



# New Chapter Orientation

SHPE Member Experience and Chapter Operations



# AGENDA



SHPE Staff & RLT

SHPE Connect- demo

Chapter Resources

Chapter Operations

National Chapter Program

Upcoming Events

Responsibility

# Introduce Yourself in the Chat

Name, Chapter, Role, A goal  
for your chapter this Year

# SHPE Staff & Regional Leaders



[LINK](#)



# Research & Impact



Dr. Kimberly D. Douglas

## Research & Impact Office Chief Research & Impact Officer

- Membership, Member Engagement & Operations
- Chapter Operations/Governance
- Regional Leaders
- Ongoing Cornerstone and New Programming
- Special Interest Programming (Graduate, SHPEtina)
- Academic & Research Partners
- Academic Partnership Council (APC)
- Grant Proposals (e.g., NSF, NASA)
- Government Relations

### Membership@shpe.org

- SHPE Connect
- Member Engagement
- Bulk Membership Purchases
- Lifetime Member Form
- Member Data Inquiries

### Chapters@shpe.org

- National Chapter Program
- Chapter Applications
- Noche de Ciencias Grants
- Chapter Onboarding
- Chapter Leader Training

### ShpeOnTheHill@shpe.org

- Engaging Member of Congress
- SHPE Hill Day
- Federal funding opportunities

### Research@shpe.org

- InternSHPE
- MentorSHPE
- Equipando Padres
- Virtual STEM Labs
- New Programming
- Grants
- Research and Data Analysis
- Survey

# Membership Points of Contact



Ashleigh Tierney

- Undergraduate members + student chapters
- RVP point of contact and monthly meetings
- Support Chapter Advisors

ashleight@shpe.org



Anna Patrick

- General Member Experience
- Chapter Operations
- RSR/RGR point of contact and monthly meetings

annap@shpe.org



Dr. Dayna Martínez

- Graduate members and faculty
- RGR point of contact

daynam@shpe.org



Fernando Hinojosa

- SHPE Jr members + chapters
- RJR point of contact and monthly meetings

fernandoh@shpe.org



Susan Arnold Christian

- Professional members + chapters
- Supports RVP monthly meetings

susanac@shpe.org



Schedule a time with us!  
[bit.ly/SHPE\\_Membership](https://bit.ly/SHPE_Membership)



# External Relations



Monique Herrera

## External Relations Office

### Chief External Relations Officer

- External Fund Development (corporate partners, sponsors, foundations)
- Industry Partnership Council (IPC)
- Individual Philanthropy/Major Gifts
- Career Services
- Marketing & Communication
- Contracts
- Scholarships
- Career Fair at Signature Events
- 50<sup>th</sup> Celebration
- National Convention Travel Stipend

#### Partnerships@shpe.org

- IPCs
- Sponsorships
- Supporter Network
- Signature Event Career Fairs
- NILA Sponsorships
- Sponsor Registration for Signature Events
- STAR Awards and STEM Luncheon tickets

#### Marketing@shpe.org

- Logos & Branding
- Graphic Design
- Podcast
- Newsletters
- Social Media
- Text Messaging
- Website

#### Donations@shpe.org

- Donations/gifts
- Individual giving
- In-Kind Donations
- Employee Matching

#### CareerCenter@shpe.org

- Job postings
- Help posting resume
- Virtual resume review going into NC

#### ScholarSHPE@shpe.org

- Application support
- Award questions



# Administration



Rhonda McNeil

## ADMINISTRATION OFFICE

### Chief Administration Officer

- Finance
- Facilities
- Sourcing
- Information Technology (IT)
- Signature Events
- Mercado

Events@shpe.org  
Housing@shpe.org

- Event questions
- Housing questions
- Chapter/Regional event support needs
- Regional event at National event
- Access portals report
- Note: retiring [NILA@shpe.org](mailto:NILA@shpe.org) after this year's event

Registration@shpe.org

- Event registration questions
- Bulk registration codes & questions
- Issues with SHPE provided discount codes

