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Financial Report & Section Election Guidance from SWE HQ

1 message

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MEMBERSHIP LEARNING SCHOLARSHIPS AWARDS K-12 OUTREACH PARTNER WITH SWE

Recipient Information:**Primary Recipients:** Collegiate, Professional, and MAL Presidents and Treasurers**For Information Only Recipients:** Collegiate Counselors and Faculty Advisors, Professional Data Officers, Leadership Coaches, and Board of Directors

Given that social distancing measures, if not shelter in place orders, have impacted the entirety of the United States, SWE HQ is offering the following guidance regarding elections, leadership roster updates, and financial reporting.

To support SWE sections through this process, the Leadership Coaching Committee (LCC) will offer office hours. Please reach out to your LCC Coach or email the at lcc-chair@swe.org for support.

Virtual Election Guidance

SWE HQ is advising all SWE professional and collegiate sections to hold virtual elections. Upon review of the bylaws, we confirm virtual elections are acceptable and should be pursued under the current circumstances.

Additional Guidance:

- Ensure your elections are concluded by 6/30/2020; do not delay your elections until the beginning of FY21 (7/1/2020).
- Utilize a free web-based form (Google Forms or Survey Monkey) to prepare, distribute, and collect your ballot.

- Ask for a unique identifier for each voter such as email address or SWE ID.
- Provide at least two weeks for voting, send out multiple emails, and conduct a phone chain if needed to ensure the word gets out.
- Sections should check their section bylaws for the official steps and reach out to their LCC coach with any questions

Update your Leadership & Financial Reports

SWE HQ understands that many sections, especially collegiate sections, may not have physical access to the financial systems needed to conduct year-end analysis and financial support submissions.

Please exhaust these steps in preparing your financial reports:

1. If you are unable to access the physical place where your financial records are being kept, please email your institution's point of contact for this area to determine if an electronic financial statement can be shared.
2. If you have partial records or documentation in an accessible electronic format, please submit an estimated financial report.
3. If you still cannot get access to your institution's records and do not have any accessible electronic records, please re-submit the FY20 report as the FY21 report.

As needed, and as additional documents become available, SWE HQ will work with each Section to update their financial report with an amended version at any point throughout the next year.

To submit your documents, login to the SWE member portal via [swe.org](https://www.swe.org) and click on the **Leadership** button to complete these reports. Instructions on how to navigate and submit these reports through the Leadership Portal can be found on [SWE Support](#).

- **FY21 Leadership Roster Report – Due June 30, 2020**
 - One member in good standing can hold each position
 - **Collegiate Leaders:** Email membership@swe.org with the counselor and/or faculty advisor's first/last name, email address, and ID# to update this information
- **FY20 Financial Report and Conflict of Interest Forms – Due July 31, 2020**
 - One report needs to be submitted for the section
 - Incoming FY21 Presidents and Treasurers must also complete the [Conflict of Interest form](#) (download via link) and upload it during the Financial Report submission process

If you will not be returning as a leader in FY21, the Leadership Position you currently hold has an end date of 06/30/2020. We strongly encourage you to submit these reports as soon as you can so that your section is set for FY21 and you can enjoy your summer. If you are unable to upload the FY21 Leadership Roster before 06/30/2020, **you will need to reach out to SWE HQ** directly to regain access.

Leadership Submissions are Now Available in Your Portal


The SWE Leadership Portal is open and ready to collect your section's FY21 (7/1/2020 - 6/30/2021) Leadership Roster and FY20 (7/1/2019 - 6/30/2020) Financial Report.

Per the **Society Bylaws**, these reports must be submitted annually to SWE Headquarters (HQ) to keep your section in good standing. Sections must be in good standing to receive membership dues rebates and eliminate the risk of being deactivated. Ensure your section remains in good standing and is eligible to receive rebates by completing these forms online by the deadlines listed above.

Get SWE and LCC Support

Please reach out to your LCC Coach or email the at **lcc-chair@swe.org** for support on the above process.

Get SWE Support: If you need any assistance or have questions regarding the submission of these reports, feel free to reach out to **membership@swe.org** or call **312-596-5223** and dial **3 for membership**.



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Society of Women Engineers

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