

# **OFFICER AND COMMITTEE CHAIR ROLES, RESPONSIBILITIES, AND PROCEDURES**

Society of Women Engineers  
Orange County Section

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## GENERAL RESPONSIBILITIES

Officers will make every effort to attend the monthly planning meetings. If they cannot attend, they must submit a written report by updating the meeting agenda via Google Drive prior to the meeting to facilitate communication among the executive board. Officers are also responsible for working with the Nominating Chair to recruit chairpersons for their committees and their successors.

Committee chairs are not required to attend the monthly planning meetings, but are encouraged to attend. If they do not plan to attend, they should submit a written report to their officer contact prior to the meeting or update the meeting agenda themselves via Google Drive if there is something relevant to report.

Officers and committee chairs must:

- Submit updates for the SWEekly email to the President or Secretary (one of which is responsible for generating the content via Mail Chimp)
- Submit the same information to the Webpage Chair to keep the website up to date via the SWE website portal.
- Advertise their event on social media and other venues as they see applicable.
- Track event attendance and event volunteers (if applicable)
- Submit an [Event Report](#) via Google Forms

### 1.1 RESOURCES

All resources referenced throughout this document can be found in the SWE-OC Google Drive via your SWE OC email address. The President is responsible for controlling access to and resetting passwords for these email addresses.

## PRESIDENT

### RESPONSIBILITIES

- The President oversees the other Executive Officers: Internal Vice President, External Vice President, Treasurer, and Secretary
- The President also oversees the following Chair positions: Nominating Chair, Outreach Chair, and Collegiate Relations Chair.
- Change Gmail passwords and recovery phone number & email
- Add leaders to and monitor [SWE OC Slack Channel](#)
- Represent SWE to the engineering community, including other professional organizations and companies.
- Receive and delegate correspondence from SWE HQ, other SWE professional and collegiate sections, other organizations, and individuals. Most of these requests come via email or the website contact page (see [Webmaster](#)).
- Propagating SWE HQ membership updates to other officers and chairs at least quarterly.
- Respond to the concerns of officers, committee chairs, and members of the section.
- Chair monthly planning meetings, business meetings and other meetings of the section.
- Lead introductions and announcements at the dinner meetings.
- Express appreciation to officers, committee chairs, members of the section, and others on behalf of the section and individually.
- Identify volunteers for open positions.
- Coordinate training volunteers for their positions.
- Ensure officers and committee chairs have the resources and information to do their jobs.

Timeframe	Task	Resource
June	<p>Prepare, send, and tabulate member surveys. By surveying the membership, the section can incorporate programs of interest to members.</p> <p>Create an FYxx Contact Information Google Spreadsheet and have officers and chairs fill in / confirm their information to start the year.</p>	<p>Use <a href="#">Google Forms</a> for surveys.</p> <p>Add officer contact info to your phone contact list ahead of when you might need it</p>
June	<ul style="list-style-type: none"> <li>● Solicit dates for planning retreat</li> <li>● Recruit members for committee positions (plan year round)</li> </ul>	<p>Use Doodle, LettuceMeet or other meeting coordination to solicit available times. Create Planning Day EventBrite, advertise via SWEekly emails and email directly to officers to maximize attendance.</p>

July/Aug	<ul style="list-style-type: none"> <li>Hold training and transition meetings for officers and committee chairs.</li> <li>Work with officers and committee chairs to establish goals.</li> </ul>	Transition meetings should ideally happen at the end of the previous fiscal year.
July / August	Hold planning retreat	President/Planning Retreat/Presentations President/Planning Retreat/Agendas
August	Update Section Brochure Renew PO Box	President/Section Brochure President email
April	Start soliciting Member of the Year Nominations	See example newsletter article / email President/Other Resources
May	<ul style="list-style-type: none"> <li>Purchase Member of the Year Gift</li> <li>The President will also select up to 4 special President's awards for key members. She should coordinate the budget for these gifts with the executive Committee.</li> </ul>	Member of Year Price Range \$80-100  Special Award Price Range \$25 - 30
May	Organize a presentation for the Recognition Dinner to discuss the year's accomplishments.	Awards & Recognition Banquet/Presentations
Continuous	Develop and maintain organization chart	President/Org Charts
Continuous	Prepare and maintain officer and committee chair roster. In addition to the officers and committee chairs, send this to Society.	President/Rosters
Weekly	Weekly Email (can be delegated to Website Chair)	Sample Weekly Email (MailChimp) President/Other Resources
Quarterly	Write President's column for the newsletter	Examples of past columns can be viewed on <a href="http://www.swe-oc.org">www.swe-oc.org</a> under the Newsletter Tab
Monthly	<ul style="list-style-type: none"> <li>Send out reminder for EC meeting one week prior to EC Meeting</li> <li>Prepare Agenda for EC Meeting</li> </ul>	Sample Agenda President/Other Resources

## 1.2 NOMINATING CHAIR

### DESCRIPTION

The nominating chair solicits officers for next year, prepares and sends out the ballot, and tallies the results. The chair may also have to run special elections, as warranted if an officer moves or steps down.

## RESPONSIBILITIES

- Duties include updating the Nomination and Interest form to solicit candidates, E-mailing out this solicitation form to members, calling members to solicit candidates, compiling the responses, requesting biographies from candidates, preparing the ballot, mailing the ballot, tallying the responses, announcing the results, and writing two or three newsletter articles.
- The official responsibility of the nominating chair is to obtain candidates for officer positions, but she will also solicit committee chairs to give the new President a head start. She may also work with the new President to arrange training for the officers and committee chairs.
- The petition process needs to be included with the slate:
  - Additional candidates may be nominated by petition, provided that:
    - The member is eligible for the position;
    - The member has given written consent to being placed on the ballot;
    - A minimum of two percent or five of the voting members of the section, whichever is greater, have signed a petition or endorsed an email to place the candidate's name on the ballot; and,
    - The petition, together with the written consent, is submitted to the chair of the nominating committee by April 30 or fifteen days after the slate is announced to the members of the section, whichever is later.
- Chair of the nominating committee shall arrange for the distribution of ballots to occur at least **twenty-one days prior** to the required return date for the vote. Voting may be by mail, electronic mail or web-based provided that mail ballots are sent to those without electronic access.

Timeframe	Task	Resource
December/January	Start discussing candidates for next year's slate of officers	
January	<ul style="list-style-type: none"> <li>• Write article for SWEekly newsletter soliciting candidates</li> </ul>	Nominating Committee/Candidate Solicitation Article Example.doc
January 20	<ul style="list-style-type: none"> <li>• Update Nomination &amp; Interest form and post to website</li> </ul>	Nominating Committee/FY10 Nomination Form.doc
February	Discuss candidates for Nominating Committee	You should ask for volunteers for these 3 positions prior to the March Planning meeting. The 3 members that make up the nominating committee cannot be on the ballot.
February 1	<ul style="list-style-type: none"> <li>• Send Nomination and Interest form to president@swe-oc.org</li> <li>• Deadline for return of forms</li> </ul> Nomination Forms (Approx March 1) Committee Chair position forms can be continuously collected. The Committee	Example Tracking Spreadsheet  Nominating Committee/Potential Committee Chair.xls

