



ASME International

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**ASME**  
**Council on Member Affairs**  
**Section Programs Handbook**

**Manual ML-15**

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The mission of the American Society of Mechanical Engineers is to promote and enhance the technical competency and professional well-being of our members, and through quality *programs* and *activities* in mechanical engineering, better enable its practitioners to contribute to the well-being of humankind.

## **Preface**

ASME as a society annually conducts an extraordinary number of meetings, programs and conferences. The topics of these events reflect the tremendous breadth and depth of our society. Participation in ASME programs is perceived as one of the most important Member benefits. However, Members not active in technical divisions, regional, or society level programs often base their view of ASME on the meeting events occurring at their local unit.

Resultantly, Section programs have enormous visibility and impact to the membership at large. Solid Section programming is the cornerstone of a healthy Section. Indeed, Sections that hold high quality programs enjoy high participation levels, and in turn have significant numbers of volunteer leaders. Sections holding few meetings of inconsistent quality are the units at greatest risk of sliding towards inactivity. Rejuvenating a Section is difficult when experience of sound Section program planning is lost.

This resource was developed in response to this dilemma. We have attempted to collect a concise resource to aid the Program Chair and Section Chair in planning and delivering exciting activities. This Manual contains planning tools, documents preferred methods of designing and executing informative programs, and captures great meeting examples from throughout our society as an “idea bank”. Sections are encouraged to supplement and recommend updates to this guide as we continue to capture program “best practices”.

An important part of this resource isn't in this Manual – we have developed a comprehensive planner for Sections to use. This planner will be prepopulated with ASME activities and dates, and kept “evergreen” for each year. Please download this valuable planner from the ASME website.

*Mike Molnar, Vice President – Region VI (1999-2002)  
CMA Regional Operations Task Force*

**Acknowledgements** This Section Programs Manual is the product of volunteer efforts, with notable contributions from Section Members active in the 2000-2001 program year: Richard Bosewell (South Texas Section), Michael Gron (Central Indiana Section), Jeff Regner (Baltimore Section), and Jeff Gessaman (Centennial Section); with special assistance from our talented ASME staff, particularly Pamela Hunt. Finally, we've based this resource on the best of prior work in Programs planning and support, most notably an early Programs Guide developed by J. B. (Bucky) Kitto, Vice President of Region V (1992-1995).

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## ASME INTERNATIONAL SECTION PROGRAM MANUAL

### Introduction

This Manual is a guide for planning and executing successful Section programs. Sound programs are paramount to the livelihood of the Section, and the cornerstone of the unit's annual activities. For simplicity, this Manual will use the terms Programs and Sections in general. Programs will refer to any type of Section general meeting, and Sections will refer to any local ASME unit (Sections, Subsections, Groups, and Technical Chapters). Strong and active Sections offer a diverse set of interesting programs, and have the least difficulty in attracting participating Members and volunteer leaders. Indeed, Section programs are the most visible service of a local Section to its Members. They also provide an important vehicle for ASME to meet its goals of improving and broadening the technical abilities of its Members.

Strong programs increase the participation of Section Members. Leadership positions are more easily filled when more Members attend Section Meetings, and when those meetings demonstrate the value of taking leadership positions. As Member participation increases, effective programs are easier to execute.

With active participation in local Section activities, the volunteer Member is provided a unique opportunity to practice hands-on leadership outside of the daily routine. Although the experience is separate from that in which members earn a living, section leadership often does provide the opportunity to demonstrate to your peers, clients, and associates that competence in the public arena suggests competence in the professional arena. For this to be a rewarding experience, the volunteer should complete assignments with recognition of a job well done.

Sections with strong program committees develop a wealth of history and experience upon which to draw. However, those Sections struggling to fill leadership positions all too often have lost that "institutional knowledge" of how excellent meetings are planned and executed. Developing a resource to assist these groups is the principal reason behind this Manual.

This Manual was developed to provide guidance for the large active Sections as well as smaller Sections. Smaller Sections may not be able to fill all positions and/or provide all activities. While reviewing this Manual the Section leaders should evaluate what is achievable. Growth of the Section leadership should always be a goal; however, smaller Sections should not become intimidated by standards set for the larger Sections.

