SPIE Student Chapters prepare students for a successful career in optics and photonics.

Chapter Management Sections

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Intro

If you are reading this, you are likely either in a leadership position at a SPIE Student Chapter currently or interested in getting more involved.

SPIE Student Chapters offer opportunities to build leadership, communication, and outreach education skills. They help you connect with others in the field and define your career path by serving as a platform for organizing people and their ideas.

With over 300 student chapters around the world, you have access to an ever-expanding network of scientists and engineers who can serve as resources, references, and collaborators on projects.

SPIE helps provide the structure and resources for chapters to succeed in preparing students for a successful career in optics and photonics.

After receiving feedback from chapter officers, advisors, and members, we made some changes to our annual reporting process and chapter benefits. Please read through this carefully so that you know what is new in 2020.

This handbook is part of our ongoing efforts to provide better communication tools for the leaders out there who are doing the hard work of recruiting members, coordinating events, creating communities, and changing the world.

Because each chapter is different, we wanted to provide you opportunities to write tips for incoming officers. Please use the workbook sections to ensure that best practices and important processes are communicated.

Meg All
Student Chapter Lead
mega@spie.org
Chapter Management—The Basics

If you are a chapter leader, you already know the answers to these questions. This is a chance to bring everyone up to speed.

What is a SPIE Student Chapter?
A group of at least 10 SPIE Student Members and one faculty advisor who find meaning in organizing activities that prepare students for a successful career in optics and photonics.

How do I know if there is a chapter at my university?
Simple. Check out the map. Each chapter has a webpage where you can learn more.

Why should I join?
It's a big world out there and making connections is going to give you access to more career opportunities. Professional societies like SPIE can help you build your network. Local chapters give you an advantage by offering more opportunities for interactions and sharing ideas.

How do I join?
Easy. You can become an SPIE Student Member online.

How do a lot of us join at once?
If you are involved in a chapter that has more than 10 students wanting to join or renew at once using one payment method, complete the Bulk Membership Renewal Form and send it to students@spie.org.

YOUR TURN
Work with your other officers to write a pitch on why someone should become a member of your SPIE Student Chapter. Think about how this will benefit the individual and how they can contribute to your chapter. The answer is going to be different based on the person you are speaking to. We provided some different types of students to practice on.

• An undergrad student in Engineering who just started his second year.
• A grad student whose research is in optics.
• A PhD student who is in her last year.
Chapter Management—Officers

I Officers are elected leaders who organize activities that bring together the chapter members and report back to SPIE.

How often should we hold elections?
Annually. Every chapter must choose what time of year is the best for this. Many chapters elect new officers at the end of an academic year to start in the new academic year.

What positions should we fill?
The Student Chapter Bylaws go into more detail (see pg x), but at a minimum each chapter must have a President, Vice President, Secretary, and Treasurer.

Are there other positions?
As chapters grow, their officer positions may grow, too. Chapters can elect for other positions based on need. Some examples of other roles that may be useful are a Diversity Officer and a Mentor.

Can someone serve for more than one term?
Per our bylaws, someone may be re-elected to the same position for a second term. No one can serve in the same position for over two years.

How do we update our officer listing?
Each chapter has a webpage. That webpage lists the current chapter members and current officers. To update that information, complete a Officer Update Request Form.

YOUR TURN
When does your chapter hold elections? ____________________________
____________________________________________________________________________________
What positions does it usually include? ____________________________
____________________________________________________________________________________
What are the roles and responsibilities of each of those positions? ____________________________
____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________
Which officer is responsible for scheduling the election? ____________________________
____________________________________________________________________________________
Which officer is responsible for updating SPIE with the election results? ________________
____________________________________________________________________________________
Chapter Management—
Good Standing and Benefits

There are a few things you should know if you are a chapter officer. Benefits and eligibility requirements are high up on the list.

How do we apply for chapter benefits?
Each benefit has specific requirements and application processes, but all benefits require that your chapter be in good standing.

What does “good standing” mean?
To be in good standing, your chapter must meet the following five criteria:
1. Maintain a minimum of 10 current SPIE Student Members
2. Receive support from an SPIE Member serving as the Chapter Faculty Advisor
3. Hold annual elections for President, Vice President, Secretary, and Treasurer
4. Hold a minimum of three chapter meetings per year
5. Submit an annual report by 1 December.

How do we know if we are in good standing?
This is where good chapter record-keeping comes in. But at a minimum, you can check most of the good standing criteria on your chapter’s webpage. This shows your current membership roster, officer roster, and past reports. Hopefully, your advisor is renewing his or her membership each year and your chapter holds at least three meetings annually.