	<p>chair positions do not have to be filled at the time the ballot is sent out. Everyone placed on the Slate of Officers must submit a nomination form.</p> <ul style="list-style-type: none"> <li>• Keep track of all forms in the Potential Committee Chair Spreadsheet.</li> </ul>	
March	<ul style="list-style-type: none"> <li>• Vote on Nominating Committee at March Planning Meeting</li> <li>• Talk to Officers, Committee Chairs, and members to determine interest. Work with Executive Committee to fill slate</li> </ul>	
March 15	<ul style="list-style-type: none"> <li>• Finalize the slate of officers</li> <li>• Verify Officers are Members in good standing. This can be confirmed with the Membership Chair</li> <li>• Present slate to membership, send email to president@swe-oc.org, and include information on how to petition to be added to the slate (allow 15 days for petitions)</li> <li>• Ask Slate of officers for Bios</li> </ul>	
April 1	<ul style="list-style-type: none"> <li>• Close collection of the interest form</li> <li>• Finalize the slate of officers including petitions</li> <li>• Verify Officers are Members in good standing. This can be confirmed with the Membership Chair.</li> <li>• Set up a ballot on Survey Monkey (A SWE-OC Account exists and log-in information can be obtained from the President) The nominating committee may have to change the Survey Monkey log-in password during the election process to ensure no one on the ballot can access the survey.</li> </ul>	<p>Nominating Committee/Bios</p> <p>Survey Monkey Log-In can be obtained from the president</p>
April 2	<ul style="list-style-type: none"> <li>• Email a ballot announcement to membership by <b>April 9</b>. (This date is approximate, if the Recognition Dinner falls later in June, then the ballot return date can be pushed out. Coordinate dates with the EC.</li> <li>• Post Slate of officers on the SWE-OC website along with voting instructions.</li> </ul>	<p>Example Ballots can be found once you log into the Survey Monkey Account</p> <p>Example Ballot Announcement Nominating Committee/Election Email Letter Form.doc</p>

		Note: Ballots only go to voting members. Coordinate with Membership Chair for email distribution instructions
April 30	<ul style="list-style-type: none"> <li>• Deadline for return of ballots (Approx April 30 - This is 21 days after the suggested ballot mailing. This can be adjusted, but should occur in time to have results for the Recognition Dinner)</li> <li>• Request a Membership Roster from the Membership Chair</li> <li>• Organize a meeting or telecom with the Nominating Committee to Tally results.</li> <li>• Nominating Chair should review votes and check that all votes come from voting members listed on the membership roster prior to the meeting.</li> <li>• Fill out the Teller's Form and submit to Recording Secretary for inclusion in the SWE-OC Archive</li> </ul>	Teller's Form Nominating Committee/Teller's Forms
May	<ul style="list-style-type: none"> <li>• Notify candidates of win/loss by email</li> <li>• Announce results at Recognition Dinner – This is as simple as submitting a chart with the results of the election to the President for inclusion in the Recognition Dinner presentation</li> <li>• Write SWEekly article announcing results</li> </ul>	Nominating Committee/Officer Announcement Article Example.doc



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## 2.0 INTERNAL VICE PRESIDENT

### DESCRIPTION

- Assists the President in running the section.
- Oversee the Awards & Member Recognition, End of the Year Banquet, Socials, and Diversity Committees and help Chairs fulfill their responsibilities, and filling these roles in addition if they remain vacant
- Oversees membership development for the section and is a liaison between the Orange County Section and the Society
- Makes an effort to attend as many section events as possible to represent the section leadership

### RESPONSIBILITIES

- Help recruit for various Society roles
- Volunteer to assist other officers and chairs on tasks where they need additional support
- Create the database based on monthly membership reports from national, as well as receives data changes directly from members.
- Follow up with new and prospective members after they attend an event, to encourage further participation
- Track the prospective members including the source and date. Prospective members come from various sources including fellow members, student upgrades, website referrals, and meetings
- Contribute articles to the section's newsletter
- Contacting Past Members: This should be done annually. Contact national for a list of past, dropped members over the past few years. Send these past members a letter asking them to rejoin
  - Record new and prospective member information from each event.

## 2.1 AWARDS AND RECOGNITION CHAIR

### DESCRIPTION

This committee chair organizes/facilitates the program that recognizes all persons who volunteer for SWE-OC Section activities.

- There are several individual and section awards given at the national level of SWE. The awards committee fills out the applications and nominates appropriate individuals for awards. The awards chair also seeks out external awards to nominate members for.
- There are also several local awards that the section traditionally nominates members for
- The committee chair finds a person to coordinate each award or coordinates the submission herself with support and input from the officers.
- The goal is to nominate at least one SWE OC member for a non-SWE award each year

**RESPONSIBILITIES**

<b>Timeframe</b>	<b>Task</b>	<b>Resource</b>
Monthly	<ul style="list-style-type: none"> <li>Ask the officers and committee chairs who helped on their committees on a monthly basis.</li> <li>Keep add volunteer names to a master list that will be used at the end of the year to recognize volunteers</li> </ul>	Example Volunteer Tracking List
Monthly	<ul style="list-style-type: none"> <li>Select and recognize one member monthly (Member of the month) and make an announcement at the event held that month, if possible. The President and Vice President are ineligible for this honor. You can poll exec to get nominations for member of the Month.</li> <li>Obtain small gift (~\$5) for each Member of the Month and send to them or deliver at next meeting</li> </ul>	
Monthly	<ul style="list-style-type: none"> <li>Write a short blurb about the Member of the Month for the newsletter stating why the person was chosen. The officer suggesting the person should help provide input for article</li> </ul>	Examples can be found in archived newsletters
March	<ul style="list-style-type: none"> <li>Start discussing ideas and budget for the member recognition gift with the EC. Listed below are places we have used in the past and gifts we have given in the past.</li> </ul>	See below
March	<ul style="list-style-type: none"> <li>Work with the President and Programs Chair to find a venue and set a date for the May Recognition Banquet</li> <li>The Member Recognition Chair is not solely responsible for the May Member Recognition Banquet, but is encourage organizing it with help from the programs chair. If chair cannot take on responsibility of organizing the banquet, she should discuss finding a replacement with Executive Committee.</li> </ul>	
April	<ul style="list-style-type: none"> <li>Finalize the volunteer list. Email all officers and committee chairs to solicit any volunteer names that they haven't already given to you. This will let you know how many gifts to order. We usually order a few extra to account for April/May volunteers and to sell later.</li> <li>Finalize the Member Recognition Gift and place order (Needs to be completed in time to get gift for Recognition Dinner.</li> </ul>	
April	<ul style="list-style-type: none"> <li>Send invitations to Recognition Dinner. Usually flyer format and sent via email to entire list serve</li> <li>A special email invitation should be sent to volunteers informing them that they will be recognized</li> <li>Announcement should be posted in the Newsletter and on the website</li> </ul>	Example email to volunteers

April	<ul style="list-style-type: none"> <li>Remind the Corporate Support Chair to invite Corporate Sponsors to the Banquet</li> </ul>	
April	<ul style="list-style-type: none"> <li>Work with Programs Chair to develop Recognition Dinner Programs</li> </ul>	See past examples

### Past Gifts

- Umbrella
- Toiletry Bag
- Picnic Blanket
- Purse Hook
- Coffee Mug
- Notepad
- Chocolate
- Business Card Holder

Timeframe	Task	Resource
	<ul style="list-style-type: none"> <li>OCEC Awards Due</li> </ul>	
December	<ul style="list-style-type: none"> <li>Region B Awards Due</li> </ul>	
March 31	<ul style="list-style-type: none"> <li>Individual Award Nominations Due</li> </ul>	See resources
July 1	<ul style="list-style-type: none"> <li>Section Awards Due</li> </ul>	

### Resources

- National Individual Awards
  - [http://societyofwomenengineers.swe.org/index.php?option=com\\_content&task=view&id=11&Itemid=16](http://societyofwomenengineers.swe.org/index.php?option=com_content&task=view&id=11&Itemid=16)
- National Individual Awards
  - OCEC Awards due in December (info will be posted on their website <http://www.ocec.org/home/index.htm>)
- Region B Awards
  - Region B Awards due (<http://www.swe.org/regionB/awards.html> )
- Copies of Past Awards
  - Examples of past awards submitted are archived in Yahoo Groups

## 2.2 END OF THE YEAR BANQUET CHAIR

### DESCRIPTION

- SWE-OC typically hosts an annual end of the year banquet to celebrate the year's accomplishments, recognize section members via awards, and distribute certificate of merit awards.