This Manual cannot be a “how to” guide for developing programs as every Section has a different membership composition with unique interests and needs. Instead, this Manual is a resource guide to support program planning. It contains recommendations on planning meetings along with proven meeting ideas and topics. Leaders are advised and encouraged to understand their membership and to tailor program types and topics accordingly.

Finally, this Manual does not stand alone. ASME provides other resources to assist Sections in program planning. An important resource is ASME Manual ML-10 (Section, Subsection and Local Group Operations). The ASME web site also provides current resources and calendar information as well as links to other local Sections that may serve as examples. Section leaders should also contact their Regional Vice President and Regional Director for other resources.

## Program Committee

Sections are strongly encouraged to form a Program Committee. While the Section Chair or Executive Committee may choose to handle all of the meetings, the Section leaders will find managing the workload unsustainable. A few individuals experienced in conducting meetings eventually will tire of “doing everything themselves”. Appointing a team of volunteers improves the quality of programs as additional people provide a greater diversity of ideas, better distribution of workload, and reduction in omissions and errors when planning meetings.

Appointment to the Programs Committee is frequently the best way for new volunteers to gain Section operational experience. As such, Section Chairs are advised to make the continuous development of a sufficiently staffed programs team a leading priority.

Planning and conducting excellent programs does require talent and expertise. These are gained primarily through effort and simple experience. Accordingly, the overall leadership of a Section’s Program Committee should be conducted by a seasoned leader. This individual should delegate and mentor wherever possible, rather than personally handle meeting affairs. Not only will the involvement of more people make the job easier, more importantly participation is the best way for new volunteers to gain valuable leadership experience.

Sections that concentrate on their program committees find there is a greater pool of talent to recruit future Section leadership. If, for example, a Section decides to plan eight major meetings per year, the Program Committee ideally should have at least nine people. Each volunteer serves as a “Meeting Director” for one event leaving the Program Chair free to assist as a mentor. In this way, work is shared, volunteers gain experience, risk is minimized, and program quality is increased.

The Executive Committee should set the overall Section program plan based on the needs of the local membership. Special interests in the Section should have representation on, or have close contact with, the Program Committee. Sections may have additional leaders or committees that interact closely with the Program Committee.

Concluding the program, the Program Chair is responsible for recognizing the “Meeting Director”. Certificates are available through the Field Offices. Such recognition is always important in maintaining the interest and morale of local volunteers.

## Planning the Section Program

The end result of a basic program plan is a pattern of Section gatherings with the following objectives:

1. Stay within the Section budget,
2. Effectively use the Section leaders' cumulative and managerial ability,
3. Serve the many interests of the Section by providing stimulating and helpful engineering information,
4. Afford an optimum opportunity for informal interchange of experiences, knowledge, and social contact among Members, and
5. Accommodate the logistical and geographical issues of attracting Members from remote areas of the Region.

With this in mind, not all programs need to be “barn busters”. Holding a couple of large meetings each year is important to involve as many Members as possible, but the niche programs can be equally effective in drawing Members from remote corners of the Section. Sections need to review their demographics when planning meetings and use their ASME membership database accordingly.

Overall planning must be included in the Section budget, and a comprehensive program list completed by the incoming Program Chair (under the mentorship of the outgoing Program Chair) as early as possible, preferably before July 1<sup>st</sup>. Since the Executive Board begins a new term in autumn, the leadership is free to announce the meetings early and spend the remaining term planning specific meeting details.

If deemed necessary by the Section, press notices of the meetings (before and after) should be delegated to a Public Relations Chair.

## **Related Committees**

A number of Section Committees support the Program Committee and aid in successful Section events.

### **Committees on Special Events**

When planning a program that includes special events (luncheon, dinner, plant visit) it is always best to assign responsibilities to individual committees to ensure adequate planning and execution.

### **Newsletter Editor / Newsletter Distribution Committee**

Successful meetings depend on a persuasive and comprehensive Newsletter. The Newsletter is probably the only notification that most Members receive about Section Meetings. Accordingly, it must provide them with all of the information they need in a format that persuades them to take the time to attend.

