

YOUNG MEMBERS GUIDE

GET MORE FROM VOLUNTEERING

Institution of
**MECHANICAL
ENGINEERS**

ABOUT THIS GUIDE

This document has been designed so that it can be updated regularly. The latest edition is always available on the IMechE website at www.imeche.org/vrc/ymb as a PDF file, and all the Young Member Panel Chairs will be informed each time a page is changed so that it can be downloaded.

The guide has been divided into five sections for ease of reference and each section deals with a different area of the Young Member Panel's work and activities. It is not an exhaustive guide and the IMechE welcomes any suggestions on how to improve the information contained within it.

DISCLAIMER

The data and information supplied within this guide are for information purposes only. Neither the IMechE nor the Young Members Board (YMB) shall be liable for any errors or delay in updating the content of the guide.

Any specific enquiries regarding Young Member activities should be referenced against the current issue of "Guidelines and Rules for the IMechE Network, Part A: Regions or Part B: International (Overseas)" (depending on the geographical location of the panel). This is available at www.imeche.org/VRC/Governance

All other enquiries should be referred to Hazel Morgan at Institution of Mechanical Engineers

Tel: +44 (0)20 7973 1252 Email: youngmembers@imeche.org

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SECTION 1: STRUCTURE AND BACKGROUND

The Institution of Mechanical Engineers (IMechE) has over 100,000 members of which approximately 65,000 are classed as Young Members.

The definition of a Young Member is 'Any Affiliate, Associate and any member up to ten years after achieving professional registration'.

Regional Network

The Institution conducts local activities through a network of volunteer committees run by IMechE members.

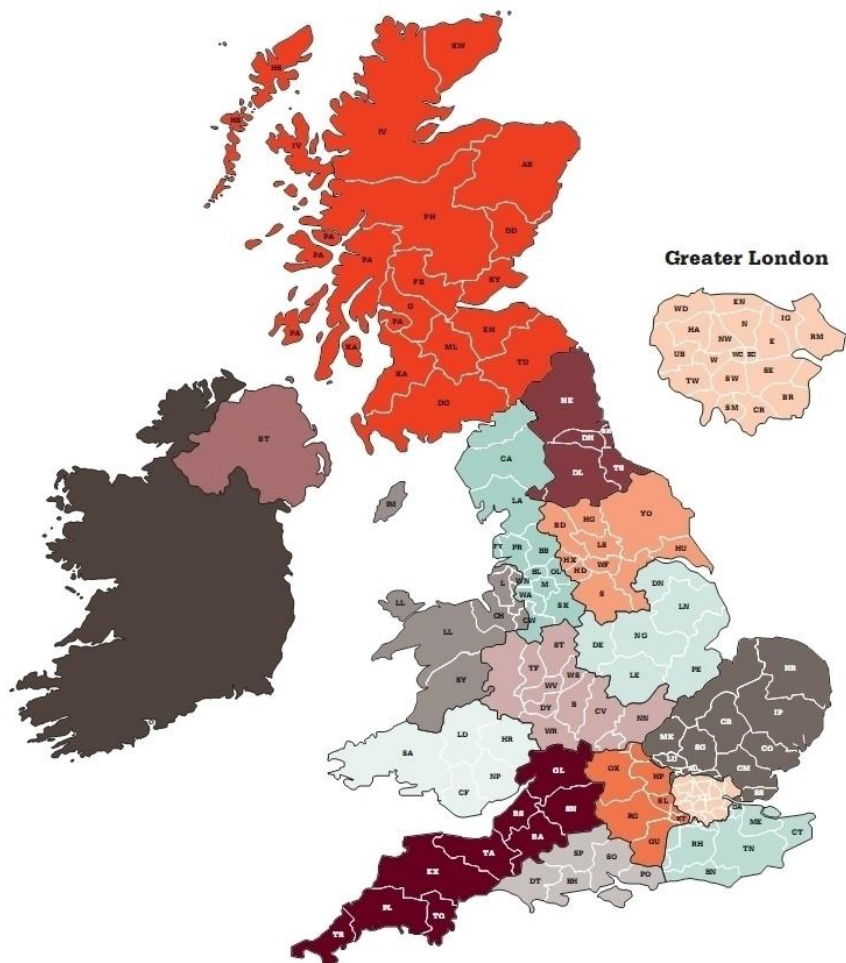
UK

16 Regions broken down into:

52 Areas

30 Young Member Panels

UK NETWORK



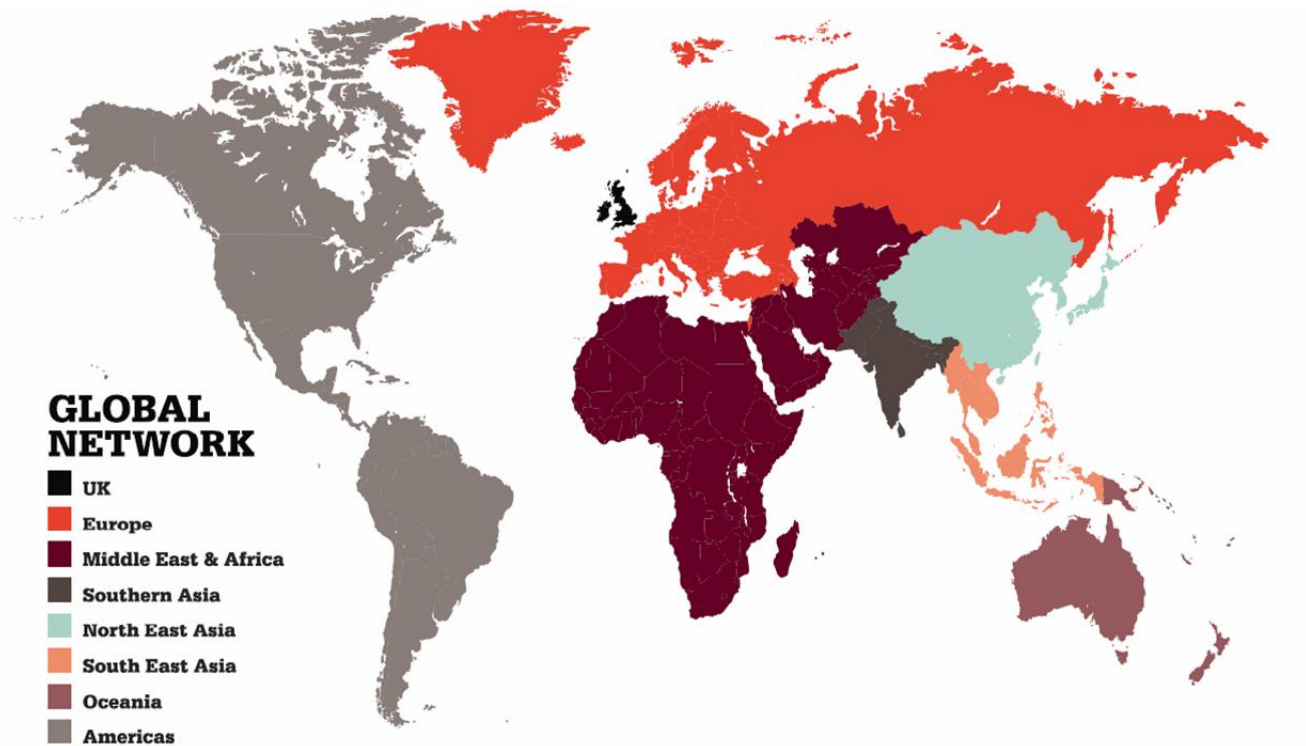
International

7 regions

16 branches and groups

8 joint groups

And over 100 country representatives



There is also a network of Divisional centres around the UK who organise industry specific events these are:

- Automotive
- Process
- Power
- Railway



Did you know?

You can download both these maps from the website?
www.imeche.org/vrc/NetworkInfo

Useful links

Main Institution pages

<http://nearyou.imeche.org/near-you/UK>

<http://www.facebook.com/imeche>

<http://www.linkedin.com/groups?gid=2265081>

<https://twitter.com/IMechE>

Young Member Board pages

<http://www.facebook.com/#!/groups/22468381701/>

<http://www.linkedin.com/groups/IMechE-Young-Members-Board-3954136>

https://twitter.com/IMechE_YMB

1.1 WHAT IS THE YOUNG MEMBERS BOARD?

- The IMechE's national Board dedicated to the needs of Young Members
- Made up of representatives (reps) from the 16 UK Regions, seven International Representatives, eight Divisions and 10 Groups plus elected officers (Chair, Deputy Chair, two Vice Chairs, and a Trustee Board representative).
- Reports directly to the Trustee Board
- Supported by staff in the Member Engagement team

What does the YMB do?

- Represents Young Members across the IMechE network.
- Acts a conduit for Young Member views to the Trustee Board and Council, and vice versa.
- Supports IMechE's member recruitment and professional development activities.
- Liaises with Young Member groups in other engineering organisations.
- Holds three meetings a year plus an annual planning weekend each summer.
- Looks at short and long term strategy (See Appendix 9)

How can the YMB help you?

- By being the official voice for Young Member interests and concerns and ensuring that we are represented on matters affecting us.
- By providing support and guidance on organising/managing local Young Member activities
- By providing opportunities for Young Members to continue their professional development.



