



New Section Guidelines

The SWE chartering process is one that each proposed section must go through to become a nationally recognized SWE section. This document briefly describes the tasks SWE Headquarters, the New Section Coordinator, and the proposed section are performing simultaneously when a proposed section goes through the chartering process.

STEP 1: SWE HEADQUARTERS IS CONTACTED BY INDIVIDUAL OR GROUP INTERESTED IN STARTING A NEW SWE SECTION

- SWE Headquarters (HQ) will contact New Section Coordinator.
- New Section Coordinator contacts proposed section's contact person.
- HQ mails a New Section Packet to the proposed section.
- Proposed section receives and reads the New Section Packet.
- Proposed section contacts New Section Coordinator with questions.
- ZIP Code Coordinator provides preliminary recommendations for the proposed section.

STEP 2: PROPOSED SECTION DETERMINES IF SWE IS NEEDED IN AREA

- Search the SWE Member Directory for other SWE members in your area at www.swe.org.
- Contact other SWE members and other women engineers in your area.
- Set a meeting date to informally discuss if creating a SWE section in your area is something others would like to pursue.
- Determine proposed section's goals.
- Establish a regular meeting schedule and test the area to see if people will attend meetings.
- Gather data on engineering employers in the area and see if they are willing to distribute information to women engineering employees.
- Check to see if there are SWE student sections in the area and determine how a professional SWE section would benefit them.
- Determine how other organizations (i.e. Girl Scouts, local engineering council, school districts) would benefit from a SWE section.
- Contact other engineering and technical organizations in the area and begin networking with them and sharing meeting ideas.

STEP 3: PROPOSED SECTION BEGINS CHARTERING PROCESS

Tasks for the Proposed Section:

12 Months Prior to Board of Directors (BOD) Meeting

- Hold regularly scheduled meetings/activities for approximately one year.
- Conduct career guidance activities (i.e. Girl Scout badge workshops, speak to school kids about engineering, take a child to work day).
- Gain at least ten paid members.
- Finalize geographical area of proposed section with the ZIP Code Coordinator.
- Contact New Section Coordinator, Region Director, and parent section (section or MAL, as applicable) with an update.
- Attend Regional and National conference if possible.



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6 Months Prior to BOD Meeting

- ❑ Select a name for your proposed section that represents your nationally known geographical area - make sure “proposed” is in the title.
- ❑ Create a logo for the proposed section if desired - make sure “proposed” is in the title.
- ❑ Establish a newsletter for the proposed section.
- ❑ Create a website for your proposed section and have it linked to the Regional website.
- ❑ Review the most recent Standard Section Bylaws from the New Section Formation Packet (or download from <http://www.swe.org/SWE/secretary/bylaws.htm>) and determine if the section will need to amend these bylaws following charter approval.
- ❑ Determine the proposed section’s executive board.
 - President.
 - Vice President.
 - Secretary.
 - Treasurer.
 - Section Representative.
- ❑ Continue to gain at least ten paid members.
- ❑ Verify the BOD meeting date you wish to have your charter approved on.
- ❑ Contact New Section Coordinator, Region Director, and parent section (section or MAL, as applicable) with an update.

3 Months Prior to BOD Meeting

- ❑ Begin creating the Petition to Charter Packet.
 - Complete the Petition to Charter Form.
 - Write the Petition to Charter Supporting Information document.
 - Obtain ZIP code release, treasury division agreement, and statement assuring viability of the existing section if proposed section is forming from an existing SWE section.
- ❑ Contact New Section Coordinator, Region Director, and parent section (section or MAL, as applicable) with an update.

6 Weeks Prior to BOD Meeting

- ❑ Mail the original Petition to Charter Packet to HQ.
- ❑ Mail one copy of Petition to Charter Packet to New Section Coordinator.
- ❑ Keep one copy of the Petition to Charter Packet for the section’s files.