The Newsletter should be presented in at least three forms. First, the Newsletter should be delivered regularly on paper through the mail. Second, it should also be available by e-mail. Finally, the Section should maintain a web site that contains the same content as the Newsletter, but takes advantage of the ability to remain current and interactive.

The Newsletter should contain information on the next Section Meeting as well as a summary of all of the upcoming meetings. Upcoming events may be highlighted in a calendar of events on the back page or other prominent space in the Newsletter.

A banner on the front page of the Newsletter should clearly spell out the location, subject matter and date of the next Section Meeting. The front page should also include a paragraph providing background information about the subject matter of the meeting that is presented in a way that entices Members to attend. Announcements should be sent two months in advance if going bulk mail, or one month if going first class. Sections can obtain inexpensive bulk rates if the Newsletter has no advertisements. Details can be found at your local post office, or visit the USPS web site.

The meeting description must also include certain vital pieces of information. This information should include, but is not limited to: date, time, location, cost, RSVP contact and direction. Arrangements for parking, security, dress code and accessibility information may also be included. The manner in which the paper Newsletter is produced and distributed depends primarily on the size of the Section. The options for producing the Newsletter range from photocopying to commercial printing. Most local printing companies will provide a cost

estimate and give guidance as to the most efficient and economical way to produce the paper Newsletter.

Newsletter templates and tools are available for producing the Newsletter in ASME Manual MS-73, as well as from the ASME website <http://asme.org/pi/sectionresources.html>. The website has electronic templates along with pre-populated news (society and industry) suitable for use in local newsletters. The Newsletter Editor should not feel bound to follow the precise format of the template but may customize the format to meet the needs of the Section.

Advice on mailing the Newsletter may also come from the printer chosen by the Section. ASME offers assistance to make the mailing easier. For example, pre-addressed envelopes (#10 size) or pressure sensitive labels are available from ASME. They are sent, upon request, to the Section Secretary, each month except June and July. Arrangements may be made through the printer, in coordination with the Post Office, to label and mail the Newsletter by first class or bulk mail. Because the envelopes or labels are run each month to ensure that the latest address data is used, they should not be stored for long periods.

Perhaps a more efficient means of forwarding the Newsletter is electronically. Some Sections use the ASME Membership Section Emailing function to distribute their newsletter. When using this function Section are able to ensure their membership listing in current and each member of the Section which has an email address on file with ASME will receive a copy of the newsletter.

Changes in postal rates make it advisable to consider the mailing class very carefully. Larger Sections will find it economical to use third class mail (circulars and other printed matter) at bulk rates. These rates apply to mailings of separately addressed identical pieces (either envelopes or self-mailers requiring no envelopes) of not less than 20 pounds or of not less than 200 pieces. Since the Society is classified as a non-profit organization, this type of mail is available at special rates. Requests for rates and procedures to be followed to obtain the necessary permit should be directed to the local Postmaster. This method requires greater lead-time as third class mail is usually slower, particularly around the holidays. Again, research the Internet for the latest details on the USPS.

Sending meeting notices to other Sections in the Region as part of a "regional network" is good practice and promotes the exchange of program ideas. Sections are requested to send a copy of their Newsletter to each unit within the Region, as well as to the Field Office and the Regional Vice President. The mailing labels supplied from Headquarters should already include these additional addresses. Sections that use their ASME membership database for generating

the mailing list, however, will need to include these regional addresses. Contact your Field Office for these addresses.

### **Web Pages**

Internet communications have become a standard in today's technology. A Section web page can provide many services such as

- Meeting announcements
- Officer contacts
- Special event coordination
- Depository of Section activity and history
- Provide summary of previous programs
- Member features and company highlights
- Connection to ASME International
- Advertiser revenue to fund special projects

However, not all Members use the Internet so this is not a complete solution to the high costs of Newsletters. The Webmaster does not always have the time or the perspective to seek out and report the latest and important news. This requires close coordination with the Newsletter Editor and Committee.