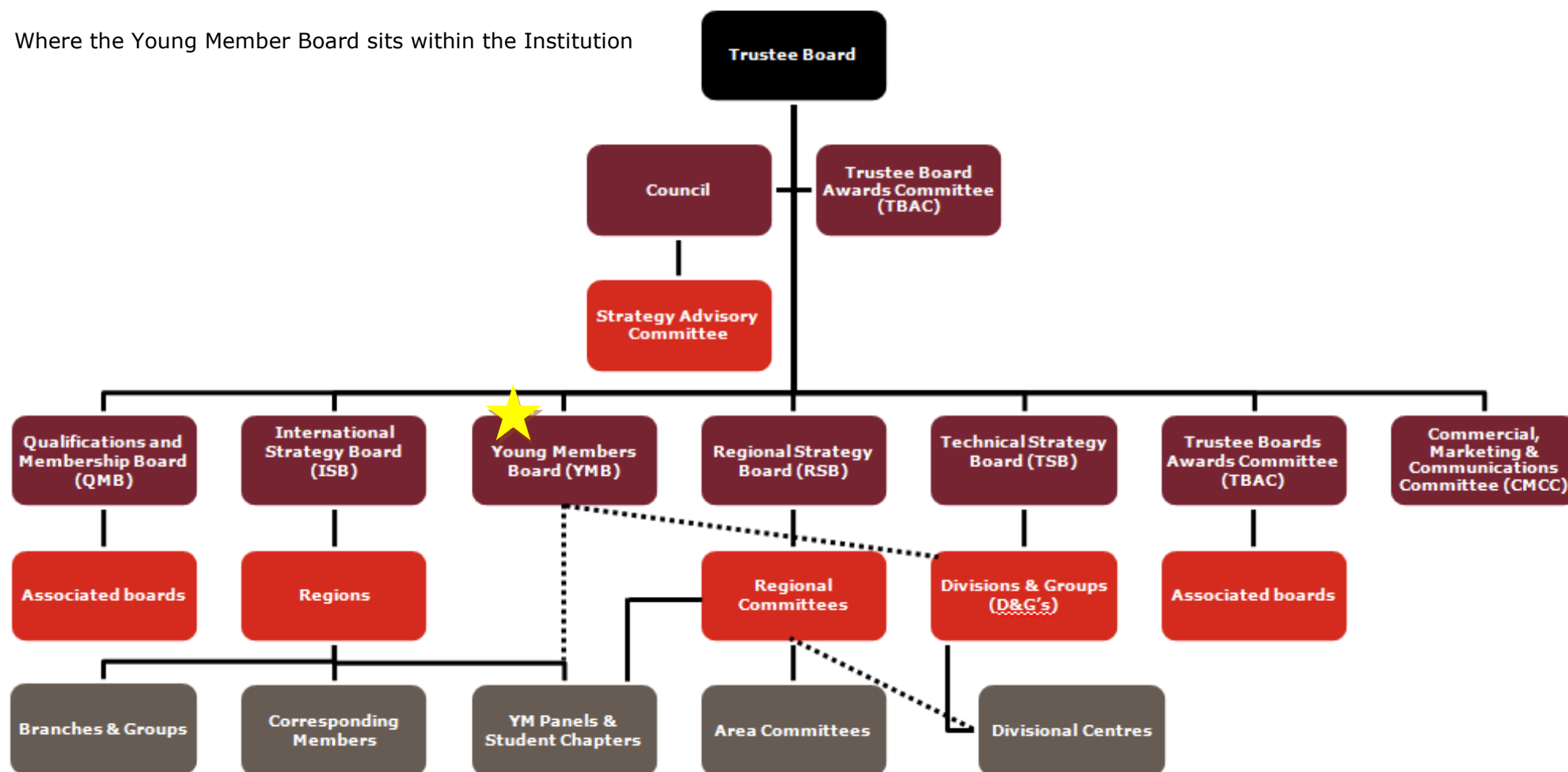
Who is your rep?

Your rep will be listed here www.imeche.org/ymb/board-reps and if not ask HQ! Maybe you could become the rep and represent your region?



The YMB meeting
at Formula
Student 2011

Where the Young Member Board sits within the Institution



YMB Regional/Divisional Representative

A regional representative sits on the Regional Committee and represents Young Member interests at meetings.

A divisional representative sits on their relevant divisional board and represents member interests at meetings.

The main role of the YMB representative is to act as a conduit for the exchange of information between the YMB and the Young Member panels in the region they represent.

The role means contributing to the national work of the Young Members and therefore YMB reps will be required to take on actions on behalf of the YMB.

1.2 FIND OUT MORE ABOUT THE YMB

The website www.imeche.org/youngmembersboard has some more information about who is on the board and how to get in touch with them.

1.3 WHY ARE YOU A YOUNG MEMBER VOLUNTEER?

Have you ever stopped and asked yourself why you became involved with the Institution and the Young Member network? Most people will naturally assume that you and other members of the committee are insane! After all, why spend a chunk of your valuable time working on the behalf of others for no financial reward? IMechE members get involved with the Young Member network because:

- You care about the profession and the people that work within it.
- You care about the image of professional engineers and promote the role at every opportunity.
- You want to ensure that through work with schools and community based projects, the profession is seen to be attractive and accessible.
- You want to ensure that young engineers across the UK and overseas are well served by a comprehensive programme of events, lectures and visits.
- You want to work with Universities to raise the profile of the Institution with undergraduates and academic staff and encourage participation wherever possible.
- You want to be part of the Institution and influence its policy and direction.
- You want to have fun, meet new people, make new friends and progress to Professional Accreditation.

SECTION 2: GUIDELINES FOR YOUNG MEMBER PANELS

INTRODUCTION

This chapter will provide information that will help you set up and run your Young Member Panel. The structure of a typical Panel is explained and the duty of each committee member is outlined. This chapter attempts to go further than merely listing these duties by offering practical advice on how to get things done.

The types of meetings and events which your Panel may be involved with are discussed and information about what resources are available to you is highlighted.

The quotation of rules within the text has been omitted as far as possible, but where necessary rules and guidelines are paraphrased and cross-references are made to the appropriate documents.¹

¹ Throughout this chapter references are made to the Guideline and Rules for the IMechE Network Part A: Regions or Part B: Branches, hereafter, known as the Rules.

2.1 THE PANEL SETUP

The activities and business of each Young Member Panel are controlled by a committee which comprises of up to twelve members.

The organisation of a typical committee is shown in the Figure 1 but in practice it is unusual for every position on a committee to be filled. However in very large committees sub-committees can be formed and these report back to the main committee. These can consist of educational themed committees, event planners and Greenpower.

Members may have to take on more than one role depending on the Panel's current or planned activities.

As a minimum the Committee should have a Chair, Honorary Secretary and Honorary Treasurer.

Depending on the Panel's activities, other office positions may be considered e.g. Website Officer, Newsletter officer etc.

When setting up a new Young Member Panel there are a number of key issues that need to be considered. Information on these issues can be found at Appendix 1.

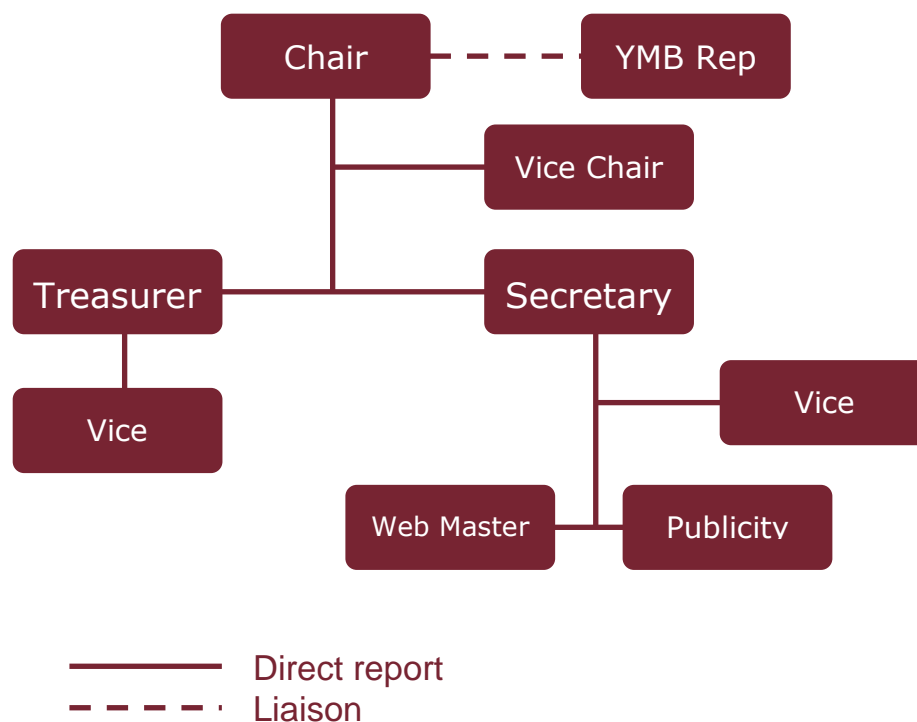


Figure 1 - Panel organisation chart

Main Roles on the Committee

Whilst it would be impossible to outline in detail *all* the activities members of a committee should undertake, the following descriptions should highlight some of the core aspects for each of the main roles.

2.1.1 Chair

The Chair is responsible for the activities of the Young Member Panel, and is ultimately accountable to the Trustee Board of the Institution for its actions. A full guide to the Chair's responsibilities can be found here:

<http://www.imeche.org/vrc/Role-Descriptions/Chairs>

As a figurehead and spokesperson for the Young Member Panel, he/she is responsible for leading and motivating the Committee to ensure it meets its objectives.

At the start of each year, the Chair is responsible for formulating a business plan in consultation with the Committee, outlining what the Panel will achieve over the next 12 months.

A good business plan serves a number of functions. It will help when requesting funds and resources from the Region / D&G Committee and help to motivate the Committee. The Chair should establish and maintain good links with the Region / Branch committee (whichever is appropriate) by attending their Committee meetings and keeping them updated on Young Member Panel activities. This activity could be delegated to other members of the Committee.



