



## **NEW PROFESSIONAL CHAPTER FORMATION GUIDE**

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## INTRODUCTION TO SME

SME considers the creation of new chapters an investment in its future and the future of manufacturing. The local chapter is a vital link between local SME members, local manufacturing communities, institutions and SME's overarching strategic goals and mission to accelerate widespread adoption of manufacturing technologies and build North American's talent and capabilities. Chapters encourage and facilitate involvement and participation in all of SME's comprehensive programs, benefits and services, which include but are not limited to:

- Virtual and in-person engagement opportunities with other manufacturing professionals, corporate executives, company management, and industry suppliers.
- An avenue to exchange information and gain knowledge in a wide variety of manufacturing areas.
- Members may pursue projects of professional interest, network, and exchange ideas, and develop management skills through active participation in their local chapter.
- SME Chapters can connect professionals and retired members with students and emerging professionals, impacting the next generation of manufacturers.
- Leadership opportunities and experience to assist in your career and personal growth.

This guide details the steps that need to be followed in creating a new SME chapter. It also explains the services and resources that are available from SME International Headquarters to assist in establishing a new chapter in your community.

## MEMBERSHIP BENEFITS

SME is the premier manufacturing organization for connecting professionals in the manufacturing industry. SME Membership benefits professionals from the beginning of their career journey until long into their retirement. Some SME benefits include:

- Access to technical resources in [Manufacturing Engineering magazine](#), [peer-reviewed journals](#), SME Membership's [newsletters](#) and [engagement programs](#), and SME [Daily Executive Briefing](#) which delivers the latest industry news to your inbox every morning.
- Access to a global network of like-minded experts through a member-only online platform, local [chapters](#), and member-exclusive activities at [SME Events](#).
- Education through a variety of [exceptional SME produced industry conferences](#), Tooling-U SME training courses, discounts on SME's [certifications](#), event registrations and technical webinars.

- Career services including bi-annual virtual career fairs, and access to SME's industry job board with early postings specifically targeted to SME members in a variety of fields.
- Networking opportunities to connect students, emerging professionals, educators, and retired professionals in the manufacturing industry.

To learn more about the benefits of SME Membership review our [membership brochure](#) visit [our website](#), or email <mailto:chapters@sme.org>.

## SME CHAPTER BENEFITS

SME is dedicated to serving our professional members in their educational, personal, and professional development. SME Chapter participation provides several benefits, including but not limited to:

- Local membership meetings, coordinated plant tours, and community service projects that build brand visibility and marketing opportunities.
- Leadership opportunities to help build your career and reach your educational and personal goals.
- An avenue to exchange information and gain knowledge in a wide variety of manufacturing areas.
- Members may pursue projects of professional interest, network, and exchange ideas, and develop management skills through active participation in their local chapter.
- SME Chapters can connect professionals and retired members with students and emerging professionals, impacting the next generation of manufacturers.

## ESTABLISHING A PROFESSIONAL CHAPTER

Establishing an SME Professional Chapter can be broken down into **four main steps**.

[Step One: Find Members](#)

[Step Two: Hold Meetings](#)

[Step three: Select Officers](#)

[Step four: Submit Paperwork](#)

### STEP ONE: FIND MEMBERS

The first step is to **find active members** in your area, as well as membership potential. SME requires that **at least 25 members** sign the attached Professional Chapter petition. This number is the minimum requirement, and having more active members from the beginning will help make the chapter successful.

To determine the membership potential of your area, consult online and in-person resources to find the top manufacturers and learn more about what they produce. There are many resources you can use, including but not limited to:

- [U.S. Bureau of Labor Statistics](#)
- [The Economic Handbook of the Machine Tool Industry](#)
- **Manufacturing & Distribution USA**
- [World Chamber of Commerce Directory](#)

If you're interested in a list of active members in your geographic area, please contact [chapters@smc.org](mailto:chapters@smc.org) to set up a virtual meeting. The SME Chapter Development Team can answer any questions you may have about the chapter establishment process and provide important insight regarding best practices.

## STEP TWO: HOLD MEETINGS

Once you have active members interested in starting a chapter, the next step is to **hold regular meetings**. To hold effective, impactful meetings with large turnout, we recommend the following:

- Scheduling meetings **at least a month in advance**.
- Following a **consistent meeting pattern** (third Tuesday of each month, for example).
- Survey members to find easy, **accessible meeting sites and times**. [Calendly](#) and [Doodle](#) are effective tools to help with this.
- Speak with and/or survey members to **determine meeting topics** that appeal to them.
- Consider **joint meetings**. Many SME Chapters hold joint meetings with other chapters to meet other members, network, and brainstorm chapter activities.

Communication is key when planning meetings, especially as your chapter continues to grow and develop. Continuously talk with members to determine ideal meeting times and locations. The SME Chapter Development Team and other chapter leaders are great resources when looking for advice on scheduling and holding meetings.

The SME Governance Document is another great resource for finding tips on hosting meetings. Any situation not specifically covered in the SME Governance Document shall be in accordance with *Robert's Rules of Order - Revised*. For a copy of the SME Governance Document, please contact [chapters@smc.org](mailto:chapters@smc.org).

## STEP THREE: SUBMIT OFFICERS

You have found members interested in founding a chapter, and you've started meeting, the next step is to officially **appoint/elect officers**. Once the officers are determined, these need to be submitted to SME National. *The required officer positions for professional chapters include:*

- Chair
- Co-Chair
- Treasurer

- Secretary

These positions must be held by **different members**, excluding Treasurer and Secretary, which may be held by the same person. Additional officer positions are available for chapters but aren't required.