### **Announcement Committee**

In order to get the majority of Members out to Section meetings, it is necessary to publicize the meetings in every possible way. This may include word-of-mouth as well as written notices. An Announcement Committee can complement the efforts of the Public Relations Committee by posting bulletins in plants and schools and generally publicizing each meeting.

### **Badge Committee**

A separate group should see that each person attending a Section meeting has a name badge. In some Sections this is an added responsibility of the Treasurer who has the responsibility of collecting money and issuing receipts. Pocket tags for ASME Members and guests are available on request from Headquarters. This is an effective way to discover new Members and guests and steer them into the hands of the Fellowship Committee. Another function of the Badge Committee is to advise the Chair of new Members so that they may be introduced. Returned badges afford a check of Member and non-member attendance for the information of the Program Committee.

### **Welcoming Committee**

Each Section should designate a small group to welcome each person attending a meeting and see that he or she meets others. At least one Member of this group should be on watch for new faces at each meeting and especially to greet non-members.

This is an important function often served by the entire Executive Committee. Be sure to make visitors, guests, and students welcome and they will likely return. This is also a great way to find candidates willing to serve on your Executive Committee.

## **Specialized Interests**

An important phase of program planning is determining what Member interests should be served. One obvious breakdown of interests is that of dealing with specialties within the field of mechanical engineering. Many Sections recognize these interests through the formation of technical divisions or Technical Chapters whose representatives may be part of the Program Committee. It is important that the technical divisions within a Section be surveyed frequently to make sure that the area interests of the Members are reflected in the Program Committee personnel and planning. Several Sections have had notable success in organizing discussion groups or seminars that have the great virtue of bringing together specialists in small groups where each Member has an opportunity to participate in

or lead the discussion. The following pages are a useful guide for organizing and conducting discussion groups.

A second interest group that must be considered in the overall program plan are those newly graduated Members. Each should be made welcome at Section events but special discussions on subjects of particular concern to these younger Members should be planned. All committees should be alert to the advantages of having young Members actively participating in their Section.

A third important interest group is that of the Members of those Student Sections within the geographic boundaries of the Section. They should be informed of Section events and encouraged to attend. Some Sections program an annual student affair where students welcome the opportunity to converse with experienced engineers. A meeting devoted primarily to student interests should be planned to give the best possible opportunity for close contact among students and older Members.

In addition to giving attention to special interests, it is important for the Section to recognize that concern for the profession as a whole is the main purpose of an ASME Section. The annual pattern of meetings should reflect this concern, creating opportunities for mechanical engineers from a variety of specialties to exchange the latest technical information. There should also be occasions where mechanical engineers can meet with other engineering specialists on matters of broad engineering and community significance.

## **Discussion Groups**

### *A Means of Meeting Special Interests of Members*

Only a bare organizational structure is necessary or desirable. A Chair or group leader who is both well versed in the major aspects of the subject and highly enthusiastic is very desirable. If needed, the Chair may select a small assisting committee.

No planned formal program is used. Discussion subjects are selected with the aid of suggestions from Section meetings. One or more specialists from local industry are brought in for each meeting by the Chair to touch informally upon the highlights of the subject or phase being covered, bringing the group up to date on latest developments or unusual new applications. Meetings are then opened to informal round table discussion and the specialist answers questions. The entire discussion is guided, stimulated and kept on track by the Chair. It is important that specialists be carefully screened to ensure that they have no axe to grind regarding the subjects to be discussed. Discussion should be kept constructive at all times.

Subjects and specialists are arranged several months in advance and programs are arranged to fall on the same day each month if possible. Wherever possible, the discussion group meetings are scheduled to take place at local plants engaged in similar type work or phases of work where the subject to be discussed can be dramatized. The aim should be to have small groups of 10 to 20 people. Larger groups tend to reduce participation. Where larger groups are encountered, more than one specialist might be used and small groups set up to cover various phases of one major subject.

## General Program Planning Strategy

Sections are encouraged to form a Program Committee to plan and execute meetings. Support of this committee by the Executive Committee is critical. It is recommended that the Section's Executive Committee take an active role in establishing an annual plan, with a few stated priorities and objectives. This plan sets the overall meeting strategy for the coming year and provides a framework for the Program Committee.