SMART Objectives

In order to give your committee the best chance of achieving your objectives they need to be:

Specific, Measurable, Achievable, Realistic and Time-bound

It is positively encouraged to have two way communication between the Young Member panels and their senior counterparts. This could be Young Member panel representatives attending senior panels committee meetings or vice versa. (This helps share the extra time burden of attending meetings, and shows other panels how young member panels work, which is often different to their counterparts)

The Chair is responsible for liaising with the Honorary Secretary in order to formulate agendas for meetings and will chair committee meetings.

At lectures and events organised by the Committee, the Chair will act as the host for the guest speaker by introducing and thanking them on behalf of the Panel. This activity can be delegated to other members of the Committee (e.g. the event organiser)





Delegation, Delegation, Delegation

Whilst the Chair plays a key role within any Young Member Panel, it is important that they do not attempt to do everything. Delegation is one of the key responsibilities for any Chair. Whilst being practical, it also inspires a sense of responsibility and loyalty towards the Panel from its members.

2.1.2 Honorary Secretary

The Honorary Secretary is responsible for dealing with all incoming and outgoing correspondence. All correspondence should be in line with the Institutions brand guidelines. The Chair should be informed of any relevant correspondence.

Organising and facilitating committee meetings. This involves:

- Arranging the venue
- Preparing agendas in consultation with the Chair (see example in Appendix 2)
- Informing committee members of meetings by email or Facebook event
- Taking the minutes of meetings (see example in Appendix 3)
- Distributing the minutes to committee members after approval from the Chair. Copies should also be sent to the Region / Branch Honorary Secretary
- Publicising events (unless undertaken by the Publicity Officer) using the IMechE Near You website, email list servers e.g. Yahoo Groups, direct mailing, posters etc.

For more advice on communicating with your members see
www.imeche.org/VolunteerResourceCentre/communicating



Speak out for Engineering!

The formal communication comes from the Secretary but everyone on the panel is responsible for publicising events in their workplace, amongst their friends and family.

- Responsible for working with the Chair to prepare an Annual Report on the progress of the Young Member Panel for the year ending 31st December. An example can be found in Appendix G of the Rules and copies should be sent to the Region / Branch Honorary Secretary and the Young Member Secretary.

2.1.3 Honorary Treasurer

Every Young Member Panel is allocated funding from its Regional Committee, who in turn receives money from IMechE HQ in order to undertake activities. The Honorary Treasurer is responsible for controlling these funds. Specific details can be found in Section 4 of this guide.

The Institution is a registered Charity therefore expenditure of funds is governed by the Charities Act and IMechE By-Laws. Guidelines can be found in Section 6 of the Rules.



The treasurer is responsible for managing the accounts (paying expenses and depositing income) and keeping track of expenditure and revenue to ensure that the Committee does not exceed the grant allocated by their Region / Branch. Each year the Honorary Treasurer prepares an estimate of proposed expenditure for the next year, as well as compiling the annual accounts for the previous year.

Appendix H of the Rules illustrates the timeline for the accounting and budgeting process.

Optional Roles

Vice Chair, Assistant Secretary & Assistant Treasurer

It may be useful to fill these positions if you have committee members who are keen to become more involved with the Panel. As well as sharing the workload with office bearers, this is a good opportunity for individuals to learn the job so that if the main office bearer leaves the Committee, a replacement is readily available.

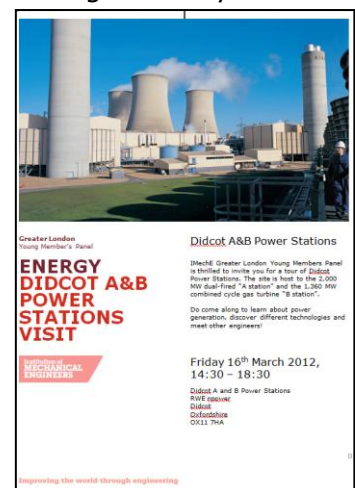
Publicity Officer

This person is usually responsible for publicising events and lectures organised by the Panel. There are a number of effective ways of doing this, for example using the IMechE Near You website, List Server email, social media updates and local radio/newspapers.

It is important to keep in touch with HQ, notably the Member Engagement and the Marketing Department. They can provide advice and guidance in publicising events as well as providing guidelines on the IMechE corporate image.

The Officer is also responsible for maintaining and updating the Young Member Panel's web space on the IMechE Near You website, Social Media pages (Facebook, Twitter etc.) as directed by the Committee. For technical help on getting online talk to Kevin Manning by emailing regions@imeche.org For more advice:

www.imeche.org/VolunteerResourceCentre/communicating



2.1.4 YMB Sleeping Representative

The YMB Sleeping Representative would exist on those Panels on which the current regional YMB representative does not sit. The hope is that having a YMB link on all Panels will encourage greater interaction between the regional YMB representative and Young Member Panels.

The representative will:

- Ensure the Panel is up to date on YMB current business.
- Ensure that the YMB is made aware of any Panel views or issues.
- Act as a substitute for the Regional Representative at YMB meetings when necessary
- Communicate closely with the YMB representative to carry out functions above.

Educational Co-ordinator

If you are in an area with a particularly active STEM (Science Technology, Engineering and Maths) centre, you may find yourselves being asked to volunteer at a large number of events, in addition to running your own events such as the IMechE "Our World in 2050", "SET for Sport" or "Engineering your Future". An educational co-ordinator can act as a liaison between the STEM Centre, volunteers and local area or region panels. They act as a point of contact for teachers or companies looking to sponsor events.

For more information on STEM see STEMNET who can give all IMechE members a free criminal bureau records check.

The other educational initiatives the IMechE are working on include: Primary Engineer, Bloodhound SSC, Imagineering and the Smallpeice Trust. For more information go to www.imeche.org/ambassador



A SET for sport event in a London school run by the London panel



2.2 SUCCESSION PLANNING

Firstly, don't let the title put you off; it is just about making sure that you have planned the committee for the forthcoming year with enough time to make things happen. This is essential to ensure that the committee functions effectively from one year to the next.

Electing Officers into additional positions such as Assistant Honorary Secretary / Treasurer and Website Officer can also assist with succession planning, as those already involved in the Panel in some capacity are usually more willing to take on one of the main roles (Chair, Honorary Secretary and Honorary Treasurer) at a later stage.



The personal touch

Talk to people and explain the benefits of taking on one of the roles on the committee. Don't leave it to the day of the AGM so that nobody feels pressured into taking a role they don't want.

If your Panel is just starting or growing after a period of inactivity this is an area that you need to pay particular attention to. Work hard to encourage the ordinary members in the area to get involved, they may feel afraid of standing for a committee post, it is your task to show them that it is not as daunting a task as it first seems! It is using the skills you use in your everyday careers but for a different purpose.

Remember, you can always ask Head Office for help!

2.3 TYPES OF MEETINGS AND EVENTS

There are various different types of meetings which panels organise:

Committee meetings

Where only committee members are present and event programmes and finances are organised and discussed. Committee meetings should have an agenda and any agreed actions should be minuted.

Frequency of committee meetings is up to the committee – some meet every month whilst others choose to hold more substantial meetings every three months and address ad hoc business via email.

Lectures

These are events open to IMechE members and non members and usually members of the public. They are often about new advances in engineering or exciting applications for existing technology.

Here is a lecture by the Inverness panel on formula 1.



Visits

These can be comparatively local or distant, although day trips are much easier to organise. Trips might include visits to manufacturing plants or to see particular products e.g. a record beating car. (See James Bates Grant P28)

Social

Social activities are important both for members of the committee and for all young engineers in the area as they provide networking opportunities. They can be purely social e.g. bowling, or have an engineering slant such as go-karting or visiting a vineyard bottling facility!

AGM

This is the one meeting that must take place every year and which is an opportunity to review the past year's activities. It is open to all members and is normally where the election of new committee members takes place. It should be held around April of each year in line with the Institution's Time-line for Regional Election Process (Appendix E in The Rules).



Double up

Try to hold the AGM as part of a social event i.e. hold the AGM 15 minutes before 2 hours of go-karting

SECTION 3: RESOURCES

As a Young Member there are various sources available to provide help and advice. More details on each section can be found in the next few sections:



Get in touch

The staff at HQ have a wealth of knowledge, give them a call, they are here to help you!

3.1 HQ RESOURCES

The Member Engagement team

The team are responsible for the development, co-ordination and delivery of the Institution's International, UK and Young Member operational plans to deliver the Institution's strategy. They are a fantastic resource available to the young members. Details of the members and responsibilities are below.

Kevin Manning

Near You queries and access
Volunteer Resource Centre website
List server and mass mailings
IMechE network email addresses

K_manning@imeche.org or call on +44(0)20 973 1303



Hazel Morgan

The young member board and strategy
Ambassador scheme
Volunteer training conference
Primary Engineer/Smallpeice relationships

H_morgan@imeche.org or call +44 (0)20 7973 1252



Michelle Cummings

UK Regions
Regional Strategy Board
Equality and Diversity Steering group

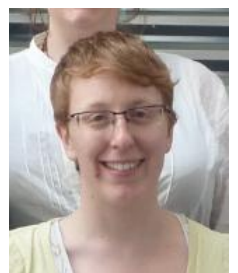
M_cummings@imeche.org or call +44 (0) 207 973 1259

Marketing

Michelle Wheeler

Marketing Copy
Template and Brand advice for events

M_wheeler@imeche.org or call +44 (0) 207 973 1254



International

Rachel Leech

International membership development

international@imeche.org or call +44 (0) 207 973 1313



top tips...