What happens if our chapter falls out of good standing?
Depending on the circumstances, it may be necessary to recruit more members, submit any overdue reports, plan activities, etc. If your chapter has been inactive for over two years, it may risk being decertified. Contact your Chapter Advisor and students@spie.org for tips and additional assistance if your chapter has fallen out of good standing.

What are the annual benefits?
There are three benefits that your chapter can apply for each calendar year. Unused benefits do not roll over to following years. This is why it is best to know them in advance in order to prepare your chapter for success. We will go into detail about each of these in the handbook.

The three annual chapter benefits that every chapter in good standing is eligible to apply for:
1. Activity Grant
2. Officer Travel Grant
3. Visiting Lecturer Grant

YOUR TURN
It’s easier to maintain a chapter when you don’t have to worry about being in good standing.

What measures will your chapter take to ensure that it is always in good standing?
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____________________________________________________________________________
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____________________________________________________________________________
Chapter Management—The Annual Report

Annual reports provide valuable insight into student activities and serve as a resource for future planning. All SPIE Student Chapters are required to report on activities in order to maintain good standing.

When is the annual report due?
Annual reports are due on 1 December for all chapters.

What should be covered in the annual report? Is there a template?
Yes! Please use this Word Doc Template for reporting. Save your finished report as a PDF.

What should be covered in the annual report?
The template covers everything. Here is a snapshot of what to expect:

1. Names of elected officers.
2. List of current chapter members.
3. Details of chapter activities since last report (1 December of the previous year)
4. Total number of attendees/participants in outreach activities conducted by your chapter.
5. Details of planned activities for the next year.
6. Financial Information formatted in a table, including a beginning and ending balance.

When should our chapter begin writing the report?
Officers should work throughout the year to compile the annual report and submit it by the 1 December due date. Many chapters make this a responsibility of the Secretary and Treasurer.

How do I submit the annual report?
On 1 October, the Student Chapter Annual Report and Activity Grant Application will open on SPIE’s application platform SMapply. One chapter officer will need to log in and upload the annual report in a PDF. If the chapter is also seeking activity grant funding, there will be a special section for making that funding request (see page x).

YOUR TURN
Which chapter officer(s) will be responsible for compiling and submitting the Annual Report?
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

How will your chapter officers document events and save photos for the Annual Report?
____________________________________________________________________
____________________________________________________________________

How will your Treasurer track the funding for the chapter so that it is compliant with our reporting requirements?
____________________________________________________________________
____________________________________________________________________
Chapter Management—
The Chapter Activity Grant

SPIE wants to help your chapter stay active. Every year, each chapter in good standing is eligible to apply for up to $1,500 in funding to conduct chapter activities via the Student Chapter Annual Report and Activity Grant Application which is due on 1 December.

This is a competitive grant process wherein chapters must demonstrate a need for the amount requested in the application and the final funding amounts will be decided based on the quality of the report, quality of the funding request, and number of student members affiliated to the chapter. Approved 2020 applications will be paid out in March 2020 via bank transfers.

2020 Chapter Activity Grants should cover funding requests for activities held from 1 April 2020 – 31 March 2021. The requested amount may not exceed $1,500 total. The average funded grant amount is $500 - $900.

There are five types of activities eligible for funding.

- **Management Activities** (up to $500) - This funding is intended to be used for routine activities such as refreshments for holding weekly seminars or hosting a recruitment event.
- **Career Preparation Activities** (up to $500) - This funding is intended to be used for professional development activities such as hosting a workshop on effective resume writing.
- **Industry Connection Activities** (up to $500) - This funding is intended to be used for activities that help chapter members build relationships with those in industry or help chapter members better understand future careers in industry. For example, it could be used to help host an Industrial Visits Day or tour a local company.
- **Outreach Activities** (up to $250) - This funding is intended to be used for activities that support optics outreach in the community or on campus. For example, it could be used to purchase materials for kits for classroom demonstrations or for refreshments for an open lab day activity to attract undergrads to the field.
- **Equity, Diversity, and Inclusion Activities** (up to $250) - This funding is intended to support activities that raise awareness of the importance of inclusiveness in optics and photonics. For example, it could be used to host a panel on gender equity or host a social event to raise awareness of LGBTQ in STEM.

