



COLLEGIATE CHAPTER CREATION & INITIATION CHECKLIST

Prepared by:
SASE National CPC
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Introduction

Dear future SASE leader,

Thank you for your interest in starting a SASE Collegiate chapter at your school. I'm sure you're well aware of all of the great benefits being a SASE chapter offers you, your fellow leaders, and your organization members. Registering your school is the first step in taking advantage of everything our growing organization has to offer.

SASE National has compiled this Onboarding Checklist to help you ensure your chapter registration is smooth and its subsequent execution is successful. Keep in mind that the checklist outlined in this document applies to the majority of schools, but may not cover the specifics of your school. As a result, if you have any questions at all, please feel free to email your Regional Manager (RM) or myself. Your Regional Manager can be found on our website at <http://saseconnect.org/about-sase/rmrcleadership>.

Once again, thank you for your interest in SASE. We are looking forward to working with you on establishing a successful SASE Collegiate chapter at your school and helping you and your members tap into the professional, networking, leadership, and social opportunities SASE provides.

Talk to you soon!

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New Chapter Checklist

Phase 1: Planning

- Become acquainted with SASE's overarching vision, mission, goals, and organizational structure. In case you don't know SASE's mission, it is 3-fold:
 - o Prepare Asian heritage scientists, engineers, and technologists for **success** in the global business world.
 - o Celebrate **diversity** on campuses and in the workplace.
 - o Provide opportunities for members to make contributions to their local **communities**.
- Start thinking about your school's current student organization ecosystem and define your SASE chapter's mission to best fit into the existing market by leveraging the many benefits SASE provides.
- Which on campus organization(s) will you want to be recognized by? You may be able to be recognized by multiple groups. (Student Government, Student Activities, College of Engineering, Multicultural Office, etc.)
- Write out the pros and cons with being associated/recognized by the above university group(s). Ask a lot of questions.
- Build friendships with SHPE, SWE, NSBE and one or two professional society chapters (IEEE, AIChE, ASME, etc.). Ask them about their experience with the organization in which they are recognized.
- Contact and schedule a call with the SASE Collegiate Program Coordinator and the Regional Manager** to walk through your chapter's proposed mission, value proposition, and market analysis. This will make sure all parties involved are on the same regarding the strategies the chapter will take in the following year. You can find out who your Regional Manager is on our website: <http://saseconnect.org/about-sase/rmrcleadership>.
- Recruit members who are motivated to support and drive the SASE chapter's goals and objectives. At least eight of the members in the chapter should be majoring in either engineering, biology, chemistry, physics or a related scientific field.
- Recruit a faculty or administrative advisor** who is committed to the development of students of Asian and Pacific Islander heritage. Many schools have chosen to have one of each to improve their resources and advice.
- Set up an informational meeting with your founding members and advisor to discuss SASE's mission and goals, develop chapter bylaws and to allow time for feedback from

interested members. Appoint a temporary secretary to keep track of the official Minutes of the meeting.

- Set up a meeting and **elect your chapter's founding leaders**. Men and women from all ethnic backgrounds are welcome to join the organization and serve as officers.
- Complete [SASE's Bylaws document](#) (SASE Chapter Bylaws.docx)
- Complete SASE's [New Chapter Registration Form](https://goo.gl/2ch4QA) (https://goo.gl/2ch4QA)
- E-Mail completed Bylaws** to your RM and notify them of your completion of the New Chapter Registration Form.
- The officers should work with the members to develop a strategy to accomplish the chapter's goals and objectives. It is advised to do this in conjunction with the Chapter Year Start Form below.
- Complete, submit, and notify the RM regarding the completion of the Chapter Year Start Form**. This document is structured to help you and your officers plan your chapter's course of action using a few common, but powerful, strategic planning techniques (i.e. OGSM & SWOT).

Link for Chapter Year Start Form: <https://goo.gl/olOQfL>

- Obtain a copy of your school's policies and procedures for starting a new student organization. This information should be available through the office responsible for student groups. This could be the Office of the Dean of Students, the Director of Student Life, the Student Activities Coordinator, or an equivalent office. **Complete all of the paperwork and submit it to the appropriate office.**
- Setting up a student organization bank account is very important.** Your campus may require this step before being formally recognized. You can set up a bank account through the same on-campus office that provided the registration documentation if at all possible. For most schools, if you are an official recognized organization in the university, then you can use the university's 501(c)3 nonprofit status to open the checking account.
- Check with other similar organizations on campus (such as Society of Women Engineers, Society of Hispanic Professional Engineers, and National Society of Black Engineers) to see where they have their school account and what their experience has been. Ask them how they move money around and which tax ID they use. If your school does not offer this service or does not allow a nationally recognized student chapter to have an account, contact us and we will try to work with you to resolve this issue.
- Check with other similar organizations, as well as your advisor(s) about how many university organizations/departments/colleges/offices offer funding for student chapters and what are the rules to receive that money. What has been their experience with getting financial support?