**RESPONSIBILITIES**

- Create a budget
- Find venue
- Create registration page
- Coordinate with certificate of merit chair for sponsored dinners
- Coordinate President’s gift
- Find member appreciation gift (typically SWE swag)
- Event agenda
- Etc.

**2.3 SOCIALS CHAIR**

**DESCRIPTION**

SWE-OC provides social activities and work life balance activities throughout the year, approximately every other month. Examples of past socials: Hiking, Happy Hour, Card Making, Jewelry Making, Kayaking, etc.

**RESPONSIBILITIES**

- To help arrange and facilitate the annual Summer BBQ, Holiday Party, and other social events for members, in order to promote personal and professional networking and mentoring in an informal and festive environment
- Help arrange and facilitate events for members that promote healthier living and stress relieve; interaction with members of similar interests.
- Work with the Executive Committee to fit social events into the overall section calendar.
- Handle publicity (Newsletter Articles and Weekly Email Submissions) and planning for the events.
- Organize networking luncheons. These are informal lunches where members meet at a local restaurant. The atmosphere is very relaxed and there is not typically an agenda. If new members or potential member are attending, SWE-OC promotional materials such as open positions, upcoming event notices and Section Brochure can be distributed.
- The purpose of the networking lunch social is the same as for the new member involvement. The lunch socials are designed to be convenient for those who cannot attend the dinner meetings at night. The lunches are geared towards new and prospective members. (see timeframe below)

**NETWORKING LUNCHEONS**

Timeframe	Task	Resource
At least 1 month or more prior to event date	<ul style="list-style-type: none"> <li>• Select a location, date, and time</li> <li>• Write a newsletter article for the next newsletter, advertising the event.</li> </ul>	See example newsletter article

	<ul style="list-style-type: none"> <li>Send event information to president, website chair and publicity chair for advertisement</li> </ul>	
1 month prior to event	<ul style="list-style-type: none"> <li>Prepare and send letters inviting new and prospective members to the networking dinner social</li> <li>Take RSVPs</li> </ul>	
2 weeks prior to event	<ul style="list-style-type: none"> <li>Send an e-mail out to the membership advertising the event submit for September Newsletter</li> </ul>	
1 week prior to event	<ul style="list-style-type: none"> <li>Also encourage the officers and committee chairs to attend, so that the new and prospective members can meet them.</li> <li>Confirm RSVPs and make sure everyone has event details (date, time, location, any other instructions)</li> </ul>	
Day of Event	<ul style="list-style-type: none"> <li>Bring brochures, prospect sign-in sheet, applications and current newsletters to the event.</li> </ul>	Brochure, Sign In sheet Newsletter can be downloaded from SWE-OC Website
After the event	<ul style="list-style-type: none"> <li>Fill out the Prospective Member Form and send to the Membership Chair and Corresponding Secretary</li> <li>Submit a newsletter article after the event, reporting the highlights.</li> </ul>	Prospective Member Form Example Newsletter Article

**SOCIALS**

Timeframe	Task	Resource
June	<ul style="list-style-type: none"> <li>Discuss possible dates for the Summer BBQ with the EC s</li> </ul>	
July	<ul style="list-style-type: none"> <li>Finalize date and location for Summer BBQ</li> <li>Develop flyer or write-up to go in the weekly email and/or the newsletter</li> </ul>	
August	<ul style="list-style-type: none"> <li>Hold the Summer BBQ</li> <li>Write up a summary of the BBQ and submit for September Newsletter</li> </ul>	
October	<ul style="list-style-type: none"> <li>Discuss dates for the Holiday Social with EC</li> <li>Discuss locations with the Programs Chair</li> </ul>	
November	<ul style="list-style-type: none"> <li>At November EC Meeting – Finalize date and location</li> <li>Develop Flyer for Holiday Social</li> <li>Send out Publicity for Holiday Social</li> </ul>	
December	<ul style="list-style-type: none"> <li>Hold Holiday Social</li> </ul>	

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	<ul style="list-style-type: none"><li>• Write up summary of Holiday Social and submit for next newsletter</li></ul>	
Ongoing	<ul style="list-style-type: none"><li>• Plan other social events as appropriate</li><li>• Discuss dates with EC and Programs chair so that there are no scheduling conflicts</li></ul>	

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### 3.0 EXTERNAL VICE PRESIDENT

#### DESCRIPTION

- Oversee the Professional Development Conference Chair, Programs, and External Orgs Committees and help Chairs fulfill their responsibilities
- Oversees professional development for the section
- SWE's Professional Development program empowers women to succeed and advance. We support the retention, recruitment and advancement of women in engineering and technology through career services, professional development, and networking

#### RESPONSIBILITIES

- Help set goals and put together the PD program plan. Facilitate and monitor the plan throughout the year
- Coordinate the activities associated with the professional needs of the members of the section.
- Provided information to further the careers, social interaction between our peers, mentoring and networking opportunities, and to enhance the personal lives of the members
- Work with the President to fit professional events into the overall section calendar.
- Help Plan and approve yearly calendar of events and goals.
- Monitor member satisfaction with events
- Maintain a database of potential speakers. These are speakers who have presented to our section or potential contacts for people we might want to speak at one of our events. This can include SWE-OC members that are willing to speak to our section or to one of the student sections.
- Brainstorm and plan professional development events for the section based off section interest
- Help Professional Development Conference Chair plan the Professional Development Conference – find sponsors, speakers, location
- Organize setting the Professional Development Goals for the section and monitor throughout the year.
- Assume the duties of the President if the President is temporarily absent or unable to serve.
- Act as officer contact for those committees put under her supervision by the President. Collect committee chair reports for the monthly EC meetings.
- Perform any other duties and assume any other responsibilities assigned by the President
- Ensure PD and Programs activities are advertised in the newsletter and weekly email.
- It is highly encouraged that the Vice President run for the President office in the following fiscal year.

### **3.1 PROFESSIONAL DEVELOPMENT CONFERENCE CHAIR**

#### **DESCRIPTION**

- This committee organizes the annual professional development conference. This is a special program that goes in depth about leadership and professional development topics. The chair for this event is responsible for the planning of the entire event and overseeing the conference committee, which will perform the tasks described below.

#### **RESPONSIBILITIES**

- Committee Chair – Coordinates all other volunteers, listed below. Sets planning schedule, maintains budget, organizes monthly meetings as needed, prepares and distributes agendas and meeting minutes.
- Speaker Coordinator(s) – Determines conference topics and solicits speakers. Coordinates with the speaker's length of speech, needed A/V equipment, asks for biography, headshot and handouts that are needed for publicity flyers and program book. Determines speaker gift and thank-you cards. Speaker coordinator can be one person, however, in the past, having one person in charge of each speaker allows for more one-on-one communication.
- Location Liaison – Determines location for conference based on price and location. Is the primary contact between SWE and the hotel / conference facility. This task also involves coordinating A/V equipment as needed. Location host is often a sponsor (offers free use of facility).
- Registration Coordinator – Creates registration form and determine method for registration and payment for the conference. Tracks all RSVP's, and confirm conference attendance. On the day of the event, manages the check-in table, take payment if necessary and distribute name tags.
- Flyer Designer – Designs event flyer to be distributed for publicity. Should contain information on location, date, speakers, program format and registration methods.
- Meals Coordinator - The format for this event typically includes both breakfast and lunch. This task involves making arrangements for any necessary catering, including payment.
- Program Designer – Creates a program book which typically contains speaker's biographies, conference schedule, conference handouts, SWE information, and corporate sponsorship acknowledgement. Also coordinates copies and binding of program books by conference predetermined date (assisted by other committee members).