In creating the Program Strategy, a few key principles are offered:

1) Know your membership

Have a basic understanding of the Section's demographics. The methods used most often for this are using the ASME membership database and periodically doing a survey of local Members.

1a) For the database, create a spreadsheet (or printout) of the local membership by area, and a second view by company or organization. Which areas have the greatest concentration of Members, and what are the top ten organizations by ASME membership in your Section?

1b) For a survey, consider doing a periodic poll of your Members. This is frequently done annually in a Section's Newsletter along with ballots for Executive Committee positions. Avoid lengthy surveys and keep it concise – multiple page polls may provide more detailed information but the response rate also falls. Use the poll to solicit ideas for technical meeting topics, tour sites, and preferences on days and times.

2) Learn from History

Create a Programs History file. This can simply be a copy of past meeting announcements kept in a binder. The key is to annually summarize what meetings were held, along with some basic metrics. The record should show how many participants were there, what went well, and what might have been done differently for an improved program. Past programs are an important part of a Section's heritage, but avoid falling into the trap of repeating the same program plan or general set of meeting topics. If you are having a meeting simply because it's "the second Tuesday of the month" then it is definitely time to reconsider the strategy.

3) Keep an “Idea Log”

The Programs History is one archive of ideas, and a highly successful meeting topic or tour might be appropriate to replay a few years later. Similarly, the Newsletters of other Sections in your Region are an important source of ideas. The Idea Log is a tool to keep meeting ideas “evergreen”. After reviewing membership data and Member survey information, the Executive and/or the Program Committee should have an annual brainstorming session. What types and topics of meetings are of interest? Most likely there will be more ideas than meetings, so these surplus ideas are captured on the Idea Log for future years’ consideration. Keep any idea created – what might not work this year may well be very appropriate in the future.

4) Create Balance

There are two forms of a balanced program – balanced in meeting archetype and balanced in meeting location.

4a) For Meeting Archetype, the most common programs are:

The Technical Meeting – This is most often a dinner meeting with a featured speaker on a topic of interest to the local membership. It is recommended that topics and speakers be carefully selected. A large variety of resources are available to assist the Section – the ASME Distinguished Lecturers Program is one example.

The Tour Meeting – This would include a visit to a company’s plant, organization’s facility, government institution, university, national laboratory, etc., that may or may not involve a meal. Check the ASME database as a means to find ASME local Members at selected tour sites who can be approached to serve as the host contact or Meeting Director.

The Social Meeting – A meeting of a “non-technical” nature, which is considered suitable for a broad audience. Common types are “fun” venues as in a children’s museum or zoo that may be family-friendly. Another common type is an annual honors and awards dinner where volunteers are recognized and students are presented with awards or scholarships.

Clearly there is a broad range of possible Section meeting topics within these three archetypes, as well as other meeting types of interest to local membership. The key point is to hold a variety of meeting types during

the year to best serve the membership's diverse interests.

- 4b) For Meeting Location, the membership profile created from an analysis of the ASME database is extremely important. Especially for Sections covering a large geographic area it is essential to periodically choose appropriate venues. Perhaps the majority of meetings are held in a central, metropolitan area but more remote locations with significant pockets of Members should occasionally be the meeting site. An annual meeting summary discussed earlier is a good tool to see where a site might be "due".
- 5) Determine when to have your meeting: noon luncheon or a dinner meeting in the evening. Often this would draw two completely different groups of Members.
- 6) Determine where to have your meeting. In large areas finding the "one" best location is not possible. The program committee may need to experiment and try new sites out. For instance, the South Texas Section in Houston covers a large area and has been successful to the point that up to a dozen different meetings and Professional Development programs are often conducted each month. These have focused technical interests and cover different parts of the large area. In fact, the Section has become so well spread out that the original Section meeting in the center of the area is now struggling to attract attendees.
- 7) Seek notable speakers that are high ranking within their company. They become big attractions and encourage support of the Section Members. Managers of large projects attract the people who have worked on the project, the vendors who participated, and the competitors who want to know more.

