

Operational Plan

Officer name:

Section name:

This 1st generation version of the new online plan must be finished in one sitting, so you may want to print a blank copy for reference. We are planning a "save my progress" feature in a future version.

Show all fields, for printing

STEP 1: Section Plan (to be completed and sent to SAE International by October 1 of each year)

This past year, the SAE International Sections Board eliminated the shorter, "EZ" planning document, so all sections are now required to complete the entire Operational Plan.

If you need additional information to complete a segment, click the **i** icon to the left of the segment title.



Segment A: Governing Board and Section Officers (Total Achievable Base Points: 10; Bonus Points: 0)

Note: The SAE International Sections Board reduced the required governing board structure to two elected individuals -- a Chairman and a Treasurer. However, sections are still encouraged to appoint as many governing board members as needed to run the section efficiently and effectively. Additionally, each section is encouraged to participate in the SAE International Annual Nominating Committee (ANC) meeting to elect an ANC Delegate and ANC Alternate Delegate. Delegates must be Regular member grade or higher. Please note that SAE Groups are not permitted to participate in the ANC process.

Sections may combine Segments A1 by attaching a Block Diagram Organization Chart incorporating the following required information: member name, section position, lines of reporting, address, phone, fax, and e-mail for EACH member of the governing board. In addition, YOUNGER MEMBERS (age 36 and younger) should be designated on the chart by means of an asterisk or other code, which is clearly explained in a legend on the organization chart.

Is the Officer list on your SAE Section web site accurate and current?

A.1.

Do you have additional information? (optional)

Y N

Attach updated roster:

Browse...

Segment B: Financial Plan (Total Achievable Base Points: 12; Bonus Points: 0)



Sections are required to submit a Financial Plan by October 1, and a Financial Report next year (August 1) to SAE Headquarters each year or disbursement of the annual dues reimbursement will be denied. A Reserve Guideline has been developed by the Sections Board. Sections are now asked each year to show that they have a plan that will bring their section in compliance with these guidelines.

Note: Download Financial Plan worksheet here.

Please attach projected budget for the coming year (Financial Plan).

Browse...

B.1.

Will your section comply with the Financial Reserve Guideline?

Y N

Please list/describe:

B.2.

Will your section have at least two officers with check signing authority? (In the event the section treasurer is unable to perform his/her duties for some reason, another individual would have access to the section's books and checking accounts, etc.) (Note: each section is required to have a CHAIR and a TREASURER – both should be authorized to sign section checks.)

Y N

- Chair and Treasurer/ Governing Board review
- Independent outside auditor reviews
- Other

B.3. What audit process does your section plan to use this year?

Please list/describe:

B.4. Will your section make a contribution to the SAE Foundation this year?
 If so, what amount do you plan to contribute?
 * Suggested donation is \$1 per section member.

Y N

\$ total amount

Segment C: Section Programs (Total Achievable Base Points: 40; Bonus Points: 10)
 Please complete all line items of the charts below.

Please note that sections are required to conduct at least THREE membership activities per year. Refer to the Worldwide Section Operations Manual.



Scoring: 10 points will be scored if a minimum of 3 membership activities are planned and held in the year. 4 additional points will be scored for each membership activity planned and held over 4, up to a maximum of 20 additional points. 10 points will be scored if actual total average attendance meets or exceeds your total average attendance target. *The first four (4) columns are for technical activities; the "Other" column is for non-technical activities, such as family days, golf outings, etc.*

Segment C.1: Key to column definitions.



Mtg refers to the traditional section activity, usually featuring a dinner (or lunch) meeting with a technical speaker(s). Most section events will fall under this category.

Prof Dev relates to section-sponsored continuing education courses or instructional workshops.

Tour refers to company sponsored tours open to section and student members.

YM Activity is defined as a "younger member" event targeted toward members 36 years and younger (excluding students).

Other is defined as all other non-technical related activities, such as family days, golf outings, social events, etc. (optional)

C.1.	Projected Attendance Chart	Mtg	Prof Dev	Tour	YM Actvty	Other
	Number of activities planned for this section	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>
	Average attendance target predicted	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>
	Total Average Target	(weighted average of the averages)				<input type="text"/>

C.1.1 Attach additional document:

Sections can earn up to an additional ten (10) bonus points by attaching a complete list of the section's entire year's programs and activities. This list should include the meeting dates, locations, topics, speakers, tours, and any other additional events for the entire section year.

Segment D: Operations (Total Achievable Base Points: 60; Bonus Points: 24)

The following elements of operation are deemed to be critical to section success. The **Governing Board** leads and manages all section activities and looks ahead to ensure continued viability of the section (you are required to have a minimum of two officers - a Chair and a Treasurer, but are encouraged to have as many other officers as needed to ensure effective operation of your section).

Section committees accomplish tasks to achieve section goals. **Younger Members (age 36 and younger)** have fresh ideas and are a natural bridge for the section to reach students. **Section Members (age 37 and older)** provide continuity, experience, and mentoring. **Company Representatives** publicize section activities and encourage engineers at all levels within companies to be more involved with SAE. Awards programs recognize results of members' efforts for the section, and motivate future efforts. By **nominating candidates** for SAE President, Treasurer, Assistant Treasurer, and Director, sections ensure representation on SAE's highest governance bodies. **Programs** such as *A World in Motion (AWIM)* and collegiate-design activities impress the value of SAE principles upon the younger generation to ensure that sections remain viable in the future. Career assistance programs provide local members with a valuable service in a quickly changing industry, and the beneficiaries often repay through section involvement. **Local company** support facilitates corporate sponsorship of section activities and gives section activities credibility with industry.