#### **OPTIONAL TASKS / ADDITIONAL INFORMATION:**

- Post Event Survey – Design a post-event feedback form. In the closing remarks of the conference the attendees will be asked to complete this survey prior to leaving. Survey can be a paper or online form. The past years' surveys should be used during planning.
- Poster – Design a poster to be displayed at the event (usually at the registration table). It should highlight the speakers and corporate sponsors.



- Goodie Bag – Coordinate attendee goodie bag containing donated corporate promotional items, snacks, and professional development brochures and flyers.
- Door Prizes – Corporate sponsors or local businesses may contribute to door prizes for publicity at event. If budget allows, door prizes such as gift cards may be purchased.
- It is not necessary to co-host this event with other professional organizations (i.e. ASCE) as SWE typically does the majority of the planning efforts.
- Publicity Flyer is critical. Confirming speakers as early as possible will help assure that adequate publicity time is allotted.
- Speaker and topic selection can have a theme, but should appeal to the target audience.
- This is one of the big events for the year and is a team project; therefore there are many individuals willing to volunteer to have a successful event. The conference and planning for the conference can be as fun and creative as the planning committee chooses it to be.

Timeframe	Task	Resource
December/January	Kickoff meeting; form a planning committee to begin brainstorming ideas; set a tentative budget and goals	Budget spreadsheet Advertise to SWE-OC for volunteers
January/February	Set a date for the conference (usually in April); Contact potential speakers and set a tentative conference schedule	Speaker invitation letter Coordinate with SWE master calendar
February	Contact corporate sponsors for funding, finalize a location	Corporate sponsor letter Coordinate with SWE-OC corporate sponsor liaison
March	Begin publicizing to SWE-OC and other organizations	Flyer
April	Finalize program booklet, meals, event setup, name tags, gifts, door prizes and donations; coordinate final items with speakers	Door prize donation letter
April (Post-Conference)	Hold wrap-up meeting, review budget/income, review survey results	Survey

### 3.2 PROGRAMS CHAIR

#### DESCRIPTION

- SWE-OC typically hosts a professional event every other month from September through April. These events usually take the form of a dinner meeting with a professional or personal development topic speaker.
- Dinner meetings are comprised of SWE-OC announcements, dinner, and a personal/technical/career topic presented by a speaker.
- During the pandemic all programs switched to virtual. Programs consisted of free and virtual Zoom meetings where a professional development topic was presented by a

speaker to attendees. No dinner portion. For virtual events follow instructions that apply. Disregard instructions that apply only to in person programs.

## RESPONSIBILITIES

- Facilitate the dinner meetings / virtual meetings.
- This chair does not have a standing budget. The budget is fluid and ranges per meeting. You will need to keep track of the costs and collections.
- The speaker's dinner is paid for by the Section and a speaker gift is usually given.
- We do not typically pay our speakers. Speaker fees would need to be approved by the EC.
- Often the EC will approve to pay for Student Dinners. Coordinate with the EC.

## ADDITIONAL INFORMATION

**Speakers:** The membership is a good source for potential speakers. A good length for the talk is 20 to 45 minutes.

Once a topic and speaker is confirmed:

- Establish a date. Pick a location that is convenient for the speaker, or create a Zoom meeting if virtual.
- Create Eventbrite for ticketing. Eventbrite has an automatic setting to send out an email to attendees with the Zoom meeting Id and join link prior to the meeting time, usually day of. Check and manage settings to your preferences.
- Ask if the speaker needs any audiovisual equipment for in-person meetings, or coordinate how Zoom meetings will work with the speaker and any slides to present during the meeting.
- Obtain a biography of the speaker and topic description for purposes of introduction and your newsletter article.
- Send a confirmation letter/email to the speaker outlining date, time, location or Zoom link and audiovisual equipment that we will provide. Also, mention if we will provide dinner to the speaker for in-person meetings.
- Locate any needed audiovisual equipment.
- Add the speaker to our newsletter list, at least for the issues that he/she will be mentioned in.
- Obtain a speaker's gift. These can be obtained from the Treasurer.

Afterwards:

- Send a thank you letter to the speaker.

**Locations:** Look for a location that has a separate room. Be aware that some places have minimums. Evaluate menus, prices, and options. A vegetarian option is a good idea.

Establish the cost per person. We should at least break even. Factor in tax, tip, and the speaker's meal. Make the cost nominally more for non-members, e.g. \$20 for members and \$25 for

non-members. Cost for students is a fixed discounted price or free. Solicit members for student sponsorship in the meeting announcements.

- Confirm the date and number of people early on.
- Re-confirm the number of people as the date gets closer, and also the day before the meeting.

### **Marketing Event**

**Newsletter articles:** \*Write an article for the newsletter announcing the date, time, location, menu, topic description, speaker's background, cost, and date to RSVP. The RSVP deadline should be approximately 3 to 5 days before the meeting. Publish the article in the newsletter that comes out right before the meeting. Publish a briefer article in the newsletter before that. \*If newsletter applicable

**E-mail communications:**The e-mail can be very similar, if not the exact same thing, as the newsletter article. Send the e-mail to the e-mail chair / secretary for distribution to the membership in SWEekly emails twice – once about a month before the meeting, and a second time about a week before the meeting. Include Eventbrite link in all email correspondence.

**Social Media/LinkedIn:** Coordinate an event posting with details and Eventbrite link with the publicity chair or whoever is posting to the section social media pages and LinkedIn page. Optional to promote events to your own network, and ask members to promote to their networks on social media and LinkedIn.

### **Other Preparation:**

- Arrange for the Treasurer or other designate to take money
- Arrange for a greeter to greet people. Remind officers to greet people as well.
- Prepare the introduction of the speaker, or arrange for someone to introduce the speaker
- If there is a menu choice, establish a way to handle this. For example, make slips of paper with the choices (fish, chicken, beef, etc.) and ask people what they want as they RSVP. They should put this slip of paper at their place setting.

### **Gather materials to bring:**

- Banner
- Nametags
- Applications
- Receipt book
- Flyers for upcoming events
- Section and national brochures
- RSVP list
- Menu choice slips of paper
- Sign-in sheet
- Prospective member sign-in sheet
- Speaker's gift

**At the meeting:**

- Have the Treasurer or other designate to take money.
- Have the greeter greet people as they enter and help people with nametags
- Introduce the speaker
- Present the speaker's gift

**3.3 EXTERNAL ORGANIZATIONS/DIVERSITY CHAIR****RESPONSIBILITIES**

- Be the primary interface to the Orange County Engineering Council
- Help maintain and develop relationships with other external engineering organizations such as AIAA, ASCE, and IEEE
- Attend or find SWE-OC representative(s) to attend the two meetings per year that the OCEC puts on for their members. These meetings are the Leader's Conference and the Awards Banquet.
- Work with Awards chair on nominations of SWE members for the OCEC's annual awards. You should ask the officers for input on members that might be eligible for nominations. The Award submissions are due in the December timeframe. The banquet is held early in the February/March timeframe.
- Write newsletter articles for the section newsletter to advertise external org events.
- Work with Publicity Chair to publicize SWE-OC events to external orgs.
- Submit weekly E-mail announcements to the president advertising external org events.
- Try to attend the OCEC's monthly board meetings. OCEC Board may ask the SWE rep to participate in the monthly board meetings and send an alternate SWE rep if absence is expected. OCEC Board may also ask that the rep be involved in committees, which meet outside of monthly Board meetings. This is up to the discretion of the chair. SWE-OC would like if you can try to attend as many board meetings as possible, but it is not required. Consult with SWE-OC officers if there is any issue on time commitment.
- Assist the section to develop and implement the best multicultural program to increase and retain a diverse membership.
- Coordinate with Programs, Socials and Networking Dinner chairs to schedule events.