## Types of Program Events

In planning the Section program, there are many types of events that may be used. Of those most commonly used by ASME Sections, the following are typical.

### General Meetings

These are programs of broad interest to ASME Members and include a noteworthy speaker and a question period.

### Joint Meetings

These programs are sponsored jointly with other engineering groups, or arranged by the Section with other groups invited, and are of broad engineering, scientific, industrial or community interest. Refer to ASME Manual ML-10 for information on co-sponsorship and cooperation with other organizations.

### Technical Meetings

These programs embody specialized interests with carefully organized discussions. This type of meeting can be presented alone, as part of a formal dinner meeting, or after one of the more informal sessions described below. In general, technical overviews of projects are more likely to be attended than detailed technical presentations. Members attend technical conferences for detailed information. Yet the technical presentation based on a conference paper is a good source of program material because the speaker is already prepared for an encore appearance.

## Types of sessions

**Session of General Interest:** Topics of a semi-technical or non-technical nature (such as those dealing with ethics, economics, education, etc.) of interest to a broad group may be arranged.

**Symposium:** A number of papers covering various parts of a subject may be grouped together for presentation in a series at a single session.

**Forum:** A group of related informal papers discussing various aspects of a single subject may be presented at a single session. Panels for a symposium or forum should include not more than six individuals as experience has shown this number to be a reasonable maximum.

**Discussion Groups:** Refer to the Special Interests section for a complete description.

**Film Exhibition:** This can precede or succeed principle events. In certain instances a special film may be suitable as the entire program. Films can be obtained from various sources including state historical societies, the Smithsonian Institution, and from ASME Headquarters and Field Offices.

**Luncheon:** A program with a speaker or discussion group is useful for concentrations of Members.

**Coffee Talk:** A short presentation of an important matter of current interest, usually following dinner and preceding the principal event.

**Dinner with Address:** A more formal affair useful when attendance for a distinguished guest is to be assured by advanced sale of tickets.

**Plant Visits, Outdoor Events, etc.:** These are extremely useful functions in promoting fellowship as well as technical benefits. Such an event may be preceded by a luncheon with or without a speaker. It also might be following or followed by a dinner or technical meeting. Refer to ASME Manual ML-10 for Society policy on chartering airplanes, ships, buses, or group tours.

**Joint Event:** Sections are encouraged to seek opportunities to hold events of any type with nearby ASME Sections, or related organizations.

## Meeting Accessories

Section Program Committees will find the following list of meeting accessories, all available from Field Offices or Headquarters, helpful in carrying out their program work:

1. Identification tags – Member/guest
2. ASME Public Relations Chair's Guide
3. ASME Lectern Banner (15" square)
4. ASME podium banner
5. ASME emblem on tie back, tie bar, cuff links, briefcase, and pen and/or pencil set. These make appropriate gifts for speakers, program participants, etc.

## Overall Section Program Plan

The overall plan for the annual Section program activities should be prepared in the preceding year to provide ample time to identify individual speakers, arrange trips and plan tours. All final topics, events and speakers need not be finalized by the beginning of the Section year on July 1, but the overall plan should be in place and individual programs should be finalized at least three months in advance of the meeting date. The program plan should be a mixture of dinners, tours, general interest topics, technical topics and other activities that best suit the needs of the individual Section. Frequency is up to the individual Section with monthly activities the most common. Some Sections hold more than one activity a month while others alternate months.

There are as many program plans as there are Sections, Subsections and Groups within the Society, and there is no official or even recommended plan. However, the following provides a sample program plan used by some Sections. (See next page.)

The supplemental module to this manual presents “best practice” programs as examples of meeting topics, sites, and dinner costs.

