

# Event Programming

March 3–5, 2011

Hyatt Regency DFW  
Dallas, Texas



## *2011 Leadership Training Conference*

Presented By:

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[blockerv2@asme.org](mailto:blockerv2@asme.org)

### **ASME 101 Session IVA Tools and Fundamentals Part II**

### ***Programming Basics – Sections & Affinity Groups***

Hand Out Attachments:

- Priorities Breakdown
- Programming Cycle
- Event Planner Template
- Budget Tracking Template
- ASME Merit Funding Form
- Sample Event Follow Up Survey
- International Section Program Ideas/Challenges

## ASME Organization

Vision: ASME will be the *essential resource* for mechanical engineers and other technical professionals throughout the world for solutions that benefit humankind.

Mission: To *serve* our diverse global communities by advancing, disseminating and applying engineering knowledge for improving the quality of life; and communicating the excitement of engineering.

## ASME Strategic Priorities

- Energy - ASME will serve as an essential energy technology resource and leading advocate for balanced energy policies.
- Globalization - ASME will deliver locally relevant engineering resources to advance public safety and quality of life throughout the world.
- Engineering Workforce Development - ASME will achieve a broader, competent, vibrant and more diverse engineering workforce for all career stages.

## ASME Knowledge & Communities (K&C)

### K&C Priorities

- Attract and retain students and early career engineers
- Balance the volunteer workload
- Reduce K&C's operating subsidy
- Improve communication effectiveness
- Make it easier for members to access ASME products and services.

## Board on Programs and Activities

Vision: That all units of ASME's Knowledge and Community Sector (and of other Sectors as appropriate) regularly provide a range of programs and activities that *engage* and *support* ASME members, and thereby encourage members to remain with ASME and become more involved.

## ASME LTC-10 Objective

- "Advancing Skills for Leadership Challenges ... And Inspiring Others to Make a Difference"
- 2010 Leadership Training Conference purpose is to provide ASME unit leaders and key committee personnel with an opportunity to learn crucial skills and network with other units important to the successful operation of the Society.

## Event Programming 101 Objectives

- Understand the importance of unit programs
- Be able to create a vision for program planning based on your unit's needs, priorities and demographics
- Be familiar the essentials of effective programming and the programming cycle
- Gain ideas of various types of programs that might be appropriate for your unit

## Motivation for Programming

- Programs are a way through which ASME units can be an *essential resource* to the global communities.
- Delivering quality programs is a way ASME units can *serve* the global communities.
- Programs are a way ASME units can communicate *strategic priorities* to the global communities.

# Programming Cycle



# Future Programs

Technical Meetings

Site Tours

Networking Events

Fundraising Activities

Government Relations Activities

K-12 Events

Early Career Activities

Community Outreach

Webinars

For more information regarding web-based meetings, webinars and how they can help you better serve your section contact:

Scott Burr, [burrs@asme.org](mailto:burrs@asme.org)

