to understand what types of events they are interested in
- Manage tension
- Set a good example
- Prevent team burn-out through succession planning
- Empower your team to do their job
- Encourage collaboration
- Provide constructive feedback



3-4 MONTHS BEFORE THE EVENT

- Determine if the event will require funding and, if needed, submit a Section Activity Funding Request form online
- Submit any event contracts for review and approval by ASME

1-2 MONTHS BEFORE THE EVENT

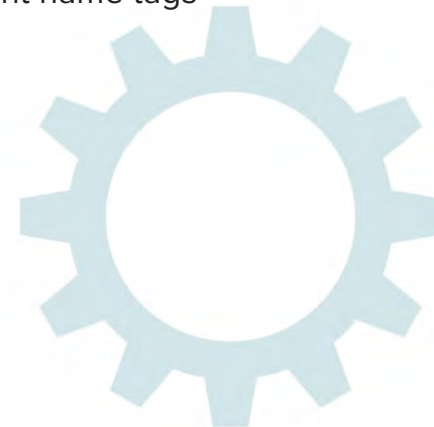
- Identify audience groups for marketing the event and send email to members
- Confirm event details including registration process
- Add event to Community Page and any social media pages

1-2 WEEKS BEFORE THE EVENT

- Send email reminder
- Reconfirm event details, send instructions to event volunteers, print name tags
- Assign volunteers for greeters, registration, taking photos, etc

AFTER THE EVENT

- Submit the Section After-Activity Report form online
- Code transactions (U.S. Sections only)



SECTION ACTIVITY FUNDING PROGRAM

The Section Activity Funding Program (SAFP) has been established to provide financial support to ASME sections that lack sufficient funds to plan and conduct approved ASME activities.

Sections with annual spend limits of \$10,000 or less and international sections can apply for funding of up to \$2,500 per year. Sections with an annual spend limit greater than \$10,000 can apply for up to \$1,000 per year. Application and criteria can be found in the Professional Section Handbook.

CONSOLIDATED BANKING

All U.S. based sections have access to segregated accounts (accounts that hold funds for group activities) through JP Morgan Chase. Expenses are coded by the section's treasurer in the Unit Register tool. Funds in these accounts are replenished by registration income, annual member contributions, and fundraising.

INTERNATIONAL SECTIONS' ACCOUNT

Due to the variety of banking laws internationally, ASME has created an account where all international sections' funds are held. ASME's treasury can directly pay invoices and reimburse volunteers with proper expense approval from this account. ASME understands that each country has unique laws around taxes and wire transfers so our treasury department is available to work with each international section to identify the best process.



EMAIL SECTION MEMBERS

Email details promoting your event or news about your section to all local members who have opted-in to receive Section Communications through ASME's provided tool. Sending emails to your section through the tool provided complies with ASME's privacy policy for personal data.

COMMUNITY & COMMUNICATION TOOLS

VOLUNTEER LEADERSHIP DIRECTORY (VLD): This directory enables individuals to find and message volunteer leaders of a group for the purpose of ASME-related activities. The system is intended to enable messaging and discovery of volunteer leaders without the sharing of personal information.

ASME COMMUNITY PAGES: The ASME Community platform is an online social space for individuals who are interested in engineering to engage online. This tool allows members of individual sections to have a central place for communication specifically for their section.

SOCIAL MEDIA: ASME allows sections to maintain their own social media pages while adhering to ASME's Social Media Guidelines (available in the Professional Section Handbook) to serve as a space for members to connect and events to be shared.

LOGOS AND MARKETING COLLATERAL: ASME creates logos for new sections upon request. ASME marketing collateral can be requested through your Section Coordinator.



AUSTRALIA SECTION



ECUADOR SECTION

RECOGNITION PROGRAM

The Professional Section Recognition Program highlights the accomplishments of our outstanding sections. This new recognition program is designed to shine a light on the amazing work our professional sections produce throughout the ASME program year. Our sections make a difference in the lives of mechanical engineers throughout the world, and this is our opportunity to congratulate the volunteer leaders and members on their great work!

Details on each award and their financial and recognition incentives can be found in the Professional Section Handbook.

Section Achievement Award

This award will be given to all professional sections that meet a series of criteria in managing and engaging that have resulted in an opportunity for a robust section experience for their members.

Section of the Year Award

This award will be given to one outstanding section eligible to receive the Section Achievement Award and meets a minimum of three additional required criteria listed in the Professional Section Handbook (points earned will be dependent on the proven success of activities; extra points will be given to sections that successfully meet additional criteria). Details can be found in the Professional Section Handbook.

Section Innovation Award

This award will be given to one innovative section that is eligible for the Section Achievement Award and develops and executes a creative and original event benefiting the members highlighting one of ASME's five strategic technologies (Bioengineering, Clean Energy, Manufacturing, Pressure Technology or Robotics) through industry engagement, professional development or K-12 engagement. Details can be found in the Professional Section Handbook.

Best Activity Ever (BAE) Award

This award is given to one exceptional section that is eligible to receive the Section Achievement Award, along with successfully developing and executing an activity that engages at least 25% of the section's membership, addresses the needs of section members, provides community connectivity, engages students and early career engineers, and either breaks even or creates revenue for the section. Details can be found in the Professional Section Handbook.