Month	Type of Program	Sample	Final Date/ Location	Responsible Member
September	Kick-off meeting General Interest topic	Personal computer update & demo (possibly manager's night)		
October	Tour	Steel tube manufacturing		
November	Technical topic	Automated manufacturing		
December	Social event	Dinner and local play		
January	Technical topic (joint with another society)	Material in space		
February	Engineers banquet (joint with other societies)	General interest topic - engineering in amusement parks		
	Lunch meeting/ discussion	Local engineering issues		
March	Technical	3 short technical presentations by local members		
April	Tour	Local research center		
May	General technical/ honors & awards	Stealth military technology		
June	Social	Picnic/golf outing		
	Social	Thank you barbeque for Section officers/ Committee members		

**Note:** The final date and responsible Section Member should be set as early as possible and are subject to change.

## Sources of Program Ideas

With the completion of the overall program plan, concentrating on the details becomes the next step. For general and technical meetings, an alert Program Committee:

1. Seeks special leaders in the Section who have a good reputation for original thought and who are good speakers and writers.
2. Consults the programs of other Sections.
3. Consults the programs of national meetings and conferences for speakers within the area.
4. Reviews *Mechanical Engineering* and the business press.
5. Contacts colleges and universities in the Section.
6. Seeks large-scale commercial projects. These are always of interest to the community because many subcontractors are involved. Projects may be recently announced, in progress, or concluding ventures. Seek notable leaders of the projects and invite them to speak. They may delegate this to others, but always seek the highest-ranking Manager available.
7. Asks high-ranking peers within its Members' own companies for ideas and their help in recruiting notable speakers.
8. Understands that technical programs are often very well attended, but avoids too much technical detail that no one but the speaker understands.
9. Seeks updates from its State Board concerning Professional License issues.

## **Fundamentals of a Successful Meeting**

### **Far in Advance of the Meeting**

1. Select a Program Chair that has the vision to seek out effective programs and either has many personal connections or has support of corporate peers who can assist in contacting speaker candidates. Soliciting speakers is similar to making cold calls in sales. Not everyone can do this. The Program Chair must be willing and committed to the mission, and mentoring his or her meeting director
2. Select a competent Meeting director, someone who is a good presiding officer, knows the subject to be discussed and the leaders in the field. Have additional members of the Program Committee identified to assist with the mechanical logistics of the meeting – lights, slides, films, etc.
3. Select a good speaker.
4. Choose a good time, and select a site early. Many venues require a down payment and an early head count. Account for all the costs and the due dates. Make sure that the operating board is aware of the arrangements, and that the cost is within budget.
5. Organize the discussion. Publicize discussion leaders' names in advance. A good discussion frequently saves what otherwise might be an indifferent meeting.
6. Secure a list of materials or equipment desired from participants, such as projectors, flipcharts, etc., and make sure these items are available for the meeting.
7. Give participants specific information in writing as to the meeting date, time, place, topic, dress required and details about events prior to the meeting. Distribute an advance program.
8. Alert the Public Relations Committee and Announcement Committee to ensure necessary notices and pre-meeting publicity are distributed. Attractive notices that reach beyond Section Members stimulate attendance of Members as well as guests and add to the prestige of the Section as a leader in the Community.
9. Alert the Welcoming Committee and Badge Committee.
10. Alert the Treasurer or designee if money is to be collected and/or bills are to be paid at the meeting.

11. Lastly, have an alternative program ready to implement if the speaker cancels at the last minute. Be sure to keep in touch with your Primary and Alternate Speaker as the meeting date approaches so that adjustments can be made in a comfortable manner. Often the alternate program will be in standby mode throughout the year. ASME officers are often ready to step in at the last minute.

### **Just Before the Start of the Meeting**

1. Check the stage setting to ensure that equipment is in place. See that the ASME banner is properly displayed.
2. Make sure that the Badge Committee, Welcoming Committee, Membership Development Committee, Treasurer, and any other necessary support are on hand to create a gracious air of welcome. Display membership applications and Society literature.

### **At the Meeting**

1. The entire operating board should ensure each attendee feels welcome.
2. Attend to the needs of the speaker.
3. Ensure that the meeting starts and concludes on time.
4. Have the Section Chair introduce the Meeting Director.
5. Have the Meeting Director introduce new members and guests.
6. The Meeting Director should gauge audience interest and keep events moving.
7. The Meeting Director and Section Chair should thank all participants when the meeting is adjourned.

