

Section/Division Leadership Checklist

INTRODUCTION

This document is intended to serve as a tool to assist with the planning of Section/Division duties, activities and events throughout the year. Tasks have been grouped by function area to allow for greater flexibility when assigning responsibilities. Recurring tasks are listed in the beginning of the document and should be carried out on a continual basis. Manuals and other tools are available to help with specific Board responsibilities. Visit the [Leadership Services](#) area of the SPE website for these additional resources.

Function Areas

- ANTEC Preparation: Technical paper submission process and other information relative to SPE's Annual Technical Conference.
- Awards: tasks related to nomination and application process for Society awards and recognition programs.
- Communication: sharing news, events, and information with members.
- Financial: budgeting, reporting and record keeping responsibilities.
- Membership: tasks related to recruiting, retaining and servicing members.
- Operations: administrative tasks necessary to ensure SPE compliance.
- The SPE Foundation: Grants and Scholarships

Recurring Tasks

Communication

- Thank/acknowledge individual(s) or group(s) who merit special recognition.
Tip: Achievement, recognition and blank certificates are available from the [Leadership Services Department](#).
- Share Section/Division news, events, leadership e-news materials with your membership frequently.
Tip: Send a monthly email to your members via SPE's Email Blast service. Request this service by using the [Email Blast Form](#).
- Share Section/Division/SIG news and event information on your group's web page (see www.4spe.org/technical-groups). To update your webpage, forward content to the [Leadership Services Department](#).

Membership

- Welcome members who have joined your Section/Division
Tip: New member rosters are sent monthly to Membership Chairs. Include a list of new members in your newsletter; send a welcome letter and/or call to welcome personally.
- Send reminders to individuals coming up for renewal.
- Acknowledge individuals for their continued participation with SPE when they a milestone anniversary with the Society.
- Update Board of Directors on membership activities and/or review monthly membership reports (received from SPE Headquarters).

- Forward updates to your members' contact information to the [Leadership Services Department](#).
Tip: If your group maintains a separate membership database, be sure these records also reflect updates from Headquarters.

Operations

- Verify that the [Leadership Services Department](#) is included in your newsletter distribution list.
- Forward meeting minutes to the [Leadership Services Department](#).
- Forward Board of Director changes to the [Leadership Services Department](#).

July

ANTEC Preparation

- Authors can submit abstracts for [ANTEC](#) session presentations June 1 through September 1 (5:00 PM ET) using the [abstract submission website](#)
Please note that authors are not required to submit abstracts. Authors may begin at the "paper submission stage" on September 8..

Financial

- Designate individual(s) who will complete internal financial audit for previous fiscal year.
The Board of Directors will review this report in September.
- Designate individual(s) (internal or accounting service) who will complete [SPE Annual Financial Report](#) and/or [IRS 990 forms](#) that need to be reviewed by Board and submitted to SPE Headquarters by November 15.
These forms are posted to the [SPE Treasurer Resources](#) by the end of the July. Section/Division Treasurers will be notified of availability.
- Submit budget for the current fiscal year to Board of Directors for approval. Forward copy of approved budget to [Leadership Services Department](#) for filing.

Operations

- New Officers, Directors and Committee Chairs take office. Complete a [Volunteer Leadership Roster](#) for the new term of office and submit to the [Leadership Services Department](#).
- Familiarize yourself with the Leadership Services area of the SPE site, www.4spe.org/communities/ld.
- Schedule Board meetings, Section meetings (if applicable) and any other events for the year.
Forward calendar of events and activities to the [Leadership Services Department](#).

August

ANTEC Preparation

- Authors can submit abstracts for [ANTEC](#) session presentations June 1 through September 1 (5:00 PM ET) using the [abstract submission website](#).

Please note that authors are not required to submit abstracts. Authors may begin at the "paper submission stage," on September 8..

Awards

- Determine if your Section or Division will nominate candidate(s) for [Honored Service Member \(HSM\)](#) or [Fellow of the Society](#) and verify eligibility. Applications are due October 20.
- Consider nominating a person or product for any of the eight [International Awards](#). Applications are due November 18.

Financial

- Verify receipt of Section/Division [IRS 990 Forms](#) and/or [SPE Annual Financial Report form](#). *These forms were mailed last month from SPE Headquarters to the Treasurer, or if that position is vacant, the Section President/Division Chair.*
- Confirm signatory cards for bank/investment accounts include signatures of correct Officers (those who have access to your accounts). *As people change positions on your board, these cards need to be updated.*

Operations

- Ensure that Councilor or proxy reviews Council meeting materials sent from SPE Headquarters and attends Council meeting scheduled for October 17-18 in Southbury, Connecticut.