Finance@shpe.org

- Regional budgets
- Chapter pass through
- Profit sharing
- Bill.com accounts

IT@shpe.org

- SHPE email, teams, MFA
- Software, Access, Support

Mercado@shpe.org

- General swag
- Regional swag
- Chapter swag
- Graduation stoles
- Regional awards

# Regional Leaders

## Regional Vice President (RVP)

- Support professional members/chapters
- Lead regional team

## Regional Student Representative (RSR)

- Support undergraduate members and student chapters

## Regional Graduate Representative (RGR)

- Support graduate members and student chapters

## Regional Jr Representative (RJR)

- Support Jr chapters and NdC events



[LINK](#)

## Contact:

RVP#@shpe.org (e.g., [rvp1@shpe.org](mailto:rvp1@shpe.org))

RSR#@shpe.org (e.g., [rsr2@shpe.org](mailto:rsr2@shpe.org))

RGR#@shpe.org (e.g., [rgr3@shpe.org](mailto:rgr3@shpe.org))

RJR#@shpe.org (e.g., [rjr4@shpe.org](mailto:rjr4@shpe.org))

# SHPE Connect Demo



[LINK](#)

# Tips for Successful Chapters



## **From Staff & RL**

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- **Lead your chapter as a democracy**
- **Set goals and clear expectations, leverage skills**
- **Have meeting agendas, take meeting minutes, share them**
- **Plan to formally and informally get member feedback throughout year**
- **Escalate issues to (chapter advisor) and regional team when needed**
- **Review chapter bylaws annually**



## From Peers

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- **Work as a team: hold regular eboard meetings with specific task**
- **Plan**
- **Communication**
- **Delegation**
- **Create sheet with tasks and tracking responsibility**
- **Start succession planning now**
- **Be flexible when things do not go as planned**
- **Have fun**
- **Ask questions and for help**
- **Be confident and empathetic**



**When you step into any event, be it within the university related or the professional realm, carry with you the radiant torch of SHPE. Let its light illuminate every conversation, and every connection you make. Let each interaction be an opportunity to weave more souls into the vibrant tapestry of our community. Embrace the pride that comes with being part of this remarkable group. Feel the pulse of empowerment coursing through your veins as you champion the cause of our marginalized communities. With every word spoken, and every hand extended in welcome, you are not just representing SHPE; you are embodying hope and possibility for every aspiring Hispanic engineer out there. Each moment spent spreading awareness, fostering inclusion, and igniting passion in STEM is a brushstroke on the canvas of someone's dream. So, stand tall, speak boldly, and let your actions speak of the transformative power of unity and purpose. Together, we are not just making dreams known; we are turning them into vivid realities.**

# Chapter Resources



[LINK](#)



# Chapter Resources

Membership   **Chapter Reporting**   Programs   Branding   Marketing

Outreach

### Chapter Reporting

- Chapter Reporting Guidelines and Rubric →
- Chapter Management Tool →
- Chapter Report Template →
- Quarterly Check-In Submission Link →
- Chapter Sponsorship Template →
- Check-in: How to Calculate Impact Numbers →
- Q1 Check-in Questions →
- Q2 Check-in Questions →
- Q3 Check-in Questions →
- Q4 Check-in Questions →

We're the largest association in the nation for

## HISPANICS IN STEM

We try our best to meet each of our student and professional members where they are—offering effective training, mentorship, and programming for our vibrant community.



### SHPE 101 for Chapter Leaders

SHPE  
22 videos 115 views Updated today

Play all   Shuffle

This series of videos is created for chapter leaders to introduce them to SHPE, chapter operations and strategies to ensure that they excel as a chapter leader.



