



Section Leadership Toolkit

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Introduction

Purpose of Toolkit

Welcome to the **SWE Section Leaders Toolkit**. This resource is designed to support and guide you in your role as a section leader. Here, you'll find essential tools, guidelines, and information to help you navigate your responsibilities and leverage resources available from SWE Headquarters (HQ).

Proper SWE Terminology

- **SWE and WE:** The Society of Women Engineers is commonly referred to as **SWE** (which is pronounced like “sweet” without the “t”). Our annual conference is called **WE** followed by the year - e.g., WE25.
- **Headquarters (SWE HQ):** refers to the SWE staff who manage operations and support our programs, services, and members.
- **"Section" vs. "Chapter":** At SWE, we refer to our local groups as **sections**, not chapters or clubs. It is important to use the term “section” consistently when discussing our local groups and leadership roles. Using the proper language helps foster clarity and ensures alignment with SWE’s official structure.
- Section Agreement and SWE Bylaws.
 - The **Section Agreement** is a contract between SWE and the individual SWE Section, outlining the responsibilities and expectations of both parties.
 - **SWE Bylaws** - All sections operate under the governance of the Society’s bylaws. Any section procedures or guidelines must align with the Society bylaws.

Overview of SWE’s Mission & Vision

Mission: SWE empowers women to achieve their full potential in careers as engineers and leaders; expands the image of engineering and technology professions as a positive force in improving the quality of life, and demonstrates the value of diversity and inclusion.

Vision: SWE envisions a world with gender parity and equality in engineering and technology.

As a section leader, you play a critical role in advancing SWE’s mission at the local level by connecting members, fostering leadership opportunities, and advocating for women in engineering. To deepen your understanding, complete the "[About SWE](#)" course in the **Advance Learning Center (ALC)**.

Getting Started as a Section Leader

Officer Structure & Responsibilities

A section must have at least a **President, Treasurer, and Secretary**. Sections with fewer than 50 members may have the **Secretary and Treasurer as the same person** (but not the President).

Collegiate sections are required to have a **Faculty Advisor***.

Term: Section officers shall serve for a term to coincide with the Society's fiscal year (July 1 - June 30).

Duties: Officers and officer duties shall be defined and maintained by the Section in their section procedures. At a minimum, the following officer positions and duties shall be required of elected section officers:

President:

- Represent the Section before the public and preside at meetings of the Section and its executive council.
- Authorize the disbursement of Section funds within the budget approved by the executive council.
- Be an authorized signatory on all Section accounts.
- Review and approve the year-end Section financial report.

Secretary:

- Maintain the records of the Section in accordance with the requirements of the Section Agreement.

Treasurer:

- Be responsible for the collection, distribution, and safekeeping of section funds.
- Prepare, maintain, and report as directed on the financial position of the Section in relation to the approved budget.
- Submit a financial report to the Society in accordance with established procedures.
- Provide financial oversight and guidance to any committee chairs.
- Ensure section IRS filings are complete, if applicable.

*Faculty Advisor:

- Provide guidance on university policies, funding, and administrative procedures.
- Help the section maintain good standing with both SWE and the university.
- Assist in officer transitions.
- Promote SWE within the university and encourage faculty and department support.

As membership grows, adding additional officers is recommended. Additional roles that sections can consider are:

- Vice President
- Chair
 - Membership Chair
 - Outreach Chair
 - Fundraising Chair
 - Social Media
 - Communications Chair

Sections can help ensure smooth transitions between officers each year by using the [officer transition checklist](#).