The SPIE Activity Grant cannot be used to fund the following:

- SPIE Student Membership fees
- University lab and/or office equipment
- Honorariums for speakers
- Clothing for the chapter - Please raise funds for t-shirt printing

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**YOUR TURN**

How will your chapter fund events from December - April 2020? __________________________

____________________________________________________________________________

____________________________________________________________________________

Which chapter officer is responsible for making the 2020 Activity Grant request? _________

____________________________________________________________________________

____________________________________________________________________________

In a separate document, work with your chapter to determine what activities you want to hold from 1 April 2020 – 31 March 2021 and document what the funding needs are of each?

- Which of these activities may qualify for funding under the SPIE 2020 Chapter Activity Grant?
- Do your funding needs exceed the maximum for any category? If so, how might you receive other sources of funding for some of these activities?
- Prioritize which of these activities are most important to the health of your chapter.
Chapter Benefits – The Officer Travel Grant

SPIE strives to provide chapter officers with conference exposure and career development opportunities. Each year, chapters may elect one representative to apply for the Officer Travel Grant to attend a SPIE Career Development Summit held at one of our meetings. Below is a timeline for the 2020 Summit Travel Grants:

- SPIE Photonics West (31 January – 6 February, San Francisco, California United States)
  - 1 September 2019 – Summit applications open.
  - 10 October 2019 – Summit applications close.
  - 15 November 2019 – Summit applicants are notified of status.

- SPIE Photonics Europe (28 March – 2 April, Strasbourg, France)
  - 15 November 2019 – Summit applications open.
  - 3 January 2020 – Summit applications close.
  - 30 January 2020 – Summit applicants are notified of status.

- SPIE Optics + Photonics (22 – 27 August, San Diego, California, United States)
  - 31 January 2020 – Summit applications open.
  - 13 March 2020 – Summit applications close.
  - 17 April 2020 – Summit applicants are notified of status.

Officer Travel Grants include a registration to the Career Development Summit, a student attendee registration for the SPIE meeting, and reimbursement for travel expenses. The funding portion of the grant is determined by region of your chapter and the region of the meeting. Reference the Reimbursement Schedule on page x.

New in 2020—Officer Travel Grants may not be shared with other chapter members. However, if there is someone from your chapter who would like to attend as a volunteer, he or she may apply under our new Volunteer Travel Grant. Please note that Volunteer Travel Grants are very competitive and not guaranteed. We recommend chapters conducting a similar election process for a representative for the Volunteer Travel Grant if there is interest in that.

See graph below to understand the differences between the grants.

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### Career Dev. Summit Travel Grant

<table>
<thead>
<tr>
<th>Officer (OTG)</th>
<th>Volunteer (VTG)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Eligibility Requirements</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Membership</strong></td>
<td>SPIE Student Chapter Member</td>
</tr>
<tr>
<td><strong>Engagement</strong></td>
<td>Must be involved in student chapter leadership.</td>
</tr>
<tr>
<td><strong>History</strong></td>
<td>Not a previous recipient of the OTG. Must have been selected by the chapter to serve as representative.</td>
</tr>
<tr>
<td><strong>Frequency</strong></td>
<td>One per chapter per calendar year.</td>
</tr>
<tr>
<td><strong>Recommendation</strong></td>
<td>Requires advisor recommendation.</td>
</tr>
<tr>
<td><strong>Conditions</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Participation</strong></td>
<td>Must participate in Leadership Workshop, Chapter Management Workshop, and present a poster at the Student Chapter Poster Session and attend at least one other professional development workshop during the week.</td>
</tr>
<tr>
<td><strong>Benefits</strong></td>
<td></td>
</tr>
<tr>
<td>Registration to Summit (valued at $100)</td>
<td>Included</td>
</tr>
<tr>
<td>Technical Registration (valued at $400 for students and $700 for ECPS)</td>
<td>Included</td>
</tr>
</tbody>
</table>
| Reimbursement* for travel expenses. | Up to $2,000 based on region Expenses eligible for reimbursement include:
  * Airfare and ground transportation – To and from the conference (varies based on location)
  * Lodging – For up to six nights. (valued at up to $1,000)
  * Meals – $50 daily per diem for up to seven days | Up to $1,000 based on region Expenses eligible for reimbursement include:
  * Airfare and ground transportation – To and from the conference (varies based on location)
  * Lodging – For up to three nights. (valued at up to $500)
  * Meals – $50 daily per diem for up to three days |

*Reimbursements are to be made by bank transfer (either via ACH or bank wire) shortly after the meeting. In order to receive reimbursement for travel expenses including airfare, ground transportation, and lodging, you must present your Reimbursement Form with proper proof (itinerary, lodging bill) and completed bank transfer information at the registration table before the Leadership Summit begins and meet the participation requirements detailed above.
### Reimbursement Region Schedule

For a list of countries in each region, view the list [here](#).