# CHAPTER LEADER

# Chapter Leader Monthly Training Schedule

“SHPE teaches SHPE”

Topic	Day & Time	Zoom Link
Marketing & Recruitment	9/18 1pm ET	<a href="#">Join Here</a>
Member Engagement	10/2 8pm ET	<a href="#">Join Here</a>
Chapter Reports	12/18 1pm ET	<a href="#">Join Here</a>
<i>Chapter Report office hours</i>	1/6 2pm ET	<a href="#">Join Here</a>
	1/7 8pm ET	<a href="#">Join Here</a>
Retention	2/5 8pm ET	<a href="#">Join Here</a>
Elections	3/5 1pm ET	<a href="#">Join Here</a>
Transition	4/2 8pm ET	<a href="#">Join Here</a>

# Chapter Operations

Bill.com account, NdC Grant,  
Chapter Leader MentorSHPE,  
Chapter Programming

# Engage with SHPE!

Subscribe to the weekly newsletter, SHPE Nation



A preview of the SHPE Nation newsletter. The header features the SHPE logo with "5 YEARS" and "EST. 1971" above it, and the text "Leading Hispanics in STEM". Below this is the word "NATION" in large, bold, yellow letters, with a map of the United States integrated into the letter "I". A yellow banner below the header says "Join us in celebrating 50 years of leading Hispanics in STEM &gt;". The main content area has a dark blue background and includes a section titled "50 Member Stories for 50 Years" featuring a photo of Wendy Haro and the text "50 MEMBER STORIES FOR 50 YEARS FEATURING WENDY HARO". Below this is a section titled "SHPE BY THE WAY" with a photo of a group of people and the text "SHPE BY community chapter's g convention chapter's efforts culminated in bringing 50 students to the 2023 National Convention in Salt Lake City, where they not only networked and developed". A QR code for "SUBSCRIBE TO SHPE NATION" is overlaid on the bottom right of the newsletter preview.

## Follow us on social



INSTAGRAM  
@shpenational



LINKEDIN  
@shpe



FACEBOOK  
@shpenational



TWITTER/X  
@shpe



# Chapter Leader Check List

**1) UPDATE YOUR CONTACT INFORMATION  
ON SHPE CONNECT**



**2) SUBMIT THE CHAPTER OFFICER JOTFORM**



**3) SUBMIT THE BILL.COM  
ACCOUNT SET-UP JOTFORM**



# Bill.com Account

**ALL** chapters need to set up a bill.com account to receive payment for **award prizes, donations/gifts, professional profit sharing.**

**< 50%** of current active chapters have bill.com accounts

Process:

- Submit bill.com [JotForm](#)
  - Tip: Use permanent email ([SHPEpresidentUH@gmail.com](mailto:SHPEpresidentUH@gmail.com)) so that the account is always accessible by your board
- Create bill.com account after receiving the email prompt
- Input banking info and/or mailing address for check

Pro-Tip:

Providing bank information ensures a smooth transfer of money!



# Noche de Ciencias Grants

SHPE has reimbursement money to support YOUR pre-college outreach events!

Event doesn't need to be titled Noche de Ciencias or Día de Ciencias, but it must contain NdC or DdC branding. For example, it could be "XXX Sponsored by Noche de Ciencias"

Equipando Padres is NOT a requirement to receive funding

- Up to \$1000 for a minimum of 50 participants
- Up to \$2000 for a minimum of 100 participants
- Up to \$3000 for a minimum of 150 participants
- Up to \$4000 for a minimum of 200 participants



LINK: <https://shpe.org/engage/programs/noche-de-ciencias/>

# Chapter Leader MentorSHPE

## Presidents and Vice Presidents

8/1-8/19

- Sign-up to Participate

8/21

- On Demand Training Available

8/28

- Training Deadline

9/3

- Mentoring Connections Start

Sept-Nov

- Mentoring Connections



# Elevating Chapter Programming

We want to elevate the amazing work that is happening at our chapters by providing the opportunity for all members, regardless of location and chapter affiliation, to join virtual/hybrid events hosted by chapters so that the SHPE Familia can grow together.

**SHPE Familia Calendar**

Today < > July 2024 ▾

MON	TUE	WED
1	2	3
8	9	10
15	16	17
22	23 ● 6pm Meet the SHPE CEO for	24
29	30	31

Events shown in time zone: (GMT-05:00) America, Chicago

# Chapter Logos & Brand Guidelines



[LINK](#)

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SHPE Branding

  
Demographics

  
Sponsor

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## SHPE Branding

- SHPE Brand Logos, Fonts, Guidelines →
  - SHPE Brand Guidelines →
  - SHPE Chapter & Region Specific Logos →
  - SHPE Social Media Guidelines →
  - SHPE Program Logos →
  - 2023 National Convention Style Guide →
  - LinkedIn Banners →
-

# National Chapter Program

Check-ins, Reports, and  
Awards



## Check-ins ([LINK](#))

- One link in Survey Monkey for all check-ins that opens on 8/1 for entire year
- Deadlines: 10/15, 1/15, 4/15, 6/15
- **4 Required to remain in good standing**
- Goal: pulse check, identify programming for NILA & monthly training sessions

## Reports

- Optional but required for award eligibility
- Goal: Show intentional design, execution, and reflection of programs/initiatives
- Letter of Recommendation requirement removed
- Deadlines: 1/15 and 6/15
- Sections:
  - Chapter Highlight, Member Recruitment, Member Engagement, Member Success, Support Needed

## Chapter Awards

- **Gold: 90+% combined score on reports**
- **Silver: 80+% combined score on reports**

# Chapter Reporting Results for FY24

	Q1	Q2	Q3	Q4	Total
# Events/Programs	1,498	1,971	1,379	862	5,710
# Outreach Visits	193	374	295	210	1,072
# Community Outreach Hours	2,739	8,069	6,787	4,740	22,335
# K-12 Students Impacted via Outreach	3,083	8,329	7,061	4,635	23,108
# Parents Impacted via Community Outreach*				1,027	1,027
# Mentors Participating in MentorSHPE	746	1,053	1,249	567	3,615
# Mentees Participating in MentorSHPE	993	1,311	605	619	3,528
# Hours Supporting SHPE Mission	44,741	54,234	54,726	39,672	193,373

\* New question asked in Q4

# Upcoming Events

Fiestas, National  
Convention, NILA



# 10 City 50<sup>th</sup> Anniversary Fiesta Tour



- August – Minneapolis Area on 8/22/24
- September – Chicago Area on 9/26/24 (SOLD OUT)
- October – Atlanta Area on 10/10/24

All ticket revenue collected (minus service fees) will go to our ALL-IN SHPE Relief Fund to help members in need.