Members should be made aware of the responsibilities and time commitments of each officer's position **before** they are appointed or elected. To learn more about each officer position, email [chapters@sme.org](mailto:chapters@sme.org).

When forming a chapter, succession planning is important. It is encouraged that elected officers take time during the formation process to set up a three-to five-year succession plan to ensure that there is structured and seamless transition of leadership overtime to keep up the momentum of the chapter going forward. By outlining a clear path for leadership progression, individuals can be trained for increasing responsibilities, ensuring qualified individuals are ready to step into leadership roles.

## STEP FOUR: SUBMIT PAPERWORK

Prospective Professional Chapters are required to complete the **attached petition** to SME. The petition must contain the signatures of at least 25 SME members in your geographic area who agree to commit the time and effort to ensure the success of the Chapter.

You will also be asked to submit a **Professional Chapter Application** detailing your chapter name, address, and contact information. Chapter contact information can be updated and changed upon request, and as officers change.

Once your petition meets the minimum signature requirements, and your Professional Chapter Application has been completed, please submit the documents to [chapters@sme.org](mailto:chapters@sme.org).

## CHAPTER SPONSORS

Finding a Chapter Sponsor is **highly recommended**. A Sponsoring Chapter can help your chapter financially during the establishment process and can help spread the word regarding your new Chapter. In most cases, the **existing Professional Chapter geographically closest to you will serve as the Sponsoring Chapter**. The forming Chapter must have a local Chapter Sponsor except when one of the following conditions exists:

- The local chapter agrees there is a need for the establishment of a new Forming Chapter but declines to sponsor it.
- There are no chapters in the immediate area.

Finding the closest SME Professional Chapter isn't always simple. If you're unsure which active SME Chapter is closest to you, please contact [chapters@sme.org](mailto:chapters@sme.org) for more information.

## RESOURCES FROM SME

SME has resources and programs in place that will help the newly formed chapter grow and develop. These perks include, but are not limited to:

- Access to SME Membership staff members who can provide you with best practices and/or connect you with other Chapter leaders across the country.
- Marketing toolkit containing templates for chapter emails, social media posts, event flyers, business cards, etc.

To access any of these resources, please contact [chapters@sme.org](mailto:chapters@sme.org). An SME representative will reach out to you to provide you with what you need or to answer any questions you may have.

## MEMBERSHIP TYPES

An important activity that a new chapter should begin developing is a strong membership base. Even though coordinating chapter recruitment activity is shown as a separate function, it should be a task for each member of the new chapter. Members for the new chapter can be solicited through any one of three ways:

- **NEW MEMBERSHIPS:** By far the most effective method of convincing your community to join SME is through **word of mouth**. Use your **social networks** to reach new audiences and talk to colleagues, and friends of friends.
- **TRANSFERS:** When members move, it's possible that their assigned chapter is still tied to their old address. **Members who have relocated** can go online to update their contact information and change their assigned chapter.
- **MULTI-CHAPTER AFFILIATION:** Some members are active in **multiple chapters at once**. One of these affiliations must be designated as the primary affiliation, to determine where the members' vote for International Directors will be processed. Multi-Chapter Members can **only hold office in one chapter** at a time and will only be counted in the membership totals for their primary chapter.

## FREQUENTLY ASKED QUESTIONS

**Q: Why should I start a professional chapter?**

**A:** SME considers the creation of new chapters an **investment in its future and the future of manufacturing**. The local chapter serves as part of SME's engagement with its membership, and the chapter network provides members with the foundation for involvement and participation in all of SME's programs and benefits.

**Q: Can I contact high school students in my area?**

**A:** Individual outreach to high school students in your area is not recommended. Since many of the students are still minors, contacting them individually has many legal requirements. SME recommends working with the school district, school administrators or teachers to partner on events.

**Q: Do we need a chapter bank account?**

**A:** Professional chapters must have access to a chapter-specific bank account. If you need assistance with how to establish a chapter bank account, or if you need any documents from SME to provide to the bank, please contact us at [chapters@sme.org](mailto:chapters@sme.org).

**Q: How long should this process take?**

**A:** There isn't a specific timeline. Starting an SME Professional Chapter is very different for everyone. Some chapters take a few weeks, some take several months. Just remember that progress of any kind is still progress. SME is always available to help you with any questions and point you in the right direction.

**Q: How can a sponsoring chapter help my chapter?**

**A:** Sponsoring chapters can help you with event planning and outreach, assist in finding speakers and venues, and help provide your chapter with financial support while your chapter develops.

**Q: How do I find other individuals who are interested in forming/joining the chapter?**

**A:** There are many ways to go about finding members and potential members in your area. SME recommends using the resources listed in [step one](#) to start. Sponsoring Chapters or other nearby chapters can also help by sending out outreach emails to members in your area. To receive a list of active SME members in your area, contact [chapters@sme.org](mailto:chapters@sme.org).



PROFESSIONAL CHAPTER FORMATION PETITION

I believe that an SME Professional Chapter should be formed at the following region:

Professional Chapter Information:

Name of Petitioner, Preferred Chapter Name, Mailing Address, Phone, Email Address, Member No.

If you are not currently a member, please visit our website here to join.

My signature below indicates that I agree to commit to the necessary time and effort to assure the success of this new chapter.

Signature, Date

This petition is two pages in length. Both pages must be completed and submitted to be considered for SME Professional Chapter Formation.

MEMBER SERVICES STAFF USE ONLY

Number assigned to unit

Staff initials





FORMATION  
PETITION

We, the undersigned agree to commit the time and effort to ensure success of the Forming Chapter.

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Submitted by:

Date: