

Roles & Responsibilities

Senior Chapter Chair

JOB DESCRIPTION

As chair of your SME senior chapter, you have been called on to lead, motivate, organize, build enthusiasm and bring manufacturing together...locally. Your responsibilities are many, and much support is available to you. SME Headquarters works to assist you in your endeavors by providing you with tips and tools as you fulfill this critical—and valued—task.

RESPONSIBILITIES

- Recruit members to your chapter to expand your size and influence
- Retain members by encouraging and promoting their involvement, and reminding them when they are up for renewals
- Develop and schedule chapter events and programs (no fewer than four meetings or technical tours per year)
- Communicate regularly with SME members through chapter meetings and through your chapter's print and electronic communications vehicles
- Provide training to chapter officials and representatives
- Appoint members to the Honor Awards Committee
- Appoint a chapter Certification Chair
- Preside over all official chapter functions according to the SME [Governance Document](#)
- Counsel and advise chapter administrative committees
- Ensure that all chapter officials and committees can handle their responsibilities and that all required documents are completed and submitted on schedule
- Oversee the Nominating Committee functions
- Ensure the chapter is well-represented at a minimum of one SME Professional Development Conference each year
- Communicate often with [your member & industry relations manager and/or membership consultant](#), sharing ideas and generating solutions to problems

Documents You are Responsible For		
Name	Purpose	Annual Due Date
Chapter Officer Listing (MS Word)	To assist you in proactive communications, this document lists all current officers and their contact information.	January 31, annually
Chapter Financial Report (MS Excel)	Completed by the chapter treasurer, this report includes all assets and liabilities of the chapter. SME Headquarters needs this report so it can file a joint tax return in April of each year and avoid an IRS audit.	January 31, annually
Chapter Planning and Assessment Guide (MS Excel)	This guide is designed to assist chapter leaders in the effective planning and assessment of their chapters' effectiveness as it relates to meeting members' needs. It includes suggestions for beneficial activities.	January 31, annually

QUICK TIPS

- Become familiar with each of your chapter's leadership [roles and responsibilities](#)
- Ask each elected officer to provide you with periodic reports detailing activities, programs and actions taken by either their committees or by the general membership
- Become familiar with the [Volunteer Leaders' Toolkit](#). There you will find an array of helpful tools and "must-know"

information.

- Take time to study the SME [Governance Document](#). This information will be helpful when you are called upon to answer policy and procedure questions. Print this document so you can take it to all meetings for easy reference.
- Call your chapter's Membership Consultant whenever you need additional assistance or further information. If you don't know who your Membership Consultant is or how to reach him/her, call 800.733.4763 and speak to a Customer Care representative.

TAXING ISSUES: YOUR CHAPTER & THE IRS

Tax Identification Numbers

All SME senior chapters (U.S. only) are required to obtain a Tax Identification Number (TIN) from the IRS. If you need a TIN, obtain a number by filing [form SS-4](#) with the IRS.

Annual Tax Filing

Each chapter's financial report is due to SME Headquarters (Member Services) on January 31. This report is used by SME to file a consolidated federal tax return for all domestic chapters. Failure to submit your chapter's financial information will result in the suspension of funding from Headquarters and could result in an IRS audit for your chapter.

Record Keeping: What to Keep on File

Annual financial report and Executive Committee meeting minutes must be kept on file by the chapter for seven years, both for reference and in case of an IRS audit.

Additionally, all chapters are required to keep track of their own valuable historical documents and photography. This information could be useful to future chapter officers and members.

TAKING CARE: LIABILITY INSURANCE FOR YOUR EVENTS

North American Chapters

Personal injury liability insurance, secured and maintained by SME Headquarters, covers the activities of senior, student and forming chapters in North America. Covered activities include:

- Regularly scheduled meetings
- Plant tours
- Picnics, golf outings and dinner parties

You can determine if special coverage is needed for chapter activities by referring to the SME [Governance Document](#).

Worldwide Chapters

SME also makes liability insurance coverage available to all of its chapters outside North America. Contact [Customer Care](#) for information about securing such coverage for your events.

OFFICER TRAINING: KEEP YOUR OPERATIONS ROLLING

Ensuring adequate training for all of your chapter's officers is easy. The coordinated efforts of SME members and Headquarters staff have resulted in the development of training materials and specialized training sessions that are held quarterly, associated with major conferences and events. [Your member & industry relations manager and/or membership consultant](#) can provide more information upon request.

RECRUITMENT: BRING LOCAL MANUFACTURING TOGETHER

New member growth plays a vital role in SME's future. Chapter leaders can contribute to this goal by encouraging their members to "spread the word" to nonmember colleagues and recruiting them as new members. This helps strengthen their own ranks and to enhance worldwide membership resources. SME recognizes and rewards both senior-level and student members who recruit and sponsor their colleagues through programs that include:

- **SME President's Circle Recognition Program:** This program recognizes the recruitment successes of individual senior

and student members over a one-year period.

- **Chapter Challenge Chapter Recognition Program:** These seasonal campaigns recognize both senior-level and student chapters for their part in new member growth and existing member renewals.
- **Seasonal Recruiter (Member-Get-a-Member) Program:** These seasonal campaigns recognize and provide incentive awards for senior and student members active in new member recruitment.

See the [recruitment](#) and [retention leaders'](#) roles and responsibilities pages for more information.

PARTNERSHIPS: STRENGTH IN NUMBERS

Working with a nearby student or senior chapter can help you strengthen your chapter and engage members. Partnering or cosponsoring events allows chapters to present more interesting offerings to their members and provides benefits including two-times the promotion for every cosponsored event! Chapters that partner with one another find they often have higher participation rates and significantly greater satisfaction levels among members. In addition to cohosting chapter meetings and technical tours and activities, you can work with other chapters to represent SME at a local trade show, cosponsor certification classes and examinations, offer pertinent training sessions and create forums on topics of local or regional manufacturing relevance. It all starts with a phone call to a nearby chapter chair. See the [SME Chapters](#) listings to find chapter chairs' names.

MARKETING STANDARDS: USING SME LOGO

SME encourages you to publicize your affiliation with the Society by proudly displaying its widely recognized logo — within guidelines:

- Only chapters may sell or give away items emblazoned with the SME logo
- Logo t-shirts, plaques, jewelry, etc., may not be marketed by commercial enterprises on the chapter's behalf
- All logo usage must comply with the SME [Logo Standards](#) (PDF)
- Use of the logo along with any company name or logo is strictly prohibited, even if the company is an affiliate member of SME
- Download logos and obtain style guidelines from the [Volunteer Leader Toolkit](#)

PRESIDENT'S AWARD: HONOR OUTSTANDING CONTRIBUTIONS

As the chapter's highest and most prestigious award, The President's Award honors one person who has made an outstanding contribution to the management of chapter activities during the past year. SME announces the availability of President's Award by e-mail communication to the chapter chair. Each chapter is entitled to receive one award for presentation to its local winner at no cost upon request, providing the request is made by the established due date. Additional awards can be purchased.