# National Convention

## Why attend the National Convention?

- Career Fair
- Workshops
- Competitions= prize \$\$\$
- Networking
- Mercado



## ACC Tri Level Floor Plan Diagram



### LEGEND

- EXHIBIT SPACE
- MEETING ROOM
- PRE-FUNCTION SPACE
- TERRACE/PLAZA



# NC Agenda

## Agenda Overview

### 30 WEDNESDAY OCTOBER

IPC Meeting

Resume Print Stations Open

**Registration Opens 8 AM**

Convention Readiness Sessions

Academic Olympiad Challenge

Community Gatherings

General Workshops

Graduate Networking Session

Advisors Networking Session

Chapter Leaders Celebration

SHPETinas Track

Opening Ceremony

Hospitality Suites

### 31 THURSDAY OCTOBER

Interviews

General Workshops

Inclusion Track

Graduate Track

Community College Track

Professionals Track

SHPETinas Track

SHPETech Track

STEM Luncheon

Professionals Luncheon

Sponsor Spotlight Lunches

Academic Olympiad Challenge

STEM Research Challenge

Grad Thesis Competition

Cybersecurity Challenge

National Meeting

Hospitality Suites

Advanced Degree Showcase

Professional and Experienced  
Hires Showcase

LGBOQ Pride Celebration

Professional Networking Reception

SHPETinas Networking Reception

Competitions

Registration opens  
at 8 am

### 01 FRIDAY NOVEMBER

Interviews

Competition Awards Presentation

Ribbon Cutting Ceremony

Career Fair & Graduate School Expo

Sponsor Industry Luncheons

SHPETinas Luncheon

Executive Panel Session

General Workshops

Community College Track

Graduate Track

Inclusion Track

Advisors Track

Professionals Track

Entrepreneurship Track

SHPETinas Track

SHPETech Track

STAR Awards Gala

Lifetime Members Special Event

Student Social Networking

### 02 SATURDAY NOVEMBER

Career Fair & Graduate School Expo

Interviews

Life Skills & Wellness Track

General Workshops

SHPETinas Track

IPC Celebration

Closing Celebration

Closing Ceremony

Career Fair Friday  
and Saturday



# National Convention

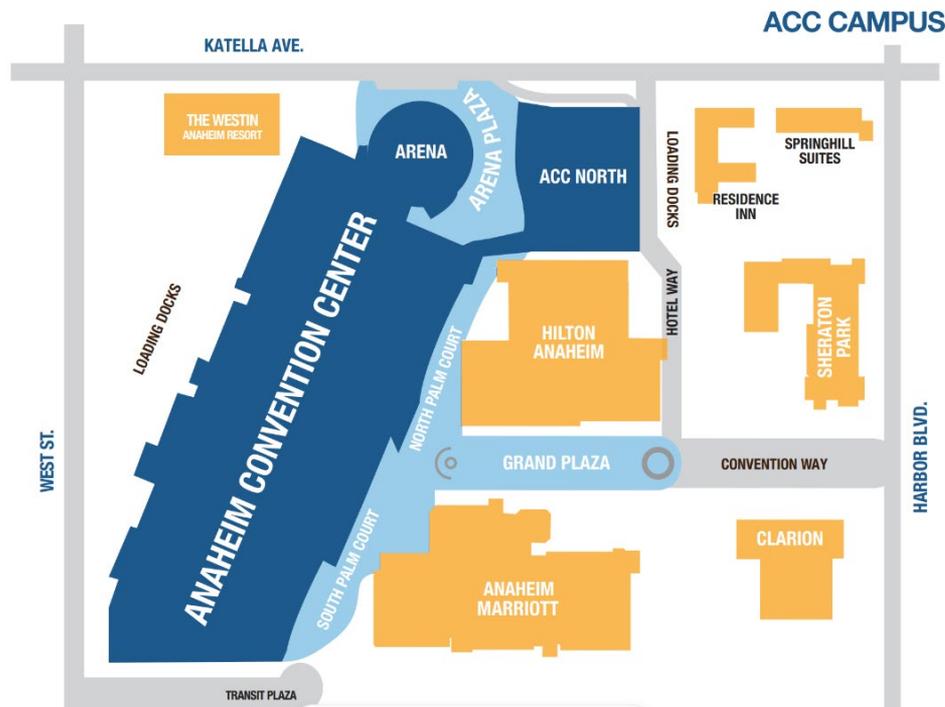
## Registration Cost:

Students: \$200 before 9/15  
\$325: 9/16-10/16  
\$525: 10/17-10/29

Professionals: \$350 before 9/15  
\$475: 9/16-10/16  
\$675: 10/17-10/29

National Convention Room Rates:  
\$179.00 to \$289.00 per night

Airports: SNA (Orange County/Santa Ana)  
LAX (Los Angeles)  
LGB (Long Beach)  
ONT (Ontario/San Bernadino)  
BUR (Burbank)





# NILA (National Institute for Leadership Advancement)

1

## PART ONE:

### CERTIFIED CHAPTER LEADER PROGRAM

For all chapter leaders/e-board members and regional leaders.



**(VIRTUAL)**

### What You'll Leave With:

- ✓ Easy-to-apply Information about SHPE's mission, vision, and strategic plan; as well as, programs and events
- ✓ A plan started for chapter operations and community engagement (Chapter Management Tool)
- ✓ Access to SHPE resources and chapter toolkits
- ✓ An established, supportive peer network

2

## PART TWO:

### PRESIDENTS SUMMIT

For chapter presidents and regional leaders.