**ADDITIONAL INFORMATION**

- The Orange County Engineering Council (OCEC) is a non-profit umbrella organization composed of Professional Engineering Society Chapters/Sections and sponsoring engineering companies operating in Orange County.
- The Council functions as a forum to exchange information among and pursue engineering goals common to these Engineering Societies and Corporate Sponsors. SWE is a member of the OCEC.
- OCEC website [www.ocec.org](http://www.ocec.org)

## 4.0 TREASURER

### RESPONSIBILITIES

- The Treasurer is responsible for maintaining SWE-OC's bank accounts, as well as the collection, safekeeping, and distribution of the section's funds.
- This involves paying bills, issuing reimbursement checks, sending out receipts for donations, and maintaining the budget.
- The Treasurer will prepare the annual budget, present a financial report at each Executive Council meeting, and answer inquiries on financial matters.
- The Treasurer files the annual financial report to SWE.
- She will as officer contact for those committees put under her supervision by the President and assume other financial duties assigned by the President or the Executive Council.
- The Treasurer oversees the Corporate Relations and Fundraising chairs.

Timeframe	Task	Resource
June/July	Before the Planning retreat, prepare a preliminary budget for the upcoming year. This will be revised and voted on at the Planning Retreat	Example Budget
Mid August	Pay the PO Box Bill	See important information for log in and password
November 15 <sup>th</sup>	990-N E-Post Card must be filed with the IRS by this date	See Filing Instructions
March	Send check and instructions to Science Fair OCSEF	See Science Fair
June	Start filling out the Financial Report. It helps to have last year's report available along with all Bank Statements	Financial Report Form and past reports
July 30	Financial Report Due	Instructions for Filing Online
End of FY	Submit California DOJ Charity Registration Renewal Form (RRF-1) along with a copy of the 990-N E-Postcard filing to stay in good standing with the state of California. This was a new requirement that came to our attention in FY20, and we were cited for delinquency for FY18 and FY19. [Update with resolution after FY21]	CA DOJ <a href="#">Form RRF-1</a> CA DOJ scanned documents in our <a href="#">Google Drive</a>
Monthly	Collect funds from events and deposit in the sections accounts. Keep documentation of the deposit and note what budget category it falls under	
Monthly	Collect reimbursement forms and process payments. Note: All checks require 2 signatures. Updates to signature authority must be made with Bank of America	Reimbursement Forms

Monthly	Update the Budget with income and expenses and send to the president and recording secretary for inclusion in the minutes and to be presented at the EC meeting	
Monthly	Keep a Log of all Deposits and Checks written either in Excel or Quicken. All income and expenses should be categorized by budget category to facilitate filling out the financial report at year end	

**DIRECTIONS FOR FILING E-POST CARD**

Please fill in directions for filing 990-N E-Postcard

**BANK ACCOUNT**

- The checking account is with Bank of America.
- Account number can be obtained from the outgoing treasurer or the president
- There is a deposit only ATM card, pin can be obtained from the outgoing treasurer or the president. If there is a change in officers, a new signature card must be submitted to Bank of America. This requires signatures from old and new officers.
- Bank Statements go to the PO Box

**4.1 CORPORATE RELATIONS CHAIR**

**DESCRIPTION**

The section seeks corporate support for its Outreach and other activities. Corporate donations are needed for activities such as scholarship, science fair, K-12 Speaking Engagements, tours, and general use.

**RESPONSIBILITIES**

Timeframe	Task	Resource
September	<ul style="list-style-type: none"> <li>• URCate a corporate support letter and package asking companies for donations. This should be uRCated yearly.</li> <li>• Send uRCated letter to Webmaster for inclusion on the website</li> </ul>	Example Letter
September	Research local companies and contacts in the area to develop a list of companies to solicit. Include contact name and title. Try to find a specific contact at the company to send the corporate support package to. Finding a SWE-OC member that works for the company may be helpful. Ask the SWE-OC member for help.	Volunteer Responsibilities
September 30	Mail letters to potential corporate sponsors	

September	Start Organizing Fluor Grant	
September 30	Submit Fluor Grant	
October	Start organizing the Western Digital Grant	Past Grant Forms
November 15	Western Digital Grant Due	See Grant Information Below
As needed	<ul style="list-style-type: none"> <li>• Write thank you letters to corporate sponsors</li> <li>• Provide uRCates to the newsletter and website to reflect the current corporate sponsors.</li> </ul>	
April	<ul style="list-style-type: none"> <li>• Work with the Recognition Dinner Chair to invite Corporate Sponsors to Recognition Dinner and Recognize them there</li> <li>• Typically we print a certificate and have it framed</li> </ul>	Certificate Template
June	<ul style="list-style-type: none"> <li>• Start Allergan Grant Package</li> </ul>	
July 1 <sup>st</sup>	<ul style="list-style-type: none"> <li>• Deadline for Allergan Grant Submission</li> </ul>	
As Applicable	Apply for Grants	Examples of past grants Grant deadlines are included throughout this table. See below for detailed Grant Information
As Applicable	Request Corporate Sponsor logo for inclusion on website and in newsletter. Logo size should be consistent with donation type	

## GRANT INFORMATION

- **Western Digital – Due November 15<sup>th</sup>**
  - <http://www.wdc.com/en/company/grantrequest.asp>
- **Allergan Foundation Grant – Due July 1<sup>st</sup>**
  - The funding cycle for these grants begins with the online receipt of grant proposals from May 1, 2010 through July 1, 2010 (by 5:00 p.m. PST), with all back-up materials received by the Foundation on or before July 15, 2010. Announcement of grants will be made in September, with funding awarded in October.
  - [www.allerganfoundation.org](http://www.allerganfoundation.org)
  - Password and Login can be obtained from the Treasurer
- **Fluor Foundation Grant – Ongoing**
  - [http://www.fluor.com/sustainability/community/fluor\\_giving/Pages/applying\\_for\\_fluor\\_foundation\\_grants.aspx](http://www.fluor.com/sustainability/community/fluor_giving/Pages/applying_for_fluor_foundation_grants.aspx)

## 4.2 FUNDRAISING CHAIR

### DESCRIPTION

- This committee chair is responsible for developing and overseeing the fundraising efforts of the Section. This can include but is not limited to the Entertainment Books.

#### **RESPONSIBILITIES**

- Select a fundraising idea
- Publicize the fundraising idea via the weekly email and the monthly newsletter
- Facilitate the fundraising event and handle funds
- Transfer funds to the Treasurer as appropriate
- Entertainment Books
  - Entertainment Books are a long standing tradition for SWE-OC. This fundraiser can be initiated by August. It's a good idea to order them in time to have them at the first dinner meeting.
- Merchandise
  - When ordering member recognition gifts, we typically order some extra to 1) get a better price per item, 2) use for speaker's gifts, and 3) sell at conferences and to event attendees
  - It's usually a good idea to try and sell at the RC during breaks.



## 5.0 RECORDING AND CORRESPONDING SECRETARY

### RESPONSIBILITIES

- The Secretary takes minutes at executive council meetings and is responsible for correspondence, including sending out welcome letters and prospect packets.
- The Secretary will keep a record of action items, approved motions and prepare, correct as directed, and distribute the minutes of meetings to the Executive Council.
- The Secretary should find a backup to take minutes if she is unable to attend the executive council meetings
- The Secretary oversees the production of a membership directory.
- Supervise the Bylaws, Work/Life Balance and Socials Committees

Timeframe	Task	Resource
After each EC Meeting	Send out Meeting minutes within 1 week of EC meeting to the <a href="mailto:swe-oc-exec@swe.org">swe-oc-exec@swe.org</a> email address and ask for any additions or corrections.	Example Meeting Minutes
After each EC Meeting	Meeting Minutes should be archived in Google Group Archive after they are approved. (Under heading EC Meetings)	How to Archive
Ongoing	Keep track of action items and send reminders to responsible officers and committee chairs	
Ongoing	Officers and Committee Chairs will send the Recording Secretary attendance numbers from all SWE-OC events. There is a template for logging this information	Template

## 5.1 BYLAWS CHAIR

### DESCRIPTION

- The Bylaws chair is responsible for maintaining the bylaws and uRCating as required
- The Historian is responsible for maintaining all of the sections records and archiving important information from year to year including by-laws, newsletters, meeting minutes, awards, and other significant information.