Keep HQ updated

When a new post is filled on your committee let HQ know straight away so records can be kept up to date. This means you won't miss valuable updates

3.2 BUSINESS DEVELOPMENT MANAGERS

The nine Business Development Managers are the primary representatives of the Institution when it comes to recruiting members. They take a leading role in business development, to provide support to achieve professional engineer status, promotion of the Institution and the profession. Details of these Business Development Managers are available on the IMechE website.

Business development managers are available to visit your area to provide advice, in 1:1 or lecture session on how to achieve EngTech, IEng, CEng or Fellowship status.

www.imeche.org/membership/professional-registration/companies-universities-trainers/companies/support-and-resources/business-development-support

top tips...

Make best use of your time

Templates for posters are available on the Volunteer Resource Centre, just add the details.

www.imeche.org/vrc/templates

3.3 MARKETING DEPARTMENT

The Marketing Department can advise on media relations and public affairs issues. They can also advise on the use of the IMechE logo and the production of literature so that it complies with the IMechE corporate image.

The department can also give advice on how to forge links with local MPs and lobbying Government. They can advise in the production and distribution of press releases. Email media@imeche.org with any questions.

A useful resource for ensuring that your documentation and presentations are in line with the Imeche brand identity is the "Our Brand Identity" section of the website providing guidance and documentation for support. This can be found at www.imeche.org/brandidentity

You can also order generic banners to be loaned to you for events. See www.imeche.org/vrc/usefulforms and see B for banners

For further details contact the Marketing Department by email at marketing@imeche.org.

3.4 LOCAL RESOURCES

Region / Branch Officers

It is important to establish and maintain good links with your senior committee. They will have a lot of valuable experience in working on behalf of the Institution and can provide contacts, guidance etc

For further details email regions@imeche.org It is also important to remember that you have a lot of skills in areas that may be of use to them, such as in website design, using digital media or knowledge of new technology.

Industrial Liaison Officers (ILOs)

The primary role of ILOs is to promote the IMechE and its activities within industry. This includes promoting professional registration and supporting events organised by local IMechE committees. ILOs can be a useful marketing tool when organising an event as they can publicise the event within their company.

For further details visit www.imeche.org/training-and-professional-development/volunteering/volunteer-roles/industry-liaison email ilo@imeche.org or call Helen Kozlowski on +44 (0)207 973 6970

Academic Liaison Officers (ALOs)

The primary role of ALOs is to promote the IMechE and its activities within universities. This includes promoting professional registration and supporting events organised by local IMechE committees. ALOs can be a useful marketing tool when organising an event and may be able to help with possible event venues within their University.

Email Helen Kozlowski at alo@imeche.org or telephone + 44 (0)207 304 6970

3.5 OTHER INSTITUTIONS

Many Young Member Panels work closely with other institutions which has many advantages such as:

- Organising joint events such as lectures and social events
- Sharing ideas on promoting local engineering
- Excellent source of networking
- Sharing resources / costs.



Network

Build your links with other Institutions; they can be a very valuable resource! We even have a joint event Institution templates with ICE and IET
www.imeche.org/vrc/templates

3.6 UNIVERSITY ENGINEERING SOCIETIES

Working with Engineering Societies is an ideal way of improving links in universities and getting students involved with your Panel.

Contact can either be made through the Academic liaison officer, or alternatively the Student Union should have contact details.

3.7 STEMNET

STEMNET (Science Technology Engineering Mathematics) is a government sponsored initiative to ensure that there is a flow of well motivated, high quality people from schools who have an interest in, and an understanding of, engineering related subjects.

To help this there are focus areas throughout the UK which operate as a focus for teachers, business and industry to obtain information about resources, schemes and initiatives concerned with science, engineering, technology and mathematics.

Remember to tell STEMNET when you are going to event as you will be covered by their insurance!

<http://www.stemnet.org.uk/>

3.8 HQ PUBLICITY RESOURCES

3.8.1 Near you website

Near You is essential to the activities of a volunteer group. It offers specific, custom made online areas for a volunteer group to display their activities, contact details, news and events listings.

These areas are vital in communicating with the membership. With the right level of content and consistent updates Near You can become a member's first port of call when looking for Institution interaction.

Near You is where people view your events online. It is the place members in your area will look first to find out more about what is going on in their area. By making sure details of your events are up to date you'll be able to ensure that everyone looking at your site is fully informed on events, lectures, professional development workshops and the various other activities coordinated in your locale.

Near You can be used, in conjunction with the Ambassador vacancy page, to advertise vacancies on your committee. It can also be used to detail your objectives and strategies, to highlight past events or key outputs or simply to promote the benefits of active volunteer membership.



Get Involved!

Make your committee welcoming and accessible to new members by having a get involved page on Near You. This will help with succession.

3.8.2 Volunteer email addresses

IMechE network email accounts allow volunteers to send and receive emails via an IMechE affiliated address, in this case: volunteerrole@imechenetwork.org

Access to a specific IMechE email account and mailbox allows a volunteer to keep track of Institution correspondence and have a safe and identifiable IMechE address to contact members in their locality.

IMechE network email works in the same way as any other email account, the user logs on with a username (their email address) and password from which they can access an array of functions to create, view, send, store and manage their email communications.

Contact regions@imeche.org to find out more about IMechE email.

Using the IMechE email address clearly identifies you as an IMechE recognised contact, ensuring those people you contact are fully aware of your credentials.

IMechE email accounts have been set up for Chairs, Secretaries and Treasurers of Young Member Panels/Sections.

Each email address has been set up to ensure that when an individual steps down from a post, the email account can be transferred to their replacement simply and with minimal disruption to anyone using the contact address.

Any active member can request an email address if it is needed for their position, it is not limited to the above roles.

You must NOT use this email address to send blanket emails to large numbers of email addresses. This can result in 'imechenetwork' being temporarily blacklisted from a number of email systems – mainly gmail, aol and hotmail. Contact regions@imeche.org to learn more about this.

3.9 USEFUL GUIDES

Affiliate Member Guide

This guide was produced for all undergraduates and those who have an interest in, or who are engaged in, mechanical engineering and/or related activities. It contains information about Young Member activities, finding a job and Formula Student among other things.

For copies of the Affiliate guide email: marketing@imeche.org

Associate Member Guide

This guide was produced for graduates and provides useful information about working towards professional registration, Young Member activities, contact details etc.

For copies of the Associate Member guide please email: marketing@imeche.org

Political Lobbying Activities

An ideal way of promoting engineering in your local area is by forming a relationship with your local MP. This simple guide provides tips on how to do this, explaining how to make the initial approach and maintaining the relationship once established.

For a list of tips please email: media@imeche.org or see www.imeche.org/vrc/toolkits

Working with the Media

Forming a good working relationship with local media can prove to be very valuable when promoting events and the profession. To assist in developing media relations a simple one-page guide on how to produce an effective press release is available. There is advice on our templates on the VRC www.imeche.org/toolkits

For further information email: media@imeche.org

HQ Events List

The IMechE organises technical conferences, seminars, workshops and social functions for the Mechanical Engineering community. Designed by engineers for engineers, it lists all of the events organised from IMechE Headquarters in London.

For more information please visit <http://events.imeche.org>

3.10 WEB LINKS

IMechE Website

The IMechE website is updated daily to provide comprehensive information regarding the profession and membership of the Institution.

www.imeche.org

Volunteer Resource Centre

This area has been created to store all kinds of resources that will help you in your role, including access to support tools, toolkits, tips, best practice, useful contacts and other information.

www.imeche.org/vrc

IMechE Young Members Board

This area of the website is devoted to issues that interest and affect students and Young Members. This area also includes downloadable resources for Young Member Panels and individuals as well as hosting the latest issue of this Young Member guide.

www.imeche.org/about-us/governance/young-members-board/

IMechE Near You

This area of the website is devoted to the activities of the Regional and International network including Young Member Panel activities.

<http://nearyou.imeche.org/near-you>

Graduate Engineer

This is a website aimed at bringing together engineering students from all disciplines. The site provides an opportunity to exchange information, provide information on further education options and outlines the range of opportunities open to engineering graduates.

www.graduateengineer.com

Developing Engineers

The developing engineers blog is written by young engineers for engineers. The content is topical, based on the interests and experiences of our bloggers. Discussion and comment are always welcome, as are new contributors.

www.developingengineers.com

Your account

Update email preferences, your contact details, your diversity details and order merchandise

www.imeche.org/myaccount

SECTION 4: FINANCIAL RESOURCES

4.1 THE HONORARY TREASURER

Regions / Branches allocate each of their Young Member Panels funding each year. The Honorary Treasurer is responsible for keeping proper and sufficient account of the revenue and expenditure of the Young Member Panel as appropriate, keeping accounts and liaising with the IMechE Finance Department.

The Region / Branch Honorary Treasurer allocates a sum to each part of the substructure that will enable the various activities to take place. This allocation is usually done in accordance with an estimate of the proposed expenditure by the Young Member Panel.

4.2 FINANCIAL RECORDS

The Institution uses a common financial recording system, Kalamazoo cash sheets or Excel spread sheets, for all Regions / Branches and Divisions. A template for these cash sheets is available from the Finance Department and no other system may be used. For guidance on compiling and maintaining financial records either contact your Region / Branch Honorary Treasurer or the IMechE Finance Department on tel +44 (0)1727 896062.

It is essential that all transactions are recorded and invoices/receipts in the name of the IMechE are obtained for all money spent. All records must be kept up to date.

