



PROFESSIONAL SECTION PLAYBOOK

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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
- Communication guidance
- Promotional materials
- Reporting on section membership

SECTION COORDINATORS



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--
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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 activities, networking, meetings and courses. 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, and much more!

Student Sections provide a community during the college experience. Student Sections may participate in design competitions, E-Fest, E-Fx, fundraising, volunteer work, university activities or partner with local schools to provide STEM activities. They also give students exposure to leadership roles, opportunities to make meaningful decisions for their group and positively impact their community.

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



SECTION STRUCTURE

SECTION

- At least 50 founding members for a Section, 20 for a Subsection
- Led by a Section Leadership Team of 3 – 7 members
- * = required
 - Chair *
 - Vice-Chair
 - Secretary *
 - Treasurer *
 - (3) Member at Large
- Volunteers can hold multiple roles. However, the Chair and Treasurer roles cannot be held by the same person.

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



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.

Gather members to charter the section who are willing to commit to the formation and success of the section and its activities. The section coordinator can help reach out to the members in your area and manage their responses to be founding members. Information to be submitted in a spreadsheet: Full name, ASME member number, and email address.

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. The Sustainability Plan online form and supporting documents will give you an idea of the various types of approved activities and things to consider for planning. 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.
- 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.
- Responsible for the section’s succession plan.
- 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 U.S. & select international sections: 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 directly or reimburse volunteers from the section’s funds. The treasurer can contact their Coordinator to facilitate these transactions.
- Responds to requests, as necessary, from ASME related to finances.
- Manages any financial tools such as check books, card readers and debit cards. Ensures ASME is updated of any changes in possession.
- 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.
- Ensures smooth transition of tool and resource access to the next Treasurer by following th checklist for incoming and outgoing treasurers in the Finance section of the Handbook.

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.

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. Suggestions and samples can be found in the Professional Section Handbook. Your Section Coordinator can also provide guidance.



LEADERSHIP ON-BOARDING

LEADERSHIP TRAINING

Training is provided to all Section Leadership Team volunteers each year, typically around September.

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

- Section Recognition Award nominations due.
- Sections should submit their Section Update Form 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.

SEPTEMBER

- Training for section leaders.



SUPPORT TOOLS

ASME SECTIONS WEBSITE

Find professional and student sections, access resources, and helpful links, and view program opportunities. >>> <https://sections.asme.org>

STAFF SUPPORT

Section leaders have access to ASME staff dedicated to section operations and support. Your ASME Section Coordinator 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.

NEWSLETTER

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

VIRTUAL LEADERSHIP MEETINGS

Section leaders are invited to virtual meetings 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/>

ACTIVITY IDEAS

- Volunteer in the community
- Support an ASME Student Section Activity or host a joint event with students
- Celebrations (welcome event for students, awards, graduation)
- Early Career Program
- Social / Networking events
- Conduct a program with local industry
- STEM, Public Policy, Engineering for Global Development Activity
- Tours (businesses, museums, ASME landmarks, facilities of interest, etc)
- Educational events, training workshops or PDH-earning opportunities
- Webinar / Virtual Event
- Career/Job fair



SUCCESSFUL SECTION LEADERSHIP

- Maintains clear and effective communication
- Communicates with your section coordinator
- Listens to your section’s members to understand what types of events they are interested in
- Encourages collaboration
- Manages tension and sets a good example
- Prevents team burn-out through division of labor and succession planning
- Encourages fellow and future leaders
- Provides constructive feedback



FEATURED ACTIVITIES



ASME Mid-Hudson Professional Section hosted their “Annual Summer Get Together” at Brooklyn Cider House. Attendees toured the facility, sampled ciders, and shared ideas for future events. This event was attended by a mixture of recent graduates, early career engineers, and experienced professionals.



In March of 2022, students from the Virginia Commonwealth University - Richmond Student Section toured the Smithsonian National Air and Space Museum’s Steven F. Udvar-Hazy Center.



The ASME India Professional Section hosted Dr. Nidhi M. B., a consultant for KDISC and an Associate Professor at MBCET, for a webinar on “Women in Mech: Smart Manufacturing.” The webinar aimed to help the 60+ attendees understand industry trends as well as the basics of Smart Manufacturing technology.

GRANTS FOR LOCAL OUTREACH & ENGAGEMENT

The Grants for Local Outreach and Engagement (GLOE) fund has been established to provide resources for ASME sections to increase local engagement. The fund will support start-up groups interested in establishing a new section or small interest groups; for sections to promote local outreach programs and events; and for events/activities targeted for early career and student members.

The fund will be available to members in good standing who are interested in planning an engagement opportunity for local ASME members and engineers. Sections and interested members can apply for grants with amounts ranging from \$100 to a maximum of \$2,500, per program year. Details can be found on the section website.

DOMESTIC (U.S.) & SELECT INTERNATIONAL

All U.S. based sections and select international sections have access to segregated accounts (accounts that hold funds for group activities) set up by ASME. Funds in these accounts are replenished by registration income, annual member contributions, and fundraising.

INTERNATIONAL SECTIONS

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. International sections may also request a segregated account with a debit card.



EMAIL SECTION MEMBERS

By simply filling out a form, an email with details promoting your event or news about your section will be crafted and sent to all local members who have opted-in to receive Section Communications through ASME's provided tool. ASME email system maintains an updated list that complies with ASME's privacy policy for personal data.

COMMUNITY & COMMUNICATION TOOLS

SECTION PAGE

On the ASME Sections website, each section has a page that provides information on its upcoming and past events, links to the section's social media, and a link to its listing in the Volunteer Leadership Directory, so interested individuals can connect with the section.

SOCIAL MEDIA: ASME encourages 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. Branded graphics for social media posts are available on the ASME Sections website.

LOGOS AND MARKETING COLLATERAL: ASME creates logos for new sections upon request. ASME marketing collateral is available in the Resource Library.

VOLUNTEER LEADERSHIP DIRECTORY (VLD): This directory enables individuals to 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 the recipient's personal information.



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.





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