### RESPONSIBILITIES

- URcate the bylaws as needed
- Maintain uRCated bylaws and submit changes to the Region

Timeframe	Task	Resource
May	Collect the year's information from the Recording Secretary and Outreach Chair. Enter it in the Historian Tracking Sheet	Historian Tracking Sheet

As Necessary	Add files to Archive as needed.	The SWE-OC file Archive is held at Google Group Archive.
	Keep a file box with Awards, Charter Information, etc.	

## 5.2 NEWSLETTER CHAIR

### DESCRIPTION

- SWE-OC distributes an electronic newsletter approximately once a quarter

### RESPONSIBILITIES

- The newsletter chair collects and writes articles, and organizes the newsletter. Tracks advertisements and job opportunities for accounting purposes
- Corresponds with local SWE newsletter editors
- Provides RCf version of newsletter to Webpage Chair
- Sets article due dates and sends reminders to those who are providing articles for that month
- Establishes article size and length to accommodate newsletter requirements
- Edits articles (as necessary) to accommodate available space, and to correct grammar and punctuation.
- Requests corporate sponsorship logos for inclusion in the newsletter.
- The newsletter chair is responsible for e-mailing the newsletter to [swe-oc@swe.org](mailto:swe-oc@swe.org). Email should be BCCd to avoid mass replies.

## 5.3 WEBSITE CHAIR

### DESCRIPTION

- SWE-OC hosts a website at [www.swe-oc.org](http://www.swe-oc.org). It requires frequent updates to include information on upcoming events.
- Keeps members informed of current events via e-mail using defined distribution lists. These lists require updates to add new members and delete those wishing to be removed.

### RESPONSIBILITIES

- The Website Chair is responsible for updating SWE-OC's webpage with all current events and happenings, maintaining services such as website provider, domain name registration and website forwarding, and webmaster duties.
- The website updates may range from editing current HTML code for calendar updates to building new HTML code and image insertion for new web page content.
- Webmaster duties include responding to technical problems on the website, and responding/forwarding questions from website visitors to the Corresponding Secretary.

- Keep the e-mail lists current, which are [swe-oc@swe.org](mailto:swe-oc@swe.org) and [swe-oc-exec@swe.org](mailto:swe-oc-exec@swe.org)

## **5.4 PUBLICITY CHAIR**

### **DESCRIPTION**

- Assist with the visibility of SWE-OC at local companies

### **RESPONSIBILITIES**

- Assist with the visibility of SWE-OC at local companies
- Coordinate with Programs, Socials, Diversity and Networking Dinner chairs to assist creating flyers for events.
- Coordinate with external organizations chairs to provide flyers to the appropriate contacts in other organizations.

## 6.0 OUTREACH CHAIR

### DESCRIPTION

The Outreach Chair is the focal for the Outreach program. The Chair should actively pursue finding new teachers who are interested in developing the Teacher/OUTREACH Contact database.

### RESPONSIBILITIES

Timeframe	Task	Resource
June / July	Fulfill the Outreach goals for the section	
August/ Sept	Develop Outreach Newsletter or Materials to Send to Teachers	
Oct 30 <sup>th</sup>	Distribute Outreach Newsletter #1 or Materials to Teachers	
December	Develop Outreach Newsletter or Materials to Send to Teachers	
Feb 11 <sup>th</sup>	Distribute Outreach Newsletter #2 or Materials to Teachers	
Monthly	<ul style="list-style-type: none"> <li>Facilitate / receive information and requests for extra Outreach activities and forward to appropriate officer or committee chair</li> <li>Develop promotional materials (i.e newsletter article, weekly email, flyer to solicit volunteers for Outreach Events</li> <li>Coordinate volunteers for Outreach Events</li> </ul>	Outreach Request Form: <a href="https://docs.google.com/forms/d/e/1FAIpQLSdWL6fhpGVUJI7m91JwoUbHROkJ4TXnoPi23nau2OWhc3R6vw/viewform">https://docs.google.com/forms/d/e/1FAIpQLSdWL6fhpGVUJI7m91JwoUbHROkJ4TXnoPi23nau2OWhc3R6vw/viewform</a>
Monthly	<ul style="list-style-type: none"> <li>Ensure that events are publicized and wrap up articles are written for the newsletter. If the event is one of SWE-OC's standing OUTREACH programs, the chair for that program should handle the publicity</li> <li></li> </ul>	
Monthly	Support Outreach Committee Chairs as needed	
Monthly	Maintain the Outreach Contact Database	Mailchimp
Monthly	<ul style="list-style-type: none"> <li>Keep track of all Outreach events and record event volunteer names.</li> <li>Provide the Member Recognition Chair with a list of volunteers monthly.</li> <li>Publicize events to external partners:</li> </ul>	SWE Outreach metric tool: <a href="https://www.surveymonkey.com/r/sweoutreachmetrictool">https://www.surveymonkey.com/r/sweoutreachmetrictool</a> Event Record Form:

	<ul style="list-style-type: none"> <li>● FIRST CA: Deborah Dragon, FIRST Regional Director, Southern California, ddragon@firstinspires.org</li> <li>● SWEnext: <a href="https://swe.org/k-12-outreach/swenext/swenext-publications/">https://swe.org/k-12-outreach/swenext/swenext-publications/</a> (Promote Your Event Section)</li> <li>● Girl Scouts: Lara Childers, <b>LChilders@girlscoutsoc.org</b></li> <li>● Add new teacher contacts to the Outreach Contact distribution list in Mailchimp</li> </ul>	<a href="https://docs.google.com/forms/d/11ZgWVjxd0MiWz4ZCMjOv4U0fNh0QXX-mPfdcRFWhmU4/prefill">https://docs.google.com/forms/d/11ZgWVjxd0MiWz4ZCMjOv4U0fNh0QXX-mPfdcRFWhmU4/prefill</a>
<p>See other Outreach Committee Positions for additional Outreach Dates</p>		

**ADDITIONAL INFORMATION**

- **Outreach Newsletter:** This newsletter advertises SWE-OC’s Outreach Activities, but also provides teachers with fun games, and resources they can use in their classrooms
- **Outreach Contact Database:** This is an email distribution list in MailChimp that lists the names and contact information for all teachers in Orange County that SWE-OC has developed a relationship with. It is used to distribute Outreach information
- **Outreach Requests:** The section will often get requests for SWE to advertise or participate in Outreach events that other organizations are hosting. Ask the requesting organization to fill out the Outreach Request Form. The Outreach chair should make sure that these events are advertised in the weekly email newsletter, on the website and distributed to the Outreach Contacts either via email or an Outreach Newsletter. If there is interest to participate in the event, the Outreach chair should consult with the executive committee to determine level of participation.

**6.1 GIRL SCOUTS CHAIR**

**DESCRIPTION**

- The current Girl Scout program is a ½ a day Girl Scout Badge Workshop that presents lectures and activities to help local girl scouts earn their engineering merit badges.
- The program is typically held twice a year, once in the fall and once in the spring/summer.
- It is typically held at one of the Girl Scout program centers that has a room big enough to hold about 80-85 people
- This position can be held by one person or can be co-chaired. Suggestion: One primary person oversees the organization with the Girl Scout Council (attendees), location and volunteers. A second person organizes the actual event, tasks to be completed, obtains the needed materials, and recruits a facilitator. Both work together the day of the event to facilitate the workshop.

- We currently offer workshops for earning the Engineering Day fun patch and the OC council-specific STEMsational Me! Badge. In the past, we have offered our own SWE Engineering Day badge.

## RESPONSIBILITIES

- The Girl Scout chairperson or co-chairs is/are responsible for organizing (or delegating) all aspects of this event.

### Organizing the Event:

- Find a location to host it
  - Should be large enough to accommodate 80 – 85 people.
  - The size of the registration you expect will depend on the size of the location you select.
  - Ask SWE officers for input on locations
  - The location should have electrical capabilities. SWE OC owns a projector and projector screen.
  - Coordinate with site security as necessary
- Set Date and Time for the Event (**Typically you want to schedule this at least 2 - 4 months in advance.** You may also want to consult the girl scout calendar as to avoid other big events <http://www.gscoc.org/calendar.aspx>)
- Set Registration Limit – remember to include the # of volunteers and parents that might attend. (1 volunteer per 6 girls and 1 parent per troop)
- Revise advertisement flyer with new date, time, location, and RSVP information.
- Create an Eventbrite page for the event on the SWE OC eventbrite account. You can easily make the flyer the event picture.
- Send flyer to GS council(Typically you want to advertise this at least 1 ½ months in advance) ([bjwatanabe@gscoc.org](mailto:bjwatanabe@gscoc.org))
- Advertise the event on facebook. Link the Eventbrite page where attendees can sign up.
- RSVPs are taken on a first come first served basis. Confirmation is confirmed when checks are received.
- We do not have to charge for the workshop, SWE-OC has funds to cover it; however, charging a nominal fee ~ \$3 per girl ensures that people show up for the event.
- Send a request for SWE-OC volunteers. Have the president add it to the weekly email and send it to the Newsletter Article. The flyer for the event can also be included.
  - SWE volunteers must now be pre-screened Girl Scout volunteers. Submit a reimbursement to SWE for the \$15 fee. Instructions are as follows:
  - To register as a GS member, [click here](#).
    - Complete the first ‘Adult Registration’ page
    - On the next page ‘Select a Volunteer Role’, in the **Troop # field, enter ‘Event Volunteer’ and zip code 92618**
    - After hitting ‘search’, the next screen will show the ‘search results’ toward the bottom of the page
    - Select ‘event volunteer’, click on the green ‘next’ button that will appear.

- Complete registration, which is \$15 per year.
- An email will be sent to you within a few minutes with a link to start the background screening process. This will come from our screening company, Asurint.
  - Please check your spam folder if you don't get this in a few minutes.
- Send an email confirmation of registration to everyone who signed up about 2 weeks prior to the event. Include directions to the location and make sure they know the event will start promptly at the time you specified on the flyer
- Buy snacks and drink boxes for the girls to eat half way through the event. This helps to streamline the day.
- Send out volunteer instructions about a week before the event. Let them know what time they should arrive, agenda for the event, and the checklist that the girls will have to complete. Ask them to come early to meet with the workshop leads to discuss the workshop (recommend providing juice and donuts/bagels).

#### **Event Materials Preparation:**

- Make any updates to the agenda, checklist, preparation, etc
- Find out what the registration total is one week in advance
- Order printouts, make sure you have enough materials, etc
- Notify site security
- Plan seating and breakouts with volunteers
- Get prizes to award for the balsa glider contest. Ask member of SWE-OC if they can get give-aways from their company.
- Buy folders, if needed, to put all the girls materials in.
- Make copies of all the handouts and assemble folders
- Buy or get balsa gliders. In the past Parker Aerospace has donated. Ask Executive Committee for contact at Parker to request gliders (Try to do this about a month before the event to give them enough time to provide them)
- Gliders can also be purchased at at amazon.com. The most cost effective found is here: [http://www.amazon.com/Balsa-Wood-Glider-Model-Plane-Pack/dp/B000HIYQL4/ref=sr\\_1\\_1?ie=UTF8&s=toys-and-games&qid=1283723711&sr=8-1](http://www.amazon.com/Balsa-Wood-Glider-Model-Plane-Pack/dp/B000HIYQL4/ref=sr_1_1?ie=UTF8&s=toys-and-games&qid=1283723711&sr=8-1). Recommended to order 1-2 weeks in advance.
- Make sure you have all the materials you need for the event – See event checklist.
- Double check the equipment, internet, and room setup the night before or earlier in the morning.
- All materials are located on a Special Yahoo Groups website. Shannon Pollock is the administrator. Access can be requested through her. [shannonpollock@verizon.net](mailto:shannonpollock@verizon.net)

#### **RESOURCES**

- Girl Scout Calendar - <https://www.girlscoutsoc.org/en/events/event-calendar.html>
  - Use this calendar to find other events that the Girl Scouts may need SWE assistance with, such as the STEM Expo typically held in October/November each year.
- Girl Scout Contact Information - [LChilders@girlscoutsoc.org](mailto:LChilders@girlscoutsoc.org)
- Google Group

- Order SWE badges from <https://www.abdi-ecommerce.com/swe/c-6-gir-scout-badges.aspx>
- Flyer

## 6.2 K-12 OUTREACH CHAIR (PREVIOUSLY SPEAKER'S BUREAU)

### DESCRIPTION

Finding or taking requests for speakers from local schools and setting up a speaker(s) to go to that school. We have a presentation several activities which were designed to be presented at a local elementary, middle or high school.

### RESPONSIBILITIES

- Be the contact person for requests from local K-12 schools who would like a speaker to come to their classroom.
- Provide input to the Outreach Chair in September and January for the Outreach Newsletter.
- As necessary, advertise the speaking opportunities to solicit volunteers. (Send to president for inclusion in weekly emails, newsletter, email can be sent stand alone to section—coordinate with EC to send)
- Find SWE-OC members who are willing to volunteer to present at local elementary, middle and high schools
- Forward teacher contact information to the Outreach Chair for inclusion in the Outreach Contact database
- Additional events and involvement opportunities include:
  - FIRST CA, the OC regional robotics competition takes place each spring (March/April) and has a “Women in STEM” event. This event is typically held at the OC Fair Grounds. Contact Deborah Dragon, FIRST Regional Director, Southern California, [ddragon@firstinspires.org](mailto:ddragon@firstinspires.org)
  - The Orange County Science Fair needs judges! <http://ocsef.org/index.php>

## 6.3 CERTIFICATE OF MERIT CHAIR

### DESCRIPTION

- SWE Certificate of Merit is presented to high school girls who have completed three years of science and three years of mathematics with distinction.
- A Certificate of Achievement may be awarded to a high school junior or senior who has not completed three years of science and mathematics but has achieved excellence in a related activity such as a science fair, math contest, etc.
- Awards should be distributed in person; however, if this is not feasible, the award can be sent to the school
- Award can be merely a certificate or can also include a monetary prize also. Discuss funding with Executive Committee
- Deadline for submission May 4th



**RESPONSIBILITIES**

<b>Timeframe</b>	<b>Task</b>	<b>Resource</b>
January	Submit an article to the Newsletter advertising Certificate of Merit nominations are open	Example Newsletter Article Vice President / Outreach / Certificate of Merit / SWE-OC Certificate of Merit Article Example
January	Include information in the Outreach Newsletter for Certificate of Merit	
February	Send high school teachers in the Outreach Contact database the Certificate of Merit Nomination form and instructions to solicit nominees	Cert of Merit nomination form and instructions
Feb – May	Collect Nominations	
April	Send follow up email to teachers to solicit nominations	
May 4 <sup>th</sup>	Deadline for nominations	
May 4 <sup>th</sup>	Contact recipients immediately and invite them to the Recognition Dinner to receive their certificate. We usually sponsor the awardees attendance to this event. If award recipient cannot attend, make arrangements to mail it to them.	
May	Print Certificates and purchase gifts. Note: Gift purchase should be coordinated with the EC to determine budget	Example Certificate Vice President / Outreach / Certificate of Merit
Ongoing	Send any teacher contact information to the Outreach chair to add to the Outreach Contact database	

## 7.0 COLLEGIATE RELATIONS CHAIR

### DESCRIPTION

- Oversee the Scholarships and Counselor Chairs.
- Ensure that region and section communication reaches the collegiate sections.
- Coordinate with CLCC to schedule semi annual leadership training.