Tasks for the New Section Coordinator:

After receiving the Petition to Charter Packet - 1 Month Prior to BOD Meeting

- ❑ Obtain membership reports generated by the Membership Director at HQ according to the New Section Membership Director Checklist.
- ❑ Review packet according to the New Section Coordinator Checklist.
- ❑ Contact the proposed section with questions or concerns about packet.
- ❑ Write and submit the motion that appears on the BOD’s meeting agenda to the Membership Committee Chair.
- ❑ Contact proposed section, Region Director, and parent section (section of MAL, as appropriate) with an update.



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STEP 4:

BOD APPROVES PROPOSED SECTION'S CHARTER

Tasks for New Section Coordinator:

- ❑ New Section Coordinator will contact proposed section to inform them with the good news.
- ❑ New Section Coordinator will continue to mentor the new section for two years to help section become established and to answer questions.

Tasks for SWE HQ:

- ❑ HQ will transfer and notify all members as applicable to the new section.
- ❑ HQ will mail the SWE Section Charter, membership reports, check for \$200 if applicable, and other materials such as the Section Manual to the section president.
- ❑ HQ will place the new section on SWE's official member roster.
- ❑ HQ will complete the Membership Director Checklist.

Tasks for New SWE Section:

- ❑ Remove the word "proposed" from title of section.
- ❑ Continue holding regularly scheduled meetings.
- ❑ Complete and submit the IRS SS-4 form to the Internal Revenue Service to obtain an Employer Identification Number (EIN). The SS-4 form can be downloaded from www.swe.org/SWE/Treasurer/finance.html. Use the "Exempt Organizations" instructions found at this link www.irs.gov/businesses/small/article/0,,id=99225,00.html.
- ❑ Complete and submit the Request of Addition to the Group Tax Exemption Form to SWE after receiving the EIN. The form can be downloaded from www.swe.org/SWE/Treasurer/finance.html.
- ❑ Determine who should have access to accounts and set up accounts with local financial institution.
- ❑ Review and become familiar with the SWE Finance Manual on www.swe.org/SWE/Treasurer/finance.html.
- ❑ Begin planning your section's charter banquet.
 - Consider inviting your state's Congressmen, area company CEOs, SWE National President, SWE BOD, Region Director, neighboring SWE sections, student SWE sections, and your SWE members.
 - Consider asking area companies for support and sponsorship of your charter banquet.
 - Determine who from SWE will formally present the charter at the banquet.
- ❑ Write a press release announcing the new section and submit to the area newspaper, SWE Magazine, Region newsletter, and other possible publication sources.
- ❑ Organize and conduct training session for new members, officer, and committee chairs using the Section Vitality program.
- ❑ Review section goal and revise if necessary.
- ❑ Continue to solicit new members.
- ❑ Contact New Section Coordinator if any questions arise.



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STEP 5:

REQUIREMENTS ALL SECTION ARE REQUIRED TO FULFILL ANNUALLY

- Must have at least ten paid members.*
- Must elect officers in accordance with section bylaws.*
- Must submit three quarterly section updates to Region Director.
- Must submit final year in review update to Region Director and to SWE HQ as specified by the Region Director.
- Must submit year-end financial statement to Region Director and to SWE HQ by July 30. The form to fill out is located on www.swe.org/SWE/Treasurer/finance.html.
- Must attend Council of Representative (COR) meetings and vote on a majority of all the COR mail ballots.*
- Must file financial report with HQ for the previous fiscal year, report its EIN to SWE, and either the president or treasurer must be paid members to receive the semi-annual rebate check.
- Must submit the year-end financial statement to be eligible for following year's biannual dues rebates from HQ.
 - During the first year, a section will receive dues rebates from HQ without having to file the financial report since the section did not exist the previous year.
- Amend the Standard Section Bylaws if desired.
- * A section may be declared inactive if it fails to meet any or all of the requirements (marked above with *) for more than two consecutive years.

When questions come up concerning the chartering process please contact one of the following for help:

- New Section Coordinator
- ZIP Code Coordinator
- Membership Committee Chair
- Region Director
- Visit SWE Website www.swe.org
- SWE HQ

When question come up concerning completing the tax exemption forms please contact one of the following for help:

- New Section Coordinator
- Finance Committee Chair