Phase 2: Registration

- Email SASE National a letter on official letterhead from your governing department that states that your chapter has been officially recognized on campus.
- The SASE National team will review the four documents above (Bylaws, Registration, Year Start, and Letterhead). All of the documents will be thoroughly considered to ensure quality and accuracy. The SASE National team will contact the chapter President if there are any discrepancies and if the application does not meet all the necessary requirements to qualify for official status. If the application does not meet the requirements, it will be returned. After the revisions have been made, the application must be resubmitted for review and will be treated as a new application.
- Once the application has been approved, the SASE National team will contact the chapter President to inform him/her of their status as an official chapter. A formal letter of recognition will be sent to the chapter president and advisor.

Phase 3: Growth & Participation

- The chapter members should develop a plan of activities for the school year. Chapters are encouraged to look for opportunities to interact with representatives of the SASE member companies.
- Join the regional calls set up by the Regional Manager and your Regional Coordinator. Hosted once a month, these calls allow collegiate chapters to share best practices and plan joint events. Use this opportunity to ask for help from other chapters- chances are they've faced similar challenges before.
- Send your leaders and members to SASE's National and Regional Conferences. Not only do these major SASE events draw participants from multiple schools and sponsor companies, they provide great professional and networking opportunities through workshops, speakers, career fairs, and mixers.

Phase 4: Initialization

- Once your SASE chapter has been established at the college level, the leaders need to start focusing on strategically identifying the audience for your SASE events. This can be done by participating at your college club fairs, freshman events, through social media (Facebook event page), talking to your friends, and a simple word of mouth. Generating an email list of people who are interested in SASE will be beneficial for audience involvement and participation during future events. You should ask your advisor(s) or

where your organization is recognized (Student Org Office/College of Engineering etc) if they can get an email list of Asian heritage STEM students so you can send an introductory email (with information about the 1st meetings, etc.).

- Develop your chapter's Corporate sponsor and Professional network. Contact companies that are part of SASEPro, if available in your area, as well as local companies that hire at your college career fair. Market the opportunities that SASE offers and how they can get involved. You should reach out to the Career Center and Alumni Foundation/Office to ask them for a list of potential speakers and corporate connection (don't tell them that you are asking for money). Having a Corporate Partnership package for funding can be very useful when interacting with company representatives. Here is an example: (<https://goo.gl/VddBja>)
- Hold your first Executive Board meeting and talk about the possible events that you are planning on holding. It is a best practice that the President of the SASE chapter comes prepared with an agenda to guide the rest of the E-Board. Your team should share each person's vision for the chapter and what SASE should do to help the members. Have action items and set deadlines to ensure all goes well during the event. Some things to focus on during the initial meeting:
 - Reserving rooms and necessary equipment for a general body meeting
 - PowerPoint presentation promoting the mission of SASE and all that it offers for its members during the kick-off meeting (template available if needed)
 - Opportunities to attend the next SASE National Conference
 - Your SASE chapter goals and what you plan on accomplishing at your campus
 - Professional Development and Leadership opportunities
 - Membership Dues
- Following the kick-off meeting, start thinking about holding Professional/Social-Cultural/Volunteering events for your SASE chapter.
 - Professional Events: Resume Critiquing, Interview Prep., Networking Sessions with Companies
 - Social-Cultural Events: Board game nights, Potluck, Minute to Win it challenges, Cultural Fest
 - Volunteering Events: Food drive, Operation Christmas Child, Soup Kitchen
 - Partner up with other organizations at your campus and participate in similar activities! Hold activities with SHPE, NSBE, SWE etc., and promote SASE.
- Market SASE through SASE swag (Pens, Padfolios, T-shirts, Polos, etc.). SASE National can provide you with some SASE goodies that you can give away to members.

Also, get your chapter's name out through social media by creating a Facebook page for your chapter and all the events that you plan on holding. Please note, we ask that you refrain from using the SASE logo on social media until SASE National officially recognizes your chapter.

- Download the brand assets to ensure that your chapter is in accordance to National SASE's branding guidelines:**
(<http://saseconnect.org/branding/download-brand-assets>)

- Plan fundraising events, explore school grants and department funding for sponsorship to attend SASE national/regional conferences.

- Be sure to begin thinking about your leadership transition process.** Our strongest chapters tend to have their transition process planned and marketed well in advance. Ask your SASE Regional Coordinator and/or Regional Manager for advice based on their experience working with other chapters to make sure that your hard work continues long after you've graduated.

- Above all...have some fun!