Section Operations

Good Standing Requirements

Sections in good standing are eligible to receive membership rebates and apply for program development grants from SWE HQ. Per [SWE's Bylaws](#), if a section is not in good standing for two or more consecutive years, the board may declare the section inactive and revoke its ability to use SWE's name, brand or conduct business in the name of SWE. The requirements to remain in good standing are as follows:

Requirement	Deadline	Instructions
Leadership Roster	June 30	<ul style="list-style-type: none">Leaders must be paid SWE members for the fiscal year they are holding their position. Rosters can be updated in the leaders portal between April 1st - June 30th each year. Any roster updates made outside of those months must be emailed to SWE HQ.
Financial Report	July 31	<ul style="list-style-type: none">A report of the section's previous year's expenses and income must be submitted to SWE HQ through the Leaders Portal.A Conflict of Interest Form from the Section treasurer and president must be uploaded during this submission.
Section Agreement	September 30	<ul style="list-style-type: none">In the "Manage Section Agreement & Info" tab of the leaders portal, at the bottom of the page you'll find a link to the section's original agreement.Each year, the president and treasurer should read through the agreement and then indicate they have reviewed it. This is done by clicking on the pencil "edit" button and checking the appropriate box and clicking "save".

Tax Status	September 30	<ul style="list-style-type: none">● Sections/MAL that are subordinates of SWE must have an “Up-to-Date” IRS tax filing status.● Sections that are not subordinates of SWE are exempt from this requirement (unless their EIN has been revoked).● The process is fully outlined in the “Manage Section Tax Information” tab on the Leaders Portal.● Questions should be directed to sectionandaffiliate-workinggroup@swe.org.
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Best Practices

Communication

- Keep your section website and social media channels up-to-date for your members. Don't have a website? Submit your request to have a Wordpress account created using [this form](#). Visit the SWE website for more information including [FAQs](#) or to [view examples](#) of other Section websites.
- Request a [Google Groups Workspace](#) account (which includes a swe.org section email address) from SWE HQ to use as a communication platform and information repository. Google Groups allows you to manage your email list and send emails to a group with a single email address.
- Maintain **historical records** of key discussions, decisions and documents. You can keep these records in your Google Group workspace where all future section leaders can easily find.
- Schedule **regular meetings** with the section officers to share updates and encourage collaboration.

Collaboration & Events

- Engage with **other sections or affiliates** for joint events. We strongly encourage professional and collegiate sections to collaborate and work together. To find the nearest section to yours, explore the section map on the [SWE website](#).
- Publish your section's meetings and events to the [SWE Events Calendar](#) to reach more members in your community.
- Brag about your section by submitting a post to the [All Together Blog!](#) Posting your successes will increase awareness for your section and could help inspire other sections!
- Submit your meetings and events to the SWE Group Event Tracker.
- Planning an outreach event? Be sure all section leaders and volunteers have completed the [SWE Youth Protection Code of Conduct course](#).

Succession Planning

- Ensure smooth transitions between officers by using the [officer transition checklist](#).
- Develop a **mentorship structure** within your section to prepare future leaders.
- Save and communicate shared passwords for continued access to accounts.
- Consider formalizing your section's succession plan into a standardized document.
- Collegiate sections should have frequent check-ins with their Faculty Advisor.

Engaging & Recruiting Members

- The "[Building Your Section Membership](#)" course in the Advanced Learning Center (ALC) will walk you through the SWE Membership Building Strategy - an important cycle that allows sections to build and retain their membership numbers, based on research and planning.
- Leverage SWE's [member promotional toolkits](#) that contain templated copy you can use to promote SWE on social media, email, as well as shareable graphics, posters, and flyers.
- Create an inclusive and supportive environment at your section by using SWE's [DEIB resources](#).

Fundraising & Scholarships

- Learn about SWE's financial tool, [Billhighway](#), where sections can streamline financial transfers, generate reports for budgets, and simplify event management with built-in tools. As each section officer role is updated in the SWE database, Billhighway activation codes are automatically sent, allowing you to activate your account and set up your username and password. If you missed or did not receive the Billhighway activation email, you can send yourself a new Billhighway activation code email by clicking "Send me a new activation code" from this [link](#). We recommend starting with this [Billhighway onboarding checklist](#).
- Apply for a [Program Development Grant](#) to support your section's outreach and professional development activities. Grant requests can be anywhere between \$250 and \$5,000 and will be considered in three application cycles per year. Sections that receive a grant will receive the funds directly into their Billhighway account.
- The "[Fund Development & Your SWE Section](#)" course was created to help section leaders at any stage of their SWE career master basic concepts of fund development.
- Make sure your section is in good standing so that it's eligible to receive a [rebate payment](#). Rebates are payments made to your section from HQ that are calculated on the number of new and renewed members your section has. They are calculated twice per year; once in October for memberships purchased between April 1st and September 30th, and the 2nd in April, for memberships purchased between October 1st and March 31st. Sections MUST be in good standing to receive rebates.
- If your section funds and awards scholarships, be sure that it's added to the [SWE website](#) to get more visibility.