The SPE Foundation

- Contact [The SPE Foundation Grants Program](#) about funding opportunities available to Sections, Divisions and SIGs for special programs and activities.

September

ANTEC Preparation

- Authors who wish to submit an abstract for [ANTEC](#) session consideration must do so by September 1 at 5:00 PM ET. *Please note that authors are not required to submit abstracts. Authors may begin at the "paper submission stage," on September 8..*
- Authors can submit papers for [ANTEC](#) session presentations September 8 through November 14 (5:00 PM ET) using the [paper submission website](#). *Division/SIG ANTEC Technical Program Chairs can work with author(s) on revisions to these papers from November 14 through January 9 (5:00 PM ET)*
- Division/SIG ANTEC Technical Program Chairs must complete review process by December 12 (5:00 PM, ET)

Awards

- Begin research and documentation necessary to facilitate the completion of nomination forms

for [Honored Service Member \(HSM\)](#) or [Fellow of the Society](#).

Applications are due October 20.

- Determine if your Section or Division will participate in the [Pinnacle](#) recognition program.
Submissions are due December 13.
- Review information about [Outstanding Student Chapter Award](#) and the [Chase Student Chapter Education Awards](#) with Student Chapters.
Deadline to enter is February 6.
- Review information about the [Husky – Section Education Award](#) to determine if your Section wants to apply for the \$5,000 award.
Deadline to enter is February 6.

Financial

- Submit completed internal financial audit of previous fiscal year to Board of Directors for review.

Operations

- Ensure Section/Division representation at the SPE Council meeting, scheduled for October 17-18 Southbury, Connecticut. Communicate name of representative to SPE Headquarters per instructions received from [Governance Liaison](#).

October

ANTEC Preparation

- Authors can submit papers for [ANTEC](#) session presentations September 8 through November 14 (5:00 PM ET) using the [paper submission website](#).
Division/SIG ANTEC Technical Program Chairs can work with author(s) on revisions to these papers from November 14 through January 9 (5:00 PM ET)
- Division/SIG ANTEC Technical Program Chairs must complete review process by December 12 (5:00 PM, ET)

Awards

- Perform final review of completed [HSM](#) and [Fellow of the Society](#) application forms and submit materials to SPE Headquarters by October 20.
Only applications that have been completed in their entirety will be eligible for consideration.
- [Annual Award](#) nominations are due November 15
- If your Section or Division will participate in the or [Pinnacle](#) award program and/or [Newsletter Contest](#), verify progress is underway to complete applications.
Pinnacle applications are due December 31.
- Review information about the Outstanding Student Chapter Award and the Chase Student Chapter Education Award with Student Chapters.
Deadline to enter is February 6.
- Sections should begin to contact local schools to take part in the [International Essay Contest](#).
Each individual Section decides deadline for submission of essay. Winning essays must be forwarded to SPE Headquarters no later than March 3.

Financial

- Verify that progress is underway for the completion of [IRS Form 990](#) and/or [Annual Financial Report](#). Contact the [Leadership Services Department](#) with questions.
The US Internal Revenue Service (IRS) must receive Form 990 and any accompanying documentation no later than November 15 or penalty fees will be assessed. NOTE: THIS APPLIES ONLY TO US SECTIONS AND DIVISIONS.
Forward copies of completed materials to Leadership Services Department.

November

ANTEC Preparation

- Authors can submit papers for [ANTEC](#) session presentations September 8 through November 14 (5:00 PM ET) using the [paper submission website](#).
Division/SIG ANTEC Technical Program Chairs can work with author(s) on revisions to these papers from November 14 through January 9 (5:00 PM ET)
- Division/SIG ANTEC Technical Program Chairs must complete review process by December 12 (5:00 PM, ET)

Awards

- Be sure to get your [International Awards](#) nominations in by November 18.

Financial

- Ensure that [IRS Form 990](#) (if applicable) has been submitted to IRS and a copy of the IRS form (if applicable) and [Annual Financial Report](#) have been submitted to [Leadership Services Department](#) by November 15.
The US Internal Revenue Service (IRS) must receive Form 990 by deadline to avoid penalty fees.
NOTE: THE IRS REQUIREMENT APPLIES TO ONLY US-BASED SECTIONS AND DIVISIONS.

Operations

- Councilor/Proxy should review information presented at the October Council meeting with Board of Directors.

The SPE Foundation

- Promote student participation in [The SPE Foundation Scholarship Program](#).
Applications are due to SPE Headquarters by January 15.

December

ANTEC Preparation

- Division/SIG ANTEC Technical Program Chairs must complete review process by December 12 (5:00 PM, ET)
- Division/SIG ANTEC Technical Program Chairs must schedule their session between December 12 (5:00 PM ET) through December 15 (9:00 AM ET)
- Division/SIG ANTEC Technical Program Chairs meet for ANTEC Matrix Meeting (web conference) on December 15 (1:00 PM ET)
- Division/SIG ANTEC Technical Program Chairs must ensure authors have complied with requests for paper revisions by January 9 (5:00 PM ET)
- Division/SIG ANTEC Technical Program Chairs must complete their final paper review by January 30 (5:00 PM ET)

Awards

- Review information about the Outstanding Student Chapter Award and the Chase Student Chapter Education Award with Student Chapters.
Deadline to enter is February 6.

Operations

- Determine vacant board positions for next term and seek volunteers.

The SPE Foundation

- Promote student participation in The [SPE Foundation Scholarship Program](#).
Applications are due to SPE Headquarters by January 15.

January

ANTEC Preparation

- Division/SIG ANTEC Technical Program Chairs must ensure authors have complied with requests for paper revisions by January 9 (5:00 PM ET)
- Division/SIG ANTEC Technical Program Chairs must complete their final paper review by January 30 (5:00 PM ET)

Awards

- Finalize and submit applications for the following Student Chapter and Education awards:
[Chase/Husky](#) Deadline: February 6
[STRETCH](#) Deadline: February 6
Applications are available on the Awards & Recognition page of the SPE website.
- Encourage student applications for the [Sigma Pi Epsilon](#) Honor Society.
Applications must be received by February 15.

Operations

- Hold elections to determine new Officers and Board of Directors for next term of office.
Review the Section/Division Leadership Guidelines for election procedure details.

The SPE Foundation

- Grants are available from [The SPE Foundation Grants Program](#) to fund special projects in your Section, Division, or community. Applications are available on the SPE website.
- If you are thinking about bringing the National Plastics Center Plastivan to your area or your conference, now is the time to apply for funding from The SPE Plastivan Foundation Grants Program.
- Matching grants are available from The SPE Foundation to provide thermoforming or blow molding equipment to schools. If you are aware of schools in your area that could benefit from this program, refer them to The SPE website.

February

Awards

- Forward winning [Essay Contest](#) entries to your SPE Headquarters.
Entries must be received no later than March 3 for inclusion in [International Essay Contest](#).
- Work with students to complete [Sigma Pi Epsilon](#) application forms and submit materials to SPE Headquarters.
Applications must be received by February 15. Only applications that have been completed in their entirety will be eligible for consideration.
- Finalize and submit applications for the following awards:
[Chase/Husky](#) Deadline: February 6
[STRETCH](#) Deadline: February 6
Applications are available on the Awards & Recognition page of the SPE website.

The SPE Foundation

- Grants are available from [The SPE Foundation Grants Program](#) to fund special projects in your Section, Division, or community. Applications are available on the SPE website.

March

ANTEC Preparation

- Promote/encourage student participation at [ANTEC](#).
Share information about opportunities to serve as [Student Ushers](#). Student Chapters may request a complimentary [Student Chapter booth](#).

Operations

- Ensure Section/Division representation at the SPE Council meeting, on June, 2009 in Chicago Illinois. Communicate name of representative to SPE Headquarters per instructions received from [Governance Department](#).

April

Operations

- Ensure Section/Division representation at the SPE Council meeting. Communicate name of representative to [Governance Department](#) at SPE Headquarters.
SPE Council and Section/Division Committee meeting will be held June,2009 in Chicago, Illinois. Detailed agendas and meeting materials are available in advance from SPE Headquarters.

May

Operations

- Develop Section/Division [annual goals](#) and budget for the next fiscal year.
Submit copies to the [Leadership Services Department](#) .

June

ANTEC Preparation

- Divisions should begin organizing technical session(s) for [ANTEC](#).
Online abstract submission website opens on June 1. Visit www.antec.ws for details.

Operations

- Councilor/Proxy should review information presented at the June Council meeting with Board of Directors.
- Incoming Officers should take this time to sit down with exiting Officers to thoroughly review all requirements of their new position.