VAT invoices paid should be in the name of the IMechE, eg IMechE South Eastern Region Young Member Panel. Invoices should not be made out to individuals. Copies must be enclosed with cash sheets and sent to Kingston Smith who administer the Institution's finances.

4.3 SOURCE OF FUNDS

Regional Allocation

The Trustee Board shall determine the amount of grant it will provide to each Regional Committee, who in turn allocate funding to their Young Member Panels. Young Member Panels must not commit to expenditure that would require funding in excess of the credit granted by their Regional Committee.

Young Member Panel Honorary Treasurers are required to submit such an estimate to their Region's Honorary Treasurer by 31st March of the year prior to coverage. This is in line with the Timetable set out in Appendix H of The Rules



Big events

If you are planning a big panel visit or event, the James Bates grant could provide up to 50% of the funding.

www.imeche.org/about-us/governance/young-members-board/YoungMemberGrant

James Bates Grant

The James Bates Grant is an IMechE trust fund allocated to the YMB. Any applications from Young Member Panels to the fund are considered and approved by the YMB Executive.

Grants may be made to promote mechanical engineering and the professional development of young members of the Institution. All grants must be made in line with the general strategy set by the Trustee Board.

The grant will cover 50% of the costs incurred as a result of a technical meeting and/or industrial visit arranged by a Young Member Panel. This is a reimbursable fund which means that the Young Member Panel must initially cover any costs before being reimbursed from the Fund. The grants are available up to the value of £6000.

For further details contact the prizesandawards@imeche.org

Sponsorship

Young Member Panels can also source local sponsorship. Although there are no formal procedures for obtaining sponsorship, any monies must be used to cover event costs rather than to create a surplus. There are VAT and accounting issues which need to be adhered to and the IMechE Finance Department should be contacted to explain how to deal with these issues.

For details contact the Member engagement department on 020 7973 1252

4.4 RECEIPT OF MONEY

If a cash or cheque payment has been received, an official receipt should be issued and copies of these should be attached to the financial returns to verify the entry. For example, if organising an annual dinner or booking a coach for an industrial visit, receipts should be issued to those who pay for the tickets for the coach costs. For guidance, please contact the IMechE Finance Department.

4.5 EXPENSES

Inevitably you will be asked to reimburse members of the Committee for out-of-pocket expenses incurred in the course of their duties.

Travel expenses are payable to Committee members attending Committee meetings only if the journey exceeds 15 miles for an individual meeting.

If using public transport then the fare can be reclaimed. If using private cars, there is a maximum mileage allowance which may be claimed. This is set by the Trustee Board and current figures are available from the Regional & International Operations Department.

Where possible, members should arrange to share transport and Members travelling by car are encouraged to claim only the actual cost of petrol rather than the mileage allowance, to ensure effective use of funds.

Members claiming expenses should submit all applicable receipts with their claim, which must be retained for audit purposes.

4.6 OTHER PAYMENTS

Please note that Institution funds may only be spent to further the objectives of the Institution. If in doubt always check with the IMechE Finance Department, however, the following payments are specifically excluded:

- Paying members for services rendered
- Gifts to members (unless branded with IMechE logo)
- Donations to other charities
- Excessive purchases of alcohol and meals.

4.7 METHODS OF BANKING

Some Regions / Branches issue a cheque book to each Honorary Treasurer of the substructure. Others operate on a single account and pay all bills submitted by the substructure. Check with your Region / Branch Honorary Treasurer to establish the system in your area.

If the Region permits separate books then a bank account will need to be opened. It should be in the name of 'The IMechE -----Region / Branch Young Member Panel' or an appropriate name if there is more than one Young Member Panel in a Region. Bank statements should be obtained on a monthly basis and a copy sent with the cash sheets to the Finance Department at HQ.

The Institution is a registered Charity and as a result most banks will offer reduced charges or free banking. The charity number (206882) should appear on cheques and other official documents.

Please note that the Trustee Board has stipulated that a senior member of IMechE HQ Finance staff must be included on the bank mandate, but there is no requirement to send cheques to Head Office for signature. Mandate documentation should be sent to the Finance Department at HQ so that the signatory's details can be added.

4.8 CHEQUES

The Honorary Treasurer or Honorary Secretary is authorised to receive and give receipts for monies receivable by the Committee and to make payments on behalf of the Committee when acting under their instructions.

Cheques for over £200 shall be signed by two members of the Committee from a list previously authorised by the Committee for that purpose. The list shall include the Institution's Head of Finance. No cheque is to be signed by a signatory if it is payable to themselves.

For amounts of less than £200, one member from the authorised list may sign cheques.

Major transactions of £500 and above must be organised and minuted by the Committee.

The cheque book should remain in the possession of the Honorary Treasurer.

4.9 ANNUAL FINANCIAL RETURN

Every year all Young Member Panels must submit a detailed estimate of their proposed expenditure for the year beginning 1st January to their Region / Branch Honorary Treasurer or Honorary Secretary, so as to arrive no later than 31st March (or as advised by the Region / Branch Committee).

4.10 CAPITAL EXPENDITURE AND EQUIPMENT

Capital equipment must not be purchased from revenue or other Young Member Panel funds. Such items must be requested via the Regional & International Operations department with a case supporting the request. Prior warning is required and Treasurers should file requests at least by mid-year for implementation in the following year, if approved. The Institution will then depreciate capital against these items in future Institution annual accounts.

A return of all capital equipment held should be made annually as at 31st December to the IMechE Finance Department.

For more detailed information refer to the Financial Guidelines.

4.11 ORGANISING OF EVENTS

The estimated income and expenditure for all events should appear on the Revenue Budget Request form (example in Appendix 5) so that it is allowed for in the Panel's approved Grant.

All budgeted events must be assigned an event number by the Panel. The event number must be used to identify income and expenditure to that event on cashbook sheets returned to the Finance Department throughout the year. Place the event number against the right hand side of the description column. An event summary sheet for each event must be returned to the Finance Department attached to the relevant cashbook sheet when:

The first income/expenditure transaction takes place for the event showing the event number and whether the expenditure is related to an income generating activity.

All transactions for the event have been completed. The event summary sheet should show the total income received (if any), total expenditure and net income/expenditure for the event.

The summaries are required to ensure the correct VAT treatment of event income and expenditure.

Events may only be organised if they are within the scope of the Institution's Royal Charter. They may be free of charge or on a fee charging basis – obviously the greater the amount of revenue that can be generated, the more events and activities a Young Member Panel can organise.



You could survey members using Survey Monkey, a free online service. For an example of how a panel used it see www.imeche.org/vrc/event-toolkits

SECTION 5: LIFE AFTER YOUNG MEMBERS

The Institution of Mechanical Engineers is a member-based organisation, run by its members for the benefit of its members. The charitable status bestowed upon the Institution ensures any additional sources of revenue that are generated are immediately fed back into the organisation to support its future growth and strategies.

As members of the Institution, you will be responsible for this growth, strategy and future policy for many years to come. Your input, endeavour and enthusiasm as a Young Member has been warmly welcomed. However, it is vital that this commitment is harnessed and secured as your career progresses.

There is life after Young Members, there is a role for you to undertake and you will have a positive impact in whatever you choose to do.

Your Young Member Panel has been running in tandem with Region / Branch and Area committees, and once your term of office is complete you will often find an invitation to join a senior committee. Think of the huge contribution that you can bring to the Region / Branch – energy, direction and profile all can be attributed to you. This is your opportunity to continue to make a difference at Region / Branch level. We acknowledge that demands on your time and career will be tight, but you have already proven through your Young Member involvement that a few hours a week is all it takes.

Work within the Institution should also continue – the Board, Division or Committee that you serve will want you to continue in the role. You are the future of the Institution. Refreshingly, young industrialists are actively engaged with the work of the IMechE – ensure this trend continues; your involvement will continue to shape the Institution and cement the foundations for future growth.



Leading the way

Young members are leading the Institution. We are making a difference, influencing policy and improving the status of Engineering in everyday life. Keep this momentum going as you progress through your career.

If you have any questions about the guide please email regions@imeche.org

APPENDIX 1 – STARTING UP A YOUNG MEMBER PANEL

CASE STUDY: NEW PANEL

The West Cumbria Young Members Panel was set up in 2009 by 4 young members (YMs) that previously attended the meetings of the West Cumbria Area Panel. Whilst the area panel was successful the YMs felt a new committee could best serve their interests and provide a greater opportunity for socialising. It took approximately 6 months of informal discussion before the first official YM meeting was held.

The founding members had experience of attending IMechE meetings which helped in the format of the meetings. I would advise anyone looking to set up a new committee to try and visit other committees.

Making Contacts

The biggest problem at the start was contacting young members. The founding members worked for three different companies which meant they had access to different contacts.

In addition to using personal contacts, the IMechE list server proved to be the best way to contact new members.



It's who you know

Use your contacts to organise events on your speciality. It may feel like another day at work to you but other members will be fascinated.

VENUE

Cumbria is a large geographical area and transport can be difficult with poor road links and minimal public transport. At first we tried to move the location of the meetings, but we found that the same people were turning up regardless and thus we decided to hold the meeting central to the attendees. The venue used for meetings is a locally owned pub, in a town centre, with free parking available nearby, reasonably priced drinks, and decent food. The pub has an upstairs and this is where we have our meetings, we do not pay for the venue, simply for the food and drink. Whilst there can be other people nearby we have not found this to be a problem and can help us spread the word of the committee existence. The bar staff knows who we are, so if there are new people looking for us, they will direct them to our table.

SOCIALISING

Nearly all of the committee have moved into the area after graduation with minimal family support in the area. Whilst the biggest employer in the area has a graduate scheme, not all of the companies do, making it hard to make new contacts. The committee tries to provide a welcoming environment where people can find like minded friends and support.