### 7.1 SCHOLARSHIPS CHAIR

#### DESCRIPTION

- SWE-OC awards at least one scholarship every year to an engineering student from one of the local colleges/universities that we support.
- In FY21, we offered 1 Endowed scholarship of \$1000 to a high school senior, 3 Undergraduate scholarships (1st place - \$1500, 2nd place - \$1000, 3rd place - \$500), and 3 Graduate scholarships (1st place - \$1500, 2nd place - \$1000, 3rd place - \$500). However, we only received 2 eligible applications for Undergraduate scholarships, so we shifted the 3rd place award to provide a 4th place \$500 scholarship to an extra graduate student.
- The Endowed scholarship is an annual \$1000 scholarship for one Orange County high school senior planning to pursue engineering in college for the Fall semester of that year. This is through a fund for our local section, held by SWE HQ.
- The scholarships are intended for use for the Fall semester of the year it is awarded, so students who are graduating but are not going on for further education in the Fall are not eligible. **Recommend including this in our future scholarship application information.**

#### RESPONSIBILITIES

Timeframe	Task	Resource
July	<ul style="list-style-type: none"> <li>• Set scholarship amounts at Planning Retreat</li> </ul>	Scholarship documents are in the Scholarships SWE-OC Google Drive account. (Email: scholarship@swe-oc.org password: vP&1R1Tl)
Sept / Oct	<ul style="list-style-type: none"> <li>• Advertise the Scholarship Program at the Fall Collegiate Section Training</li> <li>• Discuss the requirements and explain the scoring</li> <li>• Inform them the scholarship form will be available December 1<sup>st</sup></li> <li>• Inform students about the National Scholarships that are offered open in</li> </ul>	Score Sheet

	December. Visit <a href="http://www.swe.org">www.swe.org</a> and click on Scholarships	
November	<ul style="list-style-type: none"> <li>Update the Scholarship forms in Kaleidoscope for the new fiscal year</li> <li>Recommend asking Kaleidoscope to add a “biography” field for each application</li> <li>Would like for the form to be a google form for easy submittal</li> </ul>	Scholarship Form
December	<ul style="list-style-type: none"> <li>Send out Scholarship link in Kaleidoscope to Collegiate Section Liaison, Counselors, Section Presidents</li> <li>Share scholarship link and updated application information on SWE-OC webpage to webmaster</li> </ul>	
December	<ul style="list-style-type: none"> <li>Include announcement about Scholarship Form availability in next Section newsletter and weekly emails</li> </ul>	
February	<ul style="list-style-type: none"> <li>Send reminder to Collegiate Section Liaison, Counselors, Section Presidents about upcoming scholarship due date</li> <li>Solicit volunteers to judge the scholarship. 4-6 judges seemed to be a good number for 15-20 applications. Can divide up by scholarship program. (It took about 4-5 hours to judge about 15 applications.)</li> </ul>	
March	<ul style="list-style-type: none"> <li>Send reminders to schools 1-2 weeks before the deadline</li> <li>Scholarship Deadline March 15</li> </ul>	
April	<ul style="list-style-type: none"> <li>Complete judging by mid-April.</li> <li>Ask Kaleidoscope to pull score reports by April 23. See if they can also pull email address, mailing address, and school names. See example excel form from FY21 summary of scholarships.</li> <li>Update scholarship applications if needed (score sheet is in the Kaleidoscope website and google drive - see FY21 folder for example)</li> <li>Invite winners to the May Awards and Recognition Banquet, and request bio (if not in Kaleidoscope) and picture (optional)</li> </ul>	Score Sheet
May	<ul style="list-style-type: none"> <li>Request Checks from the Treasurer and names to banquet coordinator for program</li> </ul>	Scholarship Certificate Form

	<ul style="list-style-type: none"> <li>• Work with End of Year Banquet chair to put together slides for award recipients with their bios and photos.</li> <li>• Get electronic code from banquet coordinator (tickets free for awardees)</li> <li>• Print Certificates (see example in FY21 folder with mail merge template and example excel form)</li> <li>• If scholarship donation was made by a particular company, make sure the certificate reflects the company that donated it</li> <li>• For in-person recognition dinner, company sponsoring scholarship(s) are invited and informed of the winner's name and contact information. <i>(For FY20 and FY21 virtual banquets, we did not do this.)</i></li> <li>• Provide the recipients with the company contact information so that they may send a thank you note</li> <li>• <b>Endowed Scholarship</b> - need to send award recipient information and "bursar address" by mid-June (see email for specific date) to <a href="mailto:Rosalie.Kapanga@swe.org">Rosalie.Kapanga@swe.org</a> and <a href="mailto:scholarships@swe.org">scholarships@swe.org</a> (school address for sending outside scholarships to). The check is sent to the award recipient's school. See example email sent to Rosalie in <a href="mailto:scholarship@swe-oc.org">scholarship@swe-oc.org</a> email on 05/14/2021 .</li> </ul>	
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## 7.2 COLLEGIATE COUNSELORS

### DESCRIPTION

Every SWE student section is required, by SWE Headquarters, to have a counselor who is a member of a local SWE member section (and in good standing). We have counselors for the following campuses

- Cal Baptist University
- Chaffey College
- CSU Fullerton
- CSU Long Beach
- Cypress College

- Santa Ana College
- UC Irvine
- UC Riverside

## RESPONSIBILITIES

- To serve as a source of information about SWE and its goals
- Participate in Society Counselor's teleconferences
- To serve as a liaison between local SWE member sections and the student section and encourage the students to be active with their local SWE members and the industry
- To provide advice and suggestions for student section activities
- To provide contacts for speakers, plant tours and other areas of interest from the local industry
- To review and sign the Annual and Financial Report for the Student Section
- To attend student section meetings and special events when possible
- Most of the time commitment is spent reminding the students of upcoming events within the SWE member sections and Headquarters. This can be completed by either making phone calls to the section contacts or through email, or the best method of communication.
- It is suggested that the counselor meet with the section executive board members before the semester begins. This is an opportunity to determine the section's goals and primary objectives for the semester/year, plan events, as well as to serve as a "group bonding" time which is necessary for them to work well together.
- The student section counselor must keep in good contact with the member section Student Liaison. The Student Liaison reports to the section executive board on the activities of the local student sections. The Student Liaison will also organize events for all the local student sections, which the counselor must then inform the students about and try to support.
- Outstanding Student Section Award Nominations must be postmarked by May 31<sup>st</sup> and a copy sent to Region Student Coordinator and to SWE Headquarters. Additional copies may be needed.
- Student Section Financial Reports must be postmarked by July 30<sup>th</sup> and again a copy sent to Region Student Coordinator and to SWE Headquarters.
- Student Section Annual Reports must be postmarked by June 30<sup>th</sup>. Both the student section President and the Counselor must sign these reports. Two copies must be submitted: one to the Region Student Coordinator and one to Headquarters.
- SWE-OC also gives out scholarships, which are due March 30th. You should encourage the students to apply