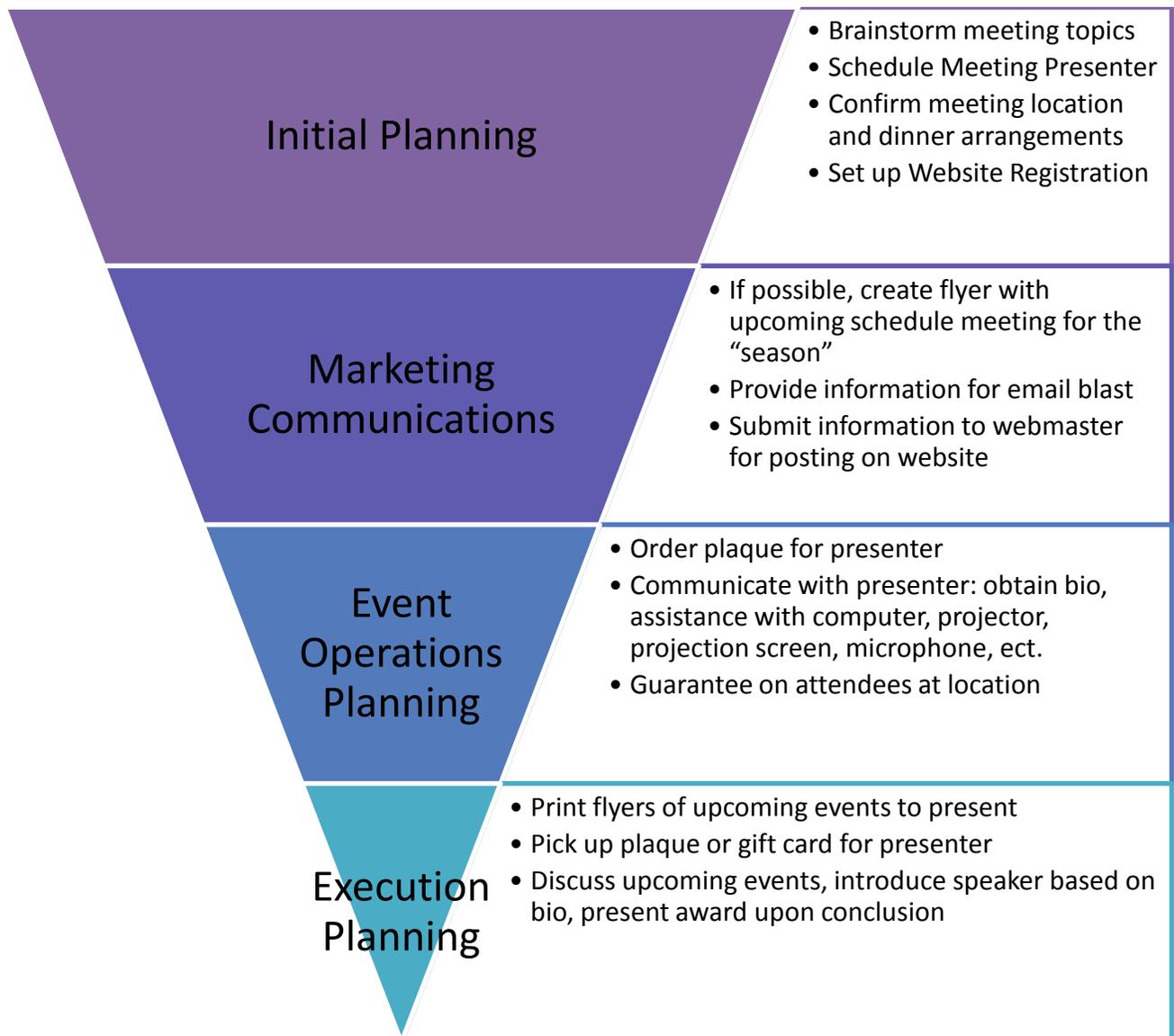
503-723-7392

Local Programs Committee Chair

Santa Clara Valley Section Professional Development Chair

District D Professional Development Chair

# Reverse Pyramid Checklist



# ASME Event Planning Template - 2011

Tasks scheduled for:

Enter the task information below and highlight the cells on the calendar below.

Task	Starting	Ending	Task	Starting	Ending

**January**

S	M	T	W	TH	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

**February**

S	M	T	W	TH	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

**March**

S	M	T	W	TH	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

**April**

S	M	T	W	TH	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

**May**

S	M	T	W	TH	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

**June**

S	M	T	W	TH	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

**July**

S	M	T	W	TH	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

**August**

S	M	T	W	TH	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

**September**

S	M	T	W	TH	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

**October**

S	M	T	W	TH	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

**November**

S	M	T	W	TH	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

**December**

S	M	T	W	TH	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

# ASME Programming Event Budget Template

MONTH \_\_\_\_\_ YEAR \_\_\_\_\_ Dates from \_\_\_\_\_ to \_\_\_\_\_ Unit \_\_\_\_\_