A big advantage of holding meetings in the pub is the ability to stay and socialise for a drink or two afterwards. Location (and having to drive) means that usually 50% of the group are drinking alcohol and 50% are on non alcoholic drinks but this hasn't hindered the socialising and has resulted in people sharing lifts-encouraging more socialising. We also have socials after technical visits which can be for food or drink out or a BBQ at someone house.

The socialising aspect has helped us develop the type of events that we run. We organise several large education based events a year, that can require a lot of preparation, the friendships that exist within the committee have undoubtedly helped with honest communication and the committee's willingness to help out.

Learning the roles

Whilst some members had attended other meetings, it was in attending the IMechE Volunteer Conference that we really understand our roles, what we were required to do for finance and record keeping purposes etc. The IMechE has developed the volunteer resource centre www.imeche.org/vrc which has lots of useful information, activity and visit ideas.

Professional Registration

In the last two years we have had two CEng applications and five IEng applications. Those returning from interview have been able to give invaluable honest feedback on the interview process to the rest of the committee. The links between the YMs and area committee enable us to contact available mentors and interviewers that are willing to mentor and hold mock interviews for the candidates, which is invaluable where there are not company schemes in place. This is an invaluable benefit of the committee for members who are unsure about how to go about obtaining IEng or CEng status. In advertising these services through the link server, we have also recruited new committee members.

It should be acknowledged that some individuals will join the committee in order to meet competencies for the accreditation. It is important the committee are honest with each other, in order to understand what everyone wants to get from the committee so that suitable roles can be identified for individuals.



It's good to talk

Other panels have already been through this so speak to your regional YMB representative. They can put you in touch with panels all over the world.

Events

The area committee had a procedure for setting up their events and they were all organised and publicised 6 months in advance. Consequently, we were forced to work around their schedule to minimise duplicate events, or events being held too close together.



Positively, we were able to hold more ad hoc events. The YMs have focused on visits to local companies with technical talks during the visit. Whilst the numbers have been small (10), this has often made it easier for companies to accept us.

It is important to work with Divisions and Groups, Regional and other local committees to understand their schedules and planned events to

minimise any clashes. It is worth noting that other committees may have contacts in companies where you want to hold a visit.

Pictured above the West Cumbria 'Girls in engineering event'.

Succession Planning

The demographic of the YMs mean that there could be apprentices, university year in industry students, graduates on placements and employees attending your meetings. Some members will be transient and their attendance may be more virtual, via email rather than at meetings. It is important to consider being flexible, role sharing where possible and understanding of work and other personal commitments.

APPENDIX 2 – EXAMPLE AGENDA FOR COMMITTEE MEETINGS

<Insert Location>

<Insert time and date>

- | | | |
|----|--|----------------------|
| 1 | Introduction | Chair |
| 2 | Apologies for absence. | Hon. Secretary |
| 3 | Minutes of last meeting. <i>- Any action which wasn't completed at the last meeting should be discussed here, unless already covered on the agenda. - If the draft minutes of the last meeting are OK then they are finally approved here.</i> | Chair |
| 4 | Treasurer's Report <i>- This is a brief statement of the current financial situation, and a comparison of actual spend against budget.</i> | Hon. Treasurer |
| 5 | Correspondence <i>- Any correspondence received or sent since the last meeting to be brought to the Committee's attention</i> | Hon. Secretary |
| 6 | Publicity <i>- Update on use of website, social networking and event coverage</i> | Publicity Officer |
| 7 | Agenda item 1 <i>For example - School visit</i> | AN Other |
| 8 | Agenda item 2 <i>For example - Business plan update</i> | AN Other |
| 9 | AOB | All |
| 10 | Date and venue of next meeting | Hon. Sec |

APPENDIX 3 - EXAMPLE MEETING MINUTES

(Thanks to the South Yorkshire Young Member Panel)

Yorkshire Region
South Yorkshire Young Members Panel
Meeting Agenda

**The Francis Newton, Clarkehouse Road
Sheffield, S10 2LA**

**7th February 2012
6.30pm**

COMMITTEE

Chairman
Vice-Chairman
Secretary [Web Officer]
Vice-Secretary
**Treasurer [Education
Officer, Yorkshire YMB
Rep]**
Past Chairman
Sheffield University Rep
SHU Rep
Media Officer
Site Visit Officer
Committee Members

Gavin Poyntz [GP]
Ching Sheng Lai [CSL]
Tom Garwood [TG]
David Jackson [DJ]

Chris Harrop [CH]

Rob Thornton [RT]
Dave Hayden [DH]
Carolyn Webb [CW]
Prince Okpala [PO]
Raybin Yu [RY]
Anna Hunt [AH]

ATTENDANCE

Present

Tom Garwood
Gavin Poyntz
Dave Hayden
Rob Thornton
Chris Harrop
Carolyn Webb

Apologies

Ching Sheng Lai
David Jackson
Prince Okpala
Anna Hunt
Raybin Yu

| Item No. | Subject | Details | Actions |
|----------|---|--|---------|
| 1 | Agenda To agree the agenda and consider suggestions for any other business that has arisen since circulation of the agenda. | EWB joint events | TG |
| 2 | Minutes of Previous Meeting | Agreed by those present, no comments received prior to meeting. | ALL |
| 3 | Events Programme 3.1 INSTITUTION/PRESIDENTIAL DINNER 2012 | The president is visiting ITM, AMRC, NAMRC and JRI on 15 th March followed by evening meal @ Cutler's | |

| | | | |
|--|--|---|--|
| | <p>Current ticket sales etc.</p> <p>3.2 THE "GREAT" POPULATION DEBATE</p> <p>LATEST NEWS AND PROGRESS FROM TG, RT & GP</p> <p>Confirmed panellists</p> <p>Dates</p> <p>3.3 SKILLS WORKSHOPS [AH]</p> <p>Planned for May Approx £100 Venue: Showroom? Resources required</p> <p>3.4 GLOBAL MANUFACTURING FESTIVAL</p> <p>Update on organisation. CH</p> <p>3.5 SITE VISITS</p> <p>News from Raybin</p> <p>3.6 NETWORKING LECTURE</p> | <p>Hall.</p> <p>Our committee is not having a specific separate table so those who wish to go need to book their own tickets ASAP. There may be space on the university tables.</p> <p>Currently approx 180 people are attending.</p> <p>Consensus reached in favour of having a representative from populationmatters.org attending however a decent chair is needed to moderate the debate.</p> <p>EESG to be approached for possible chairman.</p> <p>Live streaming/recording is possible.</p> <p>Current confirmed panellists as follows;</p> <ul style="list-style-type: none"> • Kevin Anderson - Confirmed • Andy Sheppard - Confirmed • Representative from populationmatters.org - Tentative • Engineering Economist - To investigate <p>Current dates are 1st/8th March or postpone to last week of April.</p> <p>Holding my event in May. Budget – room hire and refreshments. AH waiting for the Showroom to get back re: availability, cost of hire & refreshment costs etc. Expecting it to be around £100. We should provide drinks vouchers so people get their first drink free</p> | <p>All/DH/CW</p> <p>All</p> <p>GP</p> <p>RT</p> <p>RT GP TG GP</p> <p>RT/GP/TG</p> <p>AH</p> <p>CH</p> <p>RY</p> <p>DH</p> |
|--|--|---|--|

| | | | |
|--|---|--|-------------------------------|
| | | <p>(similar to the intro meeting that RT ran a while back.)</p> <p>Still some organisation to do re: format since the event can't be run as a typical 'speed dating' event. We want all the engineers to meet each other, not just the opposite sex. Any ideas on how to do this will be appreciated.</p> <p>Need the list of companies in South Yorkshire that employ young engineers.</p> | |
| | <p>3.7 OTHER EVENTS IDEAS</p> <p>To hear and discuss ideas for other events from Panel members and, where possible allocate responsibility for organising them.</p> <p>ALL EVENTS APPEAR ON DROPBOX SPREADSHEET – PLEASE KEEP EVENTS UP TO DATE IF YOU ARE RESPONSIBLE FOR THEM</p> | <p>Risk assessments done, just need to send to Steve W – This week hopefully</p> <p>No further news</p> <p>Main speaker has agreed on Tuesday 1st May 2012. 6pm arrival for a 6:30 start, till 8:30pm. Going to leave room booking for a while, can't decide between a University venue, or somewhere else like the showroom.</p> <p>Current idea is book one of the rooms at the Showroom or University Arms and to lure people in on to premises. 1) Offer a free drink, so max 50 people ~max £150 2a) If they're students: Networking tuition followed by a chance to put this into practise with real people (Internship and Job opportunities). Also we should have some pretty well known (In student circles any) speakers coming along. 2b) Non students: Get various working Engineers and Engineering recruitment</p> | <p>RT</p> <p>GP</p> <p>TG</p> |

| | | | |
|---|---|---|-------|
| | | <p>type people to come along (They can choose to miss the lecture session if they like!)</p> <p>As they'll benefit from getting to socialise with all the lovely undergrads, maybe make some contacts for applications.</p> <p>Approx £150 + £20-30 (Room booking might be free) required.</p> <p>Tribology Lecture – RT or Rob Dwyer Joyce to give talk potentially</p> <p>Mock mediation session for industry tailored towards engineering.</p> <p>Working with EWB on some events. It may help us to appear more practical to potential members.</p> | |
| 4 | <p>Finance Update [CH]</p> <p>To receive an update from the Treasurer about the SYYP budget.</p> | <p>We still do not have a certain budget allocation. The region as a whole have received notification from HQ as to what the region (and we're) getting, but it was so much lower apparently than requested that it is in the process of being challenged with HQ. Hopefully we should hear soon.</p> | CH |
| 5 | <p>Young Member's Board [RT,CH]</p> <p>To hear (more) from the YYMB Rep about any updates.</p> | <p>In the process of contacting the regional YM chairs to get some sort of two-way feedback system in place for better communications in the future.</p> <p>YMB keen to see a joint meeting between YM chairs taking place to increase links</p> | RT/CH |