Resources & Support

- [Advance Learning Center \(ALC\)](#) - Free professional development for members.
- [Leadership Competency Model](#) - Take your leadership skills to the next level with an individualized learning plan built from SWE's leadership competency model.
- [Leaders Portal](#) - An online platform to assist section leaders in managing their administrative responsibilities and ensuring compliance with SWE's good standing requirements
- [Logos](#) - Your section logos are available for download from the SWE website. For direction on how to effectively use your section logos, please refer to the [brand guidelines](#).
- [Templates](#) - SWE has created templates for professional and collegiate sections to use on social media and email, as well as shareable graphics, posters and flyers. View and download them from the [SWE website](#).
- **Webinars and Events** - SWE is working to create more opportunities for section and affiliate leaders to connect with one another. Be sure to keep an eye on the [SWE Events Calendar](#) for upcoming webinars and events.
- **Section Leader Newsletter** - A monthly newsletter is sent to every section president, treasurer, faculty advisor, and counselor and includes important reminders about good standing requirements, resources and events for section leaders, and announces when new sections are chartered. The newsletter is emailed on the first Tuesday of each month.
- **Office Hours** - Take advantage of our Section Leader Office Hours - an open space for all section leaders to ask questions about their role or a section topic. Office hours will be hosted frequently throughout the year and will be promoted in the Section Leader Newsletter and on the [event calendar](#).

FAQs

What is the leaders portal and how do I access it?

The leaders portal is an online platform where section officers can access key resources, submit reports, and track your section's standing. You can access the leaders portal directly at this link <https://portal.swe.org/leadership/s/> or from the "leaders" button in your [SWE portal](#).

I don't have access to the leaders portal. What should I do?

Please email sections.affiliates@swe.org with your name, section name, and leadership position.

How do I check to see if my section is in good standing?

Login to the [SWE Leaders Portal](#) and check the "Section Standing Status" button to see if you are in good standing. If a checkbox is missing for the current fiscal year, that means your section still needs to complete that requirement and won't be considered to be in good standing until all boxes are checked and that your "Current IRS Standing" is either "up-to-date" or "not applicable". Reach out to sections.affiliates@swe.org with any questions about your section's good standing status.

What happens if my section is not in good standing?

Only sections in good standing are eligible to receive membership rebates and are eligible to apply for program development grants. Per SWE's Bylaws, if a section is not in good standing for two or more consecutive years, the board may declare that section inactive and you would lose your ability to use SWE's name, brand, and conduct business in the name of SWE.

What do we do if officers need to be updated mid-year?

Please email your officer updates to sections.affiliates@swe.org any time there is a change in section leadership. This will ensure that the correct officers always have access to the leaders portal.

SWE Contacts

SWE HQ is dedicated to ensuring the success and longevity of your section. Jessica Ames, SWE HQ's Section Relations Manager is a great resource to help answer questions or provide guidance. Contact Jessica at jessica.ames@swe.org. For additional support, reach out to:

- **SWE HQ:** membership@swe.org
- **SWE Section & Affiliate Support - HQ:** For assistance with section operations, leadership transitions, or maintaining good standing, contact: sections.affiliates@swe.org
- **SWE Section & Affiliate Support - Working Group Volunteers:** For assistance with section finance, operations, or section specific training, contact: sectionandaffiliate-workinggroup@swe.org or submit an inquiry to them through [this form](#).