INCOME		EXPENSES	
Event 1			
Description	Amount	Description	Amount
Total		Total	
Event 2			
Total		Total	
Event 3			
Total		Total	
Event 4			
Total		Total	
<b>Income Total</b>		<b>Expense Total</b>	
		<b>Ending Balance</b>	

# ASME Section Merit Based Funding Form Program year 20XX – 20XX

Section Name: \_\_\_\_\_

Date: \_\_\_\_\_

Submitted By: \_\_\_\_\_

Position \_\_\_\_\_

Email: \_\_\_\_\_

**Mandatory Pre-requisites:**

In order to qualify for funding, each Section must have submitted the required Annual Financial Report, Operations Budget Report, and this form between July 1<sup>st</sup> and no later than October 1<sup>st</sup> of the current program year. A current list of section officers must also be on file with ASME. The second page provides the necessary instructions.

**Item 1 Section Communications**

**Grade Weight Score**

Maintain a website with up-to-date officer contact information  
 Maintain regular communications (newsletters to members via website, US Mail, or email.

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**Item 2 Section Activities for Members**

**Grade Weight Score**

General meetings (tours, technical presentations, social outings, and etc.  
 File "Unit After Activity Reports"  
 Co-sponsor activities with other technical and local organizations

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**Item 3 Provide Opportunities for Members' Professional Growth<sup>(1)</sup>**

**Grade Weight Score**

Sponsor or Conduct short course or PE refresher course  
 Members submitted for ASME District or higher Honors and Awards  
 Bestow local Honors and Awards on members (Young Engineer Award, etc.)

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**Item 4 Aid in the Development of the Engineering Profession<sup>(1)</sup>**

**Grade Weight Score**

Hold membership recruiting or retention activity  
 Hold industry breakfast or lunch, present Industry Relations ASME award  
 Host Student Competition or get Students to attend section meetings  
 Financial contribution to ME students, Universities or K-12 schools promoting math / science education  
 Participation in engineering job shadowing / mentoring program, or Engineering Fairs / Symposium  
 Support Local Government body with engineering/technical related topics

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**Item 5 Section Operations**

**Grade Weight Score**

Executive committee planning meetings held  
 Conduct 15 min. member benefits program at section meeting  
 Update Chapter History  
 Officers Elected, reported and Coded with ASME by June 30<sup>th</sup> deadline

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**<sup>(1)</sup>For items 3 and 4 list courses offered, honors/awards bestowed and applied activities. Attach a separate sheet if necessary.**

\_\_\_\_\_

**Grade x weight = Score      Add Scores From all 5 Items      Total Score \_\_\_\_\_**

**Significant Section Activities Not Covered Above:**

Not all section activities can be captured by a single form. If your section has done an activity or program above and beyond normal programming please describe it for special consideration. Districts can provide "Bonus Funding" for Section Ideas deemed worthy of sharing with other Sections or Districts.

**Please attach a separate explanation of any significant activities, with sufficient detail for an independent evaluation of the program.**

# ASME Section Merit Based Funding Form Instructions

This is a Section self-evaluation form that will be used for providing merit based funding to the local section. Please complete this form accurately and honestly as it will be used to evaluate how well you are providing services to your local members. All scoring should be based on Section activities from July 1 – June 30 of the previous program year. Take note of items for which your section can improve performance based on the past year's activities and incorporate activities for next year to improve these scores. The mandatory prerequisites must be completed and this form must be turned in no later than October 1<sup>st</sup> by Sections requesting merit based funding.

## **Item 1 Section Communications**

Maintain a website with up-to-date officer contact information

Maintain regular communications with members: newsletters/meeting notices via website, US Mail, or email.

**Performance Grading Scale:** Section grade based on numbers in left column.

- 1 = No current website, no section notices to members.
- 2 = No current website, and at least 2 newsletter communicated.
- 3 = Updated Section website on ASME.org, and 1 or 2 newsletters communicated.
- 4 = Updated Section website on ASME.org, and 3 or 4 newsletters communicated.
- 5 = Updated Section website on ASME.org, and 5 or more newsletters communicated.

## **Item 2 Section Activities for Members**

General meetings held and [ASME Unit "After" Activity Report](#) submitted

**Performance Grading Scale:** Section grade based on numbers in left column.

- 1 = No activity reports submitted.
- 2 = 1 or 2 Activity reports submitted.
- 3 = 3 or 4 Activity reports submitted.
- 4 = 5 Activity reports submitted.
- 5 = 6 or more Activity reports submitted.

## **Item 3 Provide Opportunities for Members' Professional Growth**

Sponsor or Conduct short course or PE refresher course

Members submitted for ASME District or higher Honors and Awards

Bestow local Honors and Awards on members (Young Engineer Award, etc.)

**Performance Grading Scale:** Section grade based on numbers in left column.

- 1 = No courses and no member submitted for or bestowed an honor or award
- 2 = No courses but at least 1 member submitted for or bestowed an honor or award at local, District or higher level
- 3 = 1 short course (minimum 2 PDH) offered **and** at least 1 member bestowed a local section honor or award
- 4 = 1 short course (minimum 4 PDH) offered **and** 1 or more members submitted for District or higher honor or award
- 5 = 2 or more courses offered (minimum 8 PDH total) **plus** 1 or more member submitted for District or higher award **and** 1 or more member bestowed a local honor or award

## **Item 4 Aid in the Development of the Engineering Profession**

Hold membership recruiting or retention campaign

Hold industry breakfast or lunch, present Industry Relations ASME award

Contribution of \$300 or more to ME students, Universities, or K-12 schools promoting math or science education. Note each contribution of \$300 or more should be counted as a separate activity.

Host Student Competition or get Students to attend section meetings

Engineering related presentations to K-12 schools, universities, or student sections

Participation in engineering job shadowing / mentoring program, or Engineering Fairs / Symposium

Support Local Government body with engineering related topics

**Performance Grading Scale:** Section grade based on numbers in left column.

- 1 = Do no activities listed.
- 2 = Do 1 of the activities listed.
- 3 = Do 2 of the activities listed.
- 4 = Do 3 or 4 activities listed to aid in the development of the engineering profession
- 5 = Do 5 or more activities listed to aid in the development of the engineering profession

## **Item 5 Section Operations**

Executive committee planning meetings held

Conduct 15 min. member benefits program at section meeting

Update Chapter History

**Performance Grading Scale:** Section grade based on numbers in left column.

- 1 = No Executive committee planning meetings held
- 2 = 1 Executive committee planning meetings held
- 3 = 2 or 3 Executive committee planning meetings held
- 4 = 5 or more Executive committee planning meetings held
- 5 = 5 or more Executive committee planning meetings held, member benefits program held at section meeting and chapter history updated

## Forwarding Instructions

Please email your form to [unitsupport@asme.org](mailto:unitsupport@asme.org)

**Or**

Mail a hard copy to:

ASME International  
Jessica Albert  
Unit Support  
MS/23S1  
Three Park Avenue  
New York, NY 10016-5590

**Or**

Fax to your form to, Jessica Albert, Unit Support at:  
212-591- 7671

**The 2009 ASME South Texas Leadership Summit was truly a success.**

We had more the sixty delegates and had local sections travel from as far away as Corpus Christi (a 4 to 5 hour drive) for the event. In the discussion afterwards with many participants, the Summit far exceeded their expectations. These outstanding results were due to a great team effort.

Here are some questions to consider:

- 1) What were the key themes that you heard?
- 2) What are the most critical opportunities that we should address this year?
- 3) What should our plan be to maintain the momentum?  
(Both the collaboration and high energy coming out of the Summit.)
- 4) What can we do to achieve even greater levels of excellence with the next Summit?
- 5) What are your personal action items from the Summit and implementation timeline?

I look forward to your thoughts, reflections, and responses. By providing everyone your feedback, this will help us explain what happened at the Summit, how we can maintain the momentum, and where to focus now.

A copy of all presentation material is available via electronic pdf file as well as the summit group picture, and will be distributed as requested.

Once again, **thank you** for all of your talent and efforts that made **the Leadership Summit a remarkable success.**

Please take a moment to gather your thoughts and respond. Your participation is greatly appreciated.

Vojislav (Vic) Ilic  
ilicv@asme.org

## INTRODUCTION

The aim of this note is to bring into focus some factors that are appropriate when considering either delivery of a program internationally, or creating one by an international unit. In either case, the activity should reflect – or not diverge from, the Mission and Vision of the ASME.

When delivering a program at an international location, it is imperative that attention be paid to the aspects of the local culture and customs that would not cause unease with the host – and the indigenous audience.

It is also imperative to contact the local ASME unit as well as the ASME office/agency if there is one in the area. This is necessary so as to avoid alienation of the field units from ASME HQ and help promote the Team spirit. Sometimes it may be more appropriate to engage a local speaker to address the audience in their native tongue – to ensure wider dissemination of the message and avoid misunderstandings.

In addition, there are often National Societies of Engineers in countries outside North America, and activities of ASME ought not to be seen as competing for membership – or present a rivalry of any description. Ultimately, all societies support the technical profession – and as such are not in competition with each other for their membership. It would be ideal to have joint (i.e. ASME, IMechE, etc) technical activities with those of the National Society.

If an international unit is conducting a program, it should ensure that it is focused on the technical aspects that are of greatest benefit to the local audience. It may be necessary as well as highly desirable to engage eminent speakers from the District. The District Leader should be notified of such an activity so as to provide the necessary support.

## IDEAS

A Section has the critical mass of members that can financially sustain itself through the Merit Based Funding program. This allows it a measure of freedom to provide for members the most appropriate offerings: seminars, site visits, conferences and colloquia. When deciding on the content of these, it can be done from the point of view of bringing awareness of a new technology or providing members with a content of interest to the majority of members. Lectures can be televised live or recorded for future reference or even offered for sale as DVDs to help augment the Section Budget. A nominal entrance fee could also be imposed for the same reason.

The Section Program ought to be planned well in advance and a schedule publicized (even in a draft form) to ensure wide dissemination and subsequent maximum participation of members.

Other than issues of local interest (depending on the specific industries in the area), one of the topical issues that needs greater, as well as perpetual attention, relates to the

sustainability of life on the planet, energy generation and utilization, reduction of the effects of climate change and provision of food and water. These are global issues, and ASME in its global role is ideally placed to provide leadership in that regard.

Specific topics therefore suggest themselves, such as:

- Waste management needs to be addressed as the rate of its generation already exceeds the ability of the planet to deal with it unaided.
- The question of having an adequate transport system is becoming increasingly important – and probable sustainable future scenarios need to be investigated.
- Increased efficiency of all energy consuming and producing devices.
- A multidisciplinary approach to shelter design, as populations in great numbers become displaced in low lying areas proximate to seas.
- Engineering aids in medicine.

## CHALLENGES

ASME as a global association of Mechanical Engineers with a large membership, is ideally placed to muster a global response to global challenges, such as those listed above. It is only through the concerted efforts of many that solutions to global challenges may be achieved. ASME Sections, as field units of the organisation, need to become acutely aware of global problems and first tackle them on District Basis. Global action strategies should emerge as Districts link up to address them. The major challenges to achieving enhanced effectiveness include:

- Competent Leadership
- Effective communication
- Engendered team spirit
- Adequate material provisions
- Membership growth

## CONCLUSION

ASME is a global organisation and therefore ideally suited to contribute significantly to tackling problems facing the planet. These include environmental sustainability, climate change, looming critical shortages of food and shelter, energy production and its efficient utilization. These challenges can be successfully tackled through, among other things, well trained leadership, effective communication, adequate material provision and continuing membership growth.

Awareness of the local culture norms, linking up with local ASME leadership (as well as appropriate ASME Field Offices) when engaging in international activities, is imperative for the lasting positive effect of the mission.

International Sections should promote joint activities with the local Societies.