| | | | |
|----|---|---|---|
| | | <p>between areas.</p> <p>YMB focusing on international membership. Particularly China and India. From our end this can be done using an Affiliate to Associate get registered event prior to losing international students to their original countries.</p> | |
| 6 | <p>SY Area Committee</p> <p>Any news out of area meetings that affect us?</p> | <p>As part of the area annual lecture series the next one is titled "Sound Sense". It may be of strong interest to students. Posters to be displayed at TUoS and SHU. (23rd Feb)</p> <p>The royal aeronautical society may be keen to share lectures with the area creating a more diverse and delegated lecture programme in South Yorkshire.</p> | <p>DH/CW</p> <p>GP</p> |
| 7 | <p>Committee Planning</p> <p>Any further planning in need of consideration at this time?</p> | <p>Calendar requires updating with confirmed events.</p> <p>AGM needs advertising. Committee needs to finalise positions up for grabs.</p> | <p>TG</p> <p>TG/All</p> |
| 8 | <p>University Updates</p> <p>General discussion led by chair</p> | <p>Reps to sell dinner tickets.</p> <p>Contact Denis Healy regarding Affiliate to Associate get registered at end of year.</p> <p>IMechE notice board being organised for SHU.</p> <p>Reps to try and find replacements/advertise role if unable to stand for positions following AGM.</p> <p>Aksel may be interested at TUoS.</p> | <p>DH/CW</p> <p>RT</p> <p>CW</p> <p>CW/DH</p> <p>DH</p> |
| 11 | <p>Young Member Survey</p> <p>Results so far</p> | <p>Approx 33 responses so far. Need to re-issue link to get a few more if possible – more responses = better data.</p> <p>Current snapshot; Most</p> | <p>TG/DH/CW</p> |

| | | | |
|----|--|--|-----|
| | | <p>responders...</p> <ol style="list-style-type: none"> 1. Are students, work in academia or manufacturing 2. Are affiliate/associate although a large number are either not a member or are unsure of membership level. 3. Preferred the idea of professional development, technical lectures and skills workshops although education events and networking were also highly rated. 4. Have not attended an IMechE event in the last 12 months 5. Are not an active volunteer with the IMechE 6. Do want to be actively involved in the IMechE 7. Did not know about the young member committee although it was only a 55/45% split 8. Are not involved in any other STEM organisations. 9. Did not know any young member is eligible to join the committee. 10. Use Facebook & LinkedIn of which we have a presence. | |
| 13 | Approaching Local Companies General discussion by committee. | This requires a re-assessment of our goals for this item as it has been on minutes for a while with no real progress. | All |
| 14 | Other Business | 10 th July – Teen Tech Event AGM - April | All |
| 15 | Date of Next Meeting (Please inform TG if you are attending or not) | 6 th MARCH 2012 | |

DISTRIBUTION LIST

| SY Young Members | Position | Email Address |
|-------------------------|------------------------------|---|
| All members | All positions | twitter.com/IMechE_SYYM facebook.com/IMechESYYM http://nearyou.imeche.org/uk/york/RUYO/ |
| SY Area panel | | |
| Steve Wainwright | Chairman | emailaddress |
| Regional Area | | |
| Nicky Baxter | Admin Officer | YorksAdmin@imechenetwork.org |
| Andy Hamilton | Regional Chairman | YorksChair@imechenetwork.org |
| Denis Healy | Business Development Manager | d_healy@imeche.org |
| IMechE HQ | | regions@imeche.org |

APPENDIX 4 - EVENT REQUIREMENTS FORM

IMechE Aberdeen Young Member Panel
Proposed Event - Requirements Form

| | | | |
|--|--|---|--------------|
| Part 1 - Event Details | | | |
| Title: | The LR5 Submersible | | |
| Date: | Wednesday 24th October 2011 | | |
| Location: | Aberdeen | Venue: | RGU room MA7 |
| Time: | 630pm | Written confirmation? | Yes |
| Part 2 - IMechE Requirements | | | |
| Format: | Technical Presentation / Lecture with question & answer session afterwards. | | |
| Duration: | Presentation: Approx. 1hr Q&A session: Approx. 30 mins | | |
| Target Audience: | The event is being organised for IMechE members living in the Aberdeen area. The audience will comprise mainly of young (i.e. under 30) professional mechanical engineers working in the area, and undergraduate engineering students. The event may also be advertised to senior IMechE members and members of other professional institutions. | | |
| Expected Numbers | | 50-100 | |
| Subject Matter: | Basis - Article in IMechE Professional Engineering 13/12/11 Topics: History of the LR5 Design Features and Performance Characteristics of the LR5 Operational Experience | | |
| IMechE Contact: | David Christie | 01779 483036 | |
| Part 3 - Speaker Requirements | | | |
| Speaker(s): | Name | Job Title | Company |
| | Ben Sharples | LR5 Project Engineer | Rumic |
| | Tom Heron | LR5 Pilot | Rumic |
| Contact Details: | 0141 885 1996 | | |
| Audio / Visual Equipment: | | Data projector, screen <input type="checkbox"/> | |
| Other display aids: | | Flip chart + pens. <input type="checkbox"/> | |
| Other requirements: | | <input type="checkbox"/> | |
| Part 4 - Any other comments by Speaker on IMechE requirements | | | |
| <i>E.g. OK to answer questions, any questions / clarification required on above.</i> | | | |
| <input type="checkbox"/> | | | |

APPENDIX 5 – EVENTS FEEDBACK FORM

This form is available online at

http://www.imeche.org/Libraries/Volunteer_Resources/Event_Feedback_Template.sflb.ashx

[REGION/BRANCH/AREA/PANEL/YM]

EVENT FEEDBACK 20__

We would appreciate it if you could complete the questionnaire below and hand it to any committee member on leaving. The information that you give will be treated in confidence and used to try and improve the service we offer to members of the Institution. Thank you!

Event _____ Date _____ Time _____

Venue _____

1) Are you a member of the Institution of Mechanical Engineers? ☐ YES / ☐ NO

2a) Are you a member of any other professional engineering body? ☐ YES / ☐ NO

2b) If YES - which one? _____

3) How did you find out about this event? *Posters / Email / PE / Other*
If other please explain _____

4a) Are you on the [INSERT NAME] local news mailing list? ☐ YES / ☐ NO

4b) If NO - would you like to be on this email list? ☐ YES / ☐ NO

If YES - please provide your email address IN CLEAR BLOCK CAPITALS _____

5a) Would you be willing to act as a contact for your place of work for posters and other information about the Institution? ☐ YES / ☐ NO

5b) Would you be interested in helping out on your local committee? ☐ YES / ☐ NO

5c) Can you offer a presentation or a visit?

If YES to 5a, b or c please write your contact details below.

☐ YES / ☐ NO

If YES ☐ YM / ☐ Senior

20__ Programme

6a) How many other Institution of Mechanical Engineers events have you attended this year?

0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9-10 ☐ 11-12 ☐ 13-14 ☐ 15-16 ☐ 17-18 ☐ 19-20 ☐

6b) How would you rate this event on a scale of 1 to 10 (1 is poor/waste of time, 10 is very interesting).

Poor 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ Good

Contact details / ideas for future events / comments:-

THANK YOU FOR YOUR RESPONSE!

APPENDIX 6 – EVENT PLANNING

PREPARATION AND INITIAL PLANNING

Decide on who is to be your targeted audience – students / Young Members / members / general public.

Organise a small project – plan early and plan thoroughly. (Consider a planning sheet as in Appendix 4).

Use Region / Branch contacts and the Regional Managers, look what other panels are doing on the IMechE Near You website, have a brainstorming exercise at your next panel meeting,

Don't let one person do all the work. Many hands make light work. Be a team.

Work with other Institutions - share the work and share the costs.

Try to avoid public holidays, school holiday periods, major sporting events etc.

DETERMINE NEEDS OF ATTENDEES

What does your Panel aim to achieve by running the event?

Many engineers are now much more cross-disciplinary so successful events should aim to cross the boundaries of mechanical/electrical/social/environmental etc. as appropriate.

Appraise previous events. What were the best bits, what worked well, what needed to be improved?

Choose a subject that will attract an audience – different Regions / Branches will have different interests.

CHOOSE A SPEAKER AND VENUE

Is the speaker accustomed to public presentations?

Choose a speaker who is enthusiastic about their subject but does not speak 'over your head'

Try to have good transportation links, centrally located to targeted audience, good car parking facilities

Determine a time that will be most suitable. If people have to travel, give them time to get there after finishing work.

Facilities – availability / capacity / access / seating / OHP & PC connection / catering.

DETERMINE BUDGET

Speaker expenses / travel / accommodation.

Venue expenses (many Universities will provide lecture rooms free of charge)

Advertising and marketing expenses.

Refreshments.

Income from delegates / sponsorship / adverts.

Thank you gift for speaker e.g. book, voucher or IMechE merchandise.

MARKET YOUR EVENTS

The more you promote your events, the greater the potential audience.

Send details of your events to the Young Member Secretary so they can be entered into the diary section of *agenda* (Note: this needs to be done at least two months before event – deadline publishing dates are available from the Young Member Secretary).

List events on the IMechE Near You website.