![World Map with Regions]

<table>
<thead>
<tr>
<th>OTG – Max $2k</th>
<th>Traveling to Photonics West or Optics + Photonics (California – all years)</th>
<th>Traveling to Photonics Europe (France - even years)</th>
<th>Traveling to OPIC (Japan - odd years)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Traveling From</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Region 1</td>
<td>$1,000</td>
<td>$1,500</td>
<td>$2,000</td>
</tr>
<tr>
<td>Region 2</td>
<td>$1,500</td>
<td>$1,500</td>
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<tr>
<td>Region 3</td>
<td>$1,500</td>
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</tr>
<tr>
<td>Region 4</td>
<td>$2,000</td>
<td>$1,500</td>
<td>$1,500</td>
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<tr>
<td>Region 5</td>
<td>$2,000</td>
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<tr>
<td>Region 6</td>
<td>$2,000</td>
<td>$2,000</td>
<td>$1,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Volunteer – Max 1K</th>
<th>Traveling to Photonics West or Optics + Photonics (California – all years)</th>
<th>Traveling to Photonics Europe (France - even years)</th>
<th>Traveling to OPIC (Japan - odd years)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Traveling From</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Region 1</td>
<td>$500</td>
<td>$800</td>
<td>$1,000</td>
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<tr>
<td>Region 2</td>
<td>$800</td>
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<td>Region 3</td>
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<td>Region 4</td>
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<tr>
<td>Region 5</td>
<td>$1,000</td>
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<td>$500</td>
</tr>
<tr>
<td>Region 6</td>
<td>$1,000</td>
<td>$1,000</td>
<td>$500</td>
</tr>
</tbody>
</table>

### YOUR TURN

How will your chapter elect a representative for the Officer Travel Grant and Volunteer Travel Grant (if applicable)?

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

How will the Officer Travel Grant recipient from your chapter report on what he or she learns?

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________
Chapter Benefits –
The Visiting Lecturer Grant

A primary benefit of SPIE Membership is the opportunity to interact with world-class scientists and engineers at the leading edge of technological advances in optics and photonics. Each SPIE Student Chapter in good standing can request travel support for one lecturer per calendar year using the Visiting Lecturer Grant.

The Visiting Lecturer Application must be submitted at least three weeks prior to the planned event.

Follow the detailed steps on our website to organize a lecture at your university. Note that the funding is made via reimbursement directly to the lecturer.

View speakers in our Visiting Lecture Directory to start planning who you would like to invite for a visit.

YOUR TURN

How will your chapter select the Visiting Lecturer for invitation in 2020?

__________________________________________________________________________

__________________________________________________________________________

Which officer will be responsible for sending the invitation and communicating with the lecturer?

__________________________________________________________________________

__________________________________________________________________________

How could this benefit be used to help prepare chapter members for their future careers?

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________
It is normal for chapter commitment to fluctuate over time. Graduation, thesis writing, or other obligations can all impact the ability of the chapter to function and benefit its members. Here are some tips to help energize your members:

- Organize activities that require the involvement of many chapter members. Science fairs, volunteer teaching, and public outreach are excellent ways to utilize the abilities of your chapter members.
- Set up an informal table in the department building with SPIE promotional materials, handouts, and membership applications at the beginning of the school year. Talk to your members and plan events early.
- Share chapter responsibilities.
- Use a website or social media page to keep members informed and in communication about events and projects.
- Showcase your events on SPIE’s social channels using the SPIE Students Social Media Post Request Form.
- Get inspiration from other student leaders. Send members to the Student Chapter Leadership Workshop.
- Create a binder or electronic version of instructions for future officers including expectations of officer roles, protocols for chapter benefits, annual calendar events, etc.

YOUR TURN

What activities will your chapter participate in to recruit new members?

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

How does your chapter keep members engaged and invested?

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________

What tools will your chapter use in succession planning to train incoming chapter officers?

____________________________________________________________________________

____________________________________________________________________________

____________________________________________________________________________
Join the community
Photonics career discussion, opportunities, and networking.

SPIE CAREER LAB EDITORIAL BOARD
Katie  Petra  Alexander
Matthew  Elizabeth  Debasmita

www.facebook.com/groups/SPIECareerLab

SPIE. SPIE is the international society for optics and photonics.