D.1. How many Governing Board meetings will you hold this year?

D.2. What is your target percentage for Younger Members on your governing board and committees this year? %

D.3. Are you planning any special activities for Younger Members? Y N

Please list/describe:

D.4. Are you planning to have a Company Representative Program this year? Y N
Please attach list:

Browse...

D.5. Do you plan to promote membership in the coming year? Y N
Please list/describe:

D.6. Will you nominate an Outstanding Younger Member this year? Y N

D.7. Will you nominate an Outstanding Section Member this year? Y N

D.8.1 Will your section nominate candidates for SAE President, Treasurer, Assistant Treasurer, and/or Board of Directors this year? Y N

D.8.2 Will your section send a Delegate to the Annual Nominating Committee Meeting this year? Y N
(Note: Delegate must hold at least SAE Member grade)
Name, if known:

D.9. Is *A World in Motion (AWIM)* being utilized in your section? Y N
AWIM Maps

D.9.1 Will your section participate in AWIM in the coming year? Y N

D.10. Will your section participate in any math and science activities **other** than AWIM this coming year? Y N

Please list/describe:

D.11. Will your section hold an activity that will involve student members this coming year? Y N

Please list/describe:

D.12. Will your section encourage student participation at your meetings? *(Examples might be: discounted meals, special recognition, attendance incentives or promotions)* Y N

Please list/describe:

D.13. Will your section appoint a student member on the governing board? Y N

D.14. Will your section sponsor or assist local student chapters with any SAE Collegiate Design Series competitions (such as Mini-Baja, Formula SAE, Aero Design) or other small-scale student competitions this coming year? Y N

Please list/describe:

D.15. Will your section provide career assistance for your members and students this coming year? Y N

Please list/describe:

D.16. Will your section solicit company support for section activities this coming year? Y N

Please list/describe:

D.17.1 Will your section select a speaker from the "Section Speaker Bureau" (SSB)? Y N

D.17.2 Will your section hold a training seminar, with a topic/speaker selected from the "Section Speaker Bureau" (SSB)? Y N

Segment E. Leadership Development (Total Achievable Base Points: 10 ; Bonus Points: 4)



SAE offers many training resources to section officers to enhance their leadership skills. There is a correlation between the amount of training officers in a section receive and the success and long-term viability of that section. Sections should take advantage of as many of these resources as possible.

E.1.1 Will your section send at least one officer to the Section Officers Leadership Seminar (SOLS) this coming year? Y N

E.1.2 Will your section send an additional officer to SOLS this coming year (sponsored by the section)? Y N

E.2. Will your section receive feedback from your SOLS representative(s), and implement the information learned at SOLS? Y N

E.3. Will your section hold any other leadership development activities this coming year? Y N

Please list/describe:

Segment F. Communications (Total Achievable Base Points: 48 ; Bonus Points: 10)



In any organizational survey, two-way communication is essential. Successful sections must ensure that they communicate with their members, local industry, SAE Headquarters, and each other, as well as the Sections Board, through a variety of methods such as e-mail, hard copy mail, and websites, etc. This segment of the Operational Plan will help sections assess their effectiveness in this area.

F.1.1 What methods will your section use to communicate with your membership in the coming year? How far in advance of scheduled meetings?

- Mailings
- Email
- Phone

Website

Other

Please list/describe:

F.1.2. Do you plan to post events to the provided SAE International hosted website? Y N

Please list/describe:

How do you plan to communicate with the students in your section in the coming year?

Please list/describe:

F.2.

Segments F.3.1, F.3.2, and F.3.3 information.



The purpose of F.3.1, F.3.2, and F.3.3 is to encourage sections to utilize their websites for sharing information with their governing board members, section members, and SAE International. Some information that is contained in governing board minutes is sensitive in nature (e.g., persons' names and contact information) so please use caution when composing governing board minutes. If you have any items that should remain confidential to the governing board only, please consider using a password protected folder or a separate document that can be shared only between your governing board members.

F.3.1 Do you plan to notify all section members announcing your governing board meetings? Y N

F.3.2 Will you post agendas for your governing board meetings on your section website this year? Y N

F.3.3 Do you plan to post your governing board meetings minutes to your website? Y N

F.4.1 Do you plan to mail or email a copy of your governing board minutes to SAE Headquarters? Y N

F.4.2 Do you plan to mail or email a copy of your technical meeting announcements to SAE Headquarters in the coming year? Y N

F.5.1 Do you plan to conduct any public awareness campaigns in the coming year (such as the safety belt and safety seat campaign, National Engineers Week, etc.)? (Bonus points) Y N

Please list/describe:

F.5.2 Do you plan to get media coverage for your section's activities this year? (Bonus points) Y N

Please list/describe:

Do you have a long range (3-5 yr) plan?

G.1. Will you update it in the coming year? Y N Y N

Will you develop one this year? Y N

G.2. Will your section have a long-range planning committee in the coming year? Y N

Please list committee members:

G.3. Does your section have a plan for the succession of officers, or do you plan to develop a plan in the coming year? Y N

Segment H. Supplemental (Total Achievable Base Points: 0 ; Bonus Points: 6)



You may use this segment to note additional section activities, events or achievements not previously covered in this report. Bonus points will be awarded at the discretion of the graders, up to a maximum of 6 points total.

List below any additional activities, events, or other actions that your section is planning in the coming year that are not covered elsewhere in the Operations Plan.

H.1.

Thank you for completing this plan. Please print a copy for your records before submitting.