Once you have built up your audience contact database, send out update emails.

Produce posters and send to ALOs, ILOs, your Region / Branch committee and your Regional Manager.

Produce a press release and distribute to local media. Templates and advice for doing this can be found on the VRC or by emailing media@imeche.org

Facebook events – see Bath and Bristol YM fan page

FINAL ARRANGEMENTS

Send confirmation of meeting time / location / event schedule / maps to venue / accommodation details to speaker (if required).

Send schedule and maps to delegates.

Arrive early and check facilities, put up direction posters to room, meet speaker at arranged time and location and check refreshments.

Prepare an introduction speech and include fire/safety instructions.

Have the committee on hand (wearing identification badges) to meet and talk to delegates – promote your panel!

Prepare a couple of questions as an ice breaker.

AFTER THE EVENT

Thank speaker and present gift (must be IMechE branded if bought with IMechE budget)

Market some of your future events to the audience.

Produce a register – obtain audience contact details. Register template available on VRC. www.imeche.org/vrc/usefulforms under E.

Write a thank you letter to speaker / organisation.

Pay any bills promptly.

Debrief at next Panel meeting – develop strengths and learn from mistakes.

Panel Chair to report successes to the senior Committee.

APPENDIX 7 – BUDGET FORMS

Budgeting is an essential part of running a Young Members Panel. The IMechE funds the activities of the regional and area panels through grants which are requested by the regional treasurer.

Determining budgets for panel activities will help to set your agenda for the year, allow you to focus on the activities that will bring the most benefit to the members and makes it possible for the institution to plan ahead financially. Controlling spends ensures that the obligations set down in your yearly plan can be met and tracks the accuracy of your budgets for predictions in future years. Guidance on the financial obligations of an area panel can be found at http://www.imeche.org/Libraries/Volunteer_Resources/UK_Financial_Guidelines.sflb.ashx.

Your Regional Honorary Treasurer will be able to provide guidance on how to create and submit budget requests and prepare the required documentation. Examples of this are shown on the following two pages.

APPENDIX 8 – BUSINESS PLAN

MISSION STATEMENT

The mission statement should concisely state what the panel hope to achieve.

SUMMARY

How the panel expect to achieve the objectives

STRATEGIC OBJECTIVES

Objectives which are important in the planning and direction of the whole operation.

TACTICAL OBJECTS

Objectives which are important to improve the panel.

SYNOPSIS

This section should include a brief overview of the past year in particular information about how the objectives set the previous year were achieved. The table should be included outlining the events and the number of attendees.

| Event | Number of Attendees |
|-------|---------------------|
| | |
| | |

COMMITTEE MEMBERS AND POSITIONS

The committee positions, which the committee have selected, should be stated with the person's name, telephone number and email address. Three positions that always must be held are the Chairman, Secretary and Treasurer.

| Position | Committee Member | Contact Telephone | Email |
|-------------------|------------------|-------------------|-------|
| Chairman | | | |
| Secretary | | | |
| Treasurer | | | |
| QSJ Organiser | | | |
| Publicity Officer | | | |
| Web Officer | | | |
| YMB Rep | | | |

PROMOTION OF ENGINEERING

Details should outline how the young member panel expect to promote engineering within their Region.

COMMUNICATION

Details of how the panel hopes to improve engineers' communication skills in their region through their events.

RECRUIT AND RETAIN

Outline details of how the panel hope to retain their current members and how the panel are planning to recruit new members over the following year in relation to their events.

SUPPORT

Outline detail of how you will support the members' in improving their life skills and supporting the regional network and Committee members.

PROGRAM OF EVENTS

Each event should be outlined in detail with further information about the event being made available as details are confirmed.

| Date | Time | Event | Location | Organiser | Cost | Details |
|------|------|-------|----------|-----------|------|---------|
| | | | | | | |
| | | | | | | |

FINANCE

The table below should be completed including the event, cost and where the money was obtained for the event.

| Event | Cost | Who paid for event |
|-------|------|--------------------|
| | | |
| | | |

APPENDIX 9 – CENTRAL STRATEGY

Please note this appendix will be updated annually.

Did you know the young Member's board devises a strategy for young members based on the strategy devised by the Trustee board? See below for the most recent strategy of the Institution and the YMB.

We hope your panel will help the YMB fulfil the objectives!

IMechE Strategy 2012-2017

- SO1 Diversify and grow professional membership in UK and internationally
- SO2 Increase member engagement and value to members and their employers
- SO3 Expert leadership to Government, Industry, Members and the informed public on Engineering
- SO4 Develop awareness of engineering and profile of the IMechE
- SO5 Inspire young people about engineering
- SO6 Secure long-term financial position

YMB strategy

Below you will find a table of the main parts of the above strategy the YMB have focused on. Could you as a panel let us know a STEM activity so we can promote it? Could your panel run an event for international students? Once you know the strategy you can help us all work together as an Institution.

| | IMechE Strategic Intent | 2012 Institution Target | 2012 YMB Target |
|----------|--|--|--|
| 1 | Diversify and grow professional membership in the UK and internationally: | | |
| 1.1 | Achieve long term sustainable membership base through continuous growth. | Achieve 100,000 members. Gender Diversity trending with profession. | |
| 1.2 | Grow the International Membership. | Create an International PEI team. Increase rate of new international paying applicants by 5%. | Raise awareness of IMechE and YM career development by engaging with 100 Affiliate members at Formula Student. 30% of YM panels run an event to engage international students currently studying in the UK. |
| 1.3 | High standards of professional registration, with best in class application process. | Improved applicant assessment processes achieving high benchmark with full on-line application capability for standard routes. | |
| 1.4 | Be the fastest growing engineering Institution with increasing levels of membership. | In top 2 PEIs for total new registrants. | |
| 2 | Increase member engagement and value to members and their employers | | |

| | | | |
|-----|--|--|---|
| 2.1 | Create and deliver a Learned Society programme suite (including digital offerings) relevant to members, industry, employers, academia and informed society with emphasis on engineering. | Increase by 5% the number of delegates participating in or interacting with our Learned Society programmes, and sustained improvement in member survey results. | Creating 2 handouts for Project Management and Presentation skills. |
| 2.2 | Optimise channels of interaction with members, target audiences and influencers holistically across the whole organisation including commercial and Support Network. | Increase virtual and real values for membership. Develop specific IEng, EngTech and academia programmes. | <p>Increase blog visitors by 10% and number of comments by 10%. Maintain 25% of visitors returning. Encourage bloggers to post regularly (eg once every two months minimum).</p> <p>Recruit 5 new bloggers.</p> <p>Produce quarterly Newsletter and distribute to the YM network.</p> |
| 2.3 | Improve the value proposition to members and employers. | Develop training as a valued member and employer offering. Continued improvement in the offer to members and commercial differentiation over non-members. Deliver approved OBW design to add member value. | <p>Create booklet of YM 2012 winners for distribution at Annual Dinner.</p> <p>Add a 'Mentor of the Year' Award to the YM Awards.</p> |

| 3 | Expert Leadership to Government, Industry , Members and the informed public on engineering | | |
|-----|---|---|--|
| 3.1 | Setting the agenda with practical advice to Government, Members and the informed public. | Focussed national & regional government engagement and interaction. | |
| 3.2 | Promote innovation in engineering. | Major event or engagement activity. | |
| 3.3 | Collaboration with other Institutions and organisations to achieve greater engineering gravitas and financial impetus. | Take a leading role in Government support through Engineering the Future and E4E. | |
| 3.4 | Evolve Learned Society to a modern and relevant structure or ensure a structure that effectively delivers a Learned Society to Members. | Implement change plan including new Learned Society structure. | |

| | | | |
|----------|---|---|---|
| 3.5 | Increase reach and influence across digital channels. | Develop additional owned media. | Achieve 100 (+59) Facebook Group members / 240 (+20%) Twitter feed followers / 100 LinkedIn Group members (+62). Establishment of active YM online communities using (some or all of) Facebook, Twitter, LinkedIn and YouTube. |
| 3.6 | Create a 21st Century Knowledge Centre. | Upgrade the library and start integration with other Engineering information services. Increase digital content creation. | |
| 4 | Develop awareness of engineering and raise the profile of the IMechE | | |
| 4.1 | Promote the Institution: - A campaigning Institution - Increase non-member reach - Generate interesting media content using D&Gs and expert members - A well known respected Institution. | Increase overall media coverage and informed public awareness scores. | Establish charity grant for Young Members creating 3 PR opportunities. |

| | | | |
|----------|--|---|--|
| 4.2 | Create a respected public profile centred on key themes of Energy, Environment, Manufacturing and Transport. | Deliver engagement programme of publications and events. Grow on-line profile. | Deliver a photography competition to highlight an engineering topic: 3 age groups: Engeneration, Affiliate and Associate. Competition based on the key themes including the Olympics & Paralympics. 15 entries target. Print winners on canvas for display at IMechE. Run June-October. Entrants write why they have taken the photo and what it means to them. |
| 4.3 | Broaden the appeal and importance of engineering to society and employers. | Deliver unified promotion and awareness activities through Regional structure (including internationally). More engagement of companies and employers. Engineered in Britain to continue. | Improve YM representation on D&G committees by 10%. |
| 5 | Inspire young people about engineering | | |
| 5.1 | Provide intellectual leadership in STEM education and training policy. | Deliver leading high profile policy statements through E4E on national impact strategies. | |
| 5.2 | Provide educational outreach programmes which engage members. | Deliver education outreach programme through high profile, high-impact partnerships, centred on Big Bang, Bloodhound and Primary Engineer. | Promote 10 STEM engagement successes to the membership. |