## **Speaker Difficulties**

Usually the Section meeting is conducted in a professional manner, but on occasion the speaker may offer too much personal comment either intentionally or not. This may offend your attendees and they may not return even if they have provided immediate feedback to the Section officers.

Several sections have experienced serious difficulties, and have developed formal speaker guidelines as a means of avoiding or at least mitigating issues.

## **Example Speaker's Guidelines**

Section guidelines should be developed and approved as a unit bylaw, and reviewed with speakers in advance. The Meeting Director then is understood to be the host who is following policy, should violations occur. The Meeting Director might interject diplomatically if a minor transgression is unintentionally experienced, but should stop a presentation if the policy is intentionally violated.

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*The following guidelines are provided to our speakers to assure our attendees and membership of the highest caliber presentation; in the event you have doubts about the propriety of any matter to be discussed in a meeting, our Section Chair and Program Chair are available for consultation. Our Section wants to avoid even the appearance of impropriety or a breach of Society Policy concerning Ethics and Diversity and this is the spirit of these guidelines. Your cooperation is appreciated.*

- *Do not discuss the prices of goods or services of any particular company.*
- *Do not disparage the goods or services of any particular company.*
- *Do not offer personal statements of morality or discrimination unless this is an integral portion of your invited presentation. Do respect the diversity (sexual, religious, ethnicity) and professionalism of the attendees and Members.*
- *Do provide opportunity for the audience to ask questions either during or at end of your presentation.*
- *Do provide an agreed upon program concerning applications of technology or general interest content.*

- *Do acknowledge the sponsors of your presentation while avoiding unnecessary commercialism.*
- *Do provide handouts and Internet web addresses concerning your presentation.*

*Our Section's purpose is to educate and inform the membership of current technical and professionally relevant topics. Thank you for adhering to these guidelines. We appreciate your willingness to be an important part of this organization and the services provided to our industry.*

### **After the Meeting**

1. The Secretary or Program Committee should write thank you letters to all who contributed, especially invited speakers and guests.
2. The Badge Committee and Welcoming Committee should make a report at the next section operating board meeting
3. Forward manuscripts of important papers to Society Headquarters.
4. Send Copies of local publicity to out-of-town speakers.
5. The Treasurer should pay remaining bills

### **ASME Officer and Staff Appearances**

Invitations to ASME officers and/or staff to join a Section meeting may be appropriate, particularly as an invited speaker. Consider leaders of local Technical Divisions as good resources. The Regional Vice President, Field Office, and Members of the Regional Operating Board all have a special interest in supporting local Sections. Regional leaders are often receptive to meeting invitations. They frequently have prepared topics and training programs of interest to ASME Members. Contact your Field Office or Vice President.

Other Society level officers and staff may be appropriate speakers. However, sufficient lead-time should be given in any request.

Increasing demands on the President of the Society to appear before Sections and Students Sections, in addition to his/her many administrative duties, has led the Board of Governors to adopt a guiding policy. Accordingly, appearances of the President are the subject of special correspondence.

In many instances, the local Section Membership includes former Officers of ASME such as Past Presidents. These individuals are a great resource for the Section and they are often willing to attend as special guests or speakers.

## **Society Annual Meetings**

Meetings of the Society, which are national in scope, include the Summer Annual Meeting and the International Congress. Additional Technical Division Conferences are also important meetings. Sections may elect to plan meetings that dovetail with Society meetings occurring in or near their location. Sections may also serve as a “Host Section” for these Society level events. With a few minor differences, the mechanics of conducting both types of meetings are the same. The Host Section may participate in local arrangements such as spouses' tours and inspection trips. The Host Division (or divisions, in case of the International Congress) is responsible for the technical program. Program ideas are always welcome from the Host Section. To implement functions within its area of responsibility, the Host Section can work closely with the ASME staff representative from the Meetings Department assigned to that particular conference.

Close cooperative effort is encouraged between the Section and Host Division(s) in planning and executing a national meeting. To assure this cooperation, the local Section Chair and Regional Vice President are notified by the Board of Communications that a meeting is to be held in their area.