### You'll Leave With the Ability to:

- ✓ Identify and analyze cultural identities to enhance your leadership style
- ✓ Formulate approaches to solve and overcome challenges
- ✓ Communicate your authentic leadership style to others in a more compelling way
- ✓ Distinguish external forces of conscious and unconscious biases, and the internal forces that create tensions for many Latinos
- ✓ Review and apply insights from highly successful Latino executives
- ✓ Engage with various partners to problem-solve through collaboration
- ✓ Understand your personal leadership skills and leadership style



# Accountability & Liability

Legally- what is important  
to know?



# Keeping Our Focus

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- SHPE's purpose and mission meet the legal definition of a charitable organization.
- SHPE is recognized as a 501(c)(3) nonprofit by the IRS.
- Responsibility to ensure that **ALL** activities and operations are in line with SHPE's stated purpose and mission.
- SHPE's charitable purpose and governing structure is detailed in the bylaws ([shpe.org](http://shpe.org)).



# Keeping Our Focus

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- REMINDER - SHPE's mission is to change lives by empowering the Hispanic community to realize its fullest potential and to impact the world through STEM awareness.
- SHPE's overarching purpose includes developing funds for educational purposes and scholarships, sponsoring seminars and conferences, informing the public of career and educational opportunities and promoting the interests of its student and professional members. ([Bylaws, Section 3.2](#))
- SHPE's chapters were created to maintain and grow relationships supporting SHPE's mission and purpose. ([Bylaws, Section 10.1](#))



# Volunteer Leadership Duties

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Applies to **ALL** National, Regional, and Chapter Board Members/Positions

1. Duty of Care
2. Duty of Loyalty
3. Duty of Obedience

Volunteer Leadership Liability – “Business Judgement Rule”

Volunteer leaders who meet their “duty of loyalty” and “duty of care” will not be held liable for monetary damages based on the performance of their duties in good faith as volunteer leaders.



# Duty of Care

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- Be informed and ask questions.
- The duty of care describes the level of competence that is expected of a volunteer leader and is commonly expressed as the **“duty of care that an ordinary prudent person would exercise in a like position and under similar circumstances.”**
- This means that a volunteer leader owes the duty to exercise reasonable care when he or she makes a decision as a steward of the organization/region/chapter.



# Duty of Loyalty

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- Show undivided allegiance to SHPE.
- A standard of faithfulness; a volunteer leader must give **undivided allegiance when making decisions** affecting the organization.
- A volunteer leader can never use information obtained as a member for personal gain and **must act in the best interest of the organization.**
- Volunteer leaders must comply with policies regarding code of conduct and ethical behavior.



# Duty of Obedience

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- Requires volunteer leaders to be **faithful to the organization's mission**.
- Not permitted to act in a way that is inconsistent with the central strategy, goals, operations of SHPE.
- A basis for this rule lies in the public trust that SHPE will manage donated funds to fulfill the organization's mission.



# When You CAN Be Held Liable

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- Damages for self-dealing transactions.
- Making or allowing prohibited distributions of charitable assets.
- Acts or omissions that are intentional, reckless, grossly negligent, outside of the scope of their duties or not made in good faith.
- Knowing or should know that a condition under their Region/Chapter's control could cause harm but negligently fail to take action to avoid the harm.



# Local Activities & Duty of Loyalty

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## SHPE Representative

- Always representing SHPE
- Be aware of all social and professional interactions

## Chapter Activities & Local Engagements

- Lead by example, code of conduct compliance
- Ensure your chapter activities are aligned with SHPE National's strategic plan



# Communications & Duty of Loyalty/Care

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## Communications

- Professional at all times
- Things in writing and on social media are “out” and available

## Social Media

- Your voice should be aligned with SHPE, regarding SHPE topics
- Social media is NOT the vehicle to “air dirty laundry”



# Other Consequences

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## Termination of Chapter Status

- Any chapter (i.e., Professional, Student, or Junior) may be terminated by the National Board for reasons deemed sufficient for such action. A terminated chapter shall no longer be entitled to be associated with SHPE, nor receive benefits of association with SHPE, nor use the SHPE name, logo, tagline, etc. ([Bylaws, Section 10.1.6](#))

# Thank you!

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