

ISPE Student Chapter Standard of Excellence Training Program Planner



Part 1 of 3

Annual Planning Meeting (August/September)		
Student Chapter		
Local Chapter		
Date		
Time		
Location		
Attendees	Title	Name
	Chapter Student Affairs Chair	
	Faculty Advisor	
	Industry Advisor	
	Industry Advisor	
	Student Chapter President	
	Student Chapter Vice-President	
	Student Chapter Treasurer	
Student Chapter Secretary		
CD Handout	Description	File Type
	Student Chapter Handbook	PDF
	ISPE Student Road Show	PPT
	Student Chapter Excellence Form	EXCEL
Paper Handouts	Description	Note
	PowerPoint Planning Agenda (Note Form)	Printed from Specific Updated Version
	Student Chapter "Cheat Sheet"	Printed from Student Handbook
	Website and ISPE Logo Branding Guidelines	Printed - obtain from ISPE Web site or Tracey Ryan, tryan@ispe.org
ISPE Literature Copies (Membership Package)	ISPE Info Packages provided by Local Chapter	
Review/Plan	Description	Note
	Introductions	All
	Review handouts	Overview of what is on CD and where to go for information, including ISPE "Campus Connection" - Best presented via direct web connection and present live
	Review of organization and responsibilities	Utilize "Cheat Sheet" and Student Handbook. Copy is on CD.
	Review Chapter Excellence	Discuss format for tracking purposes
	Determine events & tasks	Plan dates for meetings/tasks (Meetings/Programs/Reports, etc.). Discuss opportunities with local Chapter for tours, programming, speakers, etc. prior to planning meeting. Discuss and plan marketing methods for best success.
	Chapter Membership Growth	Discuss recruiting for upcoming officers
	Community Outreach	Involvement with local Chapter charity; visit to secondary schools to discuss ISPE
Schedule April/May Turnover Meeting	Important to schedule this and work toward it throughout the year.	
OTHER	Description	Note

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Part 2 of 3

Events Planning (August/September)					
Student Chapter					
Local Chapter					
Event	Planned Date	Description	Comment	Responsibility	Completed
Annual Planning Meeting		August/September Meeting		All	<input type="checkbox"/> Yes
Board Meeting #1					
Meeting Minutes	2 weeks after meeting		Send to ISPE	Secretary	<input type="checkbox"/> Yes
Membership Meeting #1 - List Topic					<input type="checkbox"/> Yes
Marketing		Advertising of Event Plan			<input type="checkbox"/> Yes
Meeting Attendees List	2 weeks after meeting		Send to ISPE		<input type="checkbox"/> Yes
Board Meeting #2					
Meeting Minutes	2 weeks after meeting		Send to ISPE	Secretary	<input type="checkbox"/> Yes
Membership Meeting #2 - List Topic					<input type="checkbox"/> Yes
Marketing		Advertising of Event Plan			<input type="checkbox"/> Yes
Meeting Attendees List	2 weeks after meeting		Send to ISPE		<input type="checkbox"/> Yes
Board Meeting #3					
Meeting Minutes	2 weeks after meeting		Send to ISPE	Secretary	<input type="checkbox"/> Yes
Membership Meeting #3 - List Topic					<input type="checkbox"/> Yes
Marketing		Advertising of Event Plan			<input type="checkbox"/> Yes
Meeting Attendees List	2 weeks after meeting		Send to ISPE		<input type="checkbox"/> Yes
Board Meeting #4					
Meeting Minutes	2 weeks after meeting		Send to ISPE	Secretary	<input type="checkbox"/> Yes
Membership Meeting #4 - List Topic					<input type="checkbox"/> Yes
Marketing		Advertising of Event Plan			<input type="checkbox"/> Yes
Meeting Attendees List	2 weeks after meeting		Send to ISPE		<input type="checkbox"/> Yes

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Part 2 of 3

Events Planning (August/September)					
Student Chapter					
Local Chapter					
Event	Planned Date	Description	Comment	Responsibility	Completed
Local Student Poster Competition	Per Local Chapter— get this date early for advertising				<input type="checkbox"/> Yes
Student Chapter Calendar of Events	between Aug. 30 and Sept. 30		Send to ISPE	Vice President	<input type="checkbox"/> Yes
Student Chapter Budget	between Aug. 30 and Sept. 30		Send to ISPE	Treasurer	<input type="checkbox"/> Yes
Latest Fall Meeting Minutes	between Nov. 15 and Dec. 15		Send to ISPE	Secretary	<input type="checkbox"/> Yes
Treasurer's Report and income/expenses	between Nov. 15 and Dec. 15		Send to ISPE	Treasurer	<input type="checkbox"/> Yes
Current Officer/Advisor contact sheet	between Nov. 15 and Dec. 15		Send to ISPE	Secretary	<input type="checkbox"/> Yes
Current Roster of Members	between Nov. 15 and Dec. 15		Send to ISPE	President	<input type="checkbox"/> Yes
Latest Spring Meeting Minutes	between April 25 and June 1		Send to ISPE	Secretary	<input type="checkbox"/> Yes
Treasurer's Report and income/expenses	between April 25 and June 1		Send to ISPE	Treasurer	<input type="checkbox"/> Yes
Election Results/Advisor contact sheet	between April 25 and June 1	Elections for upcoming year	Send to ISPE	Secretary	<input type="checkbox"/> Yes
President's Report	between April 25 and June 1		Send to ISPE	President	<input type="checkbox"/> Yes
Annual Turnover Meeting	April/May		All		<input type="checkbox"/> Yes
Chapter Excellence	Ongoing but there will be a specific submission date				<input type="checkbox"/> Yes
Student Chapter Recognition Form	By October 1	Optional awards program	Send to ISPE	All	<input type="checkbox"/> Yes
Newsletter Updates					<input type="checkbox"/> Yes
Web site Updates					<input type="checkbox"/> Yes
*Student Chapter Quarterly Update via email to Tracey Ryan				President/ Secretary	<input type="checkbox"/> Yes

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Part 3 of 3

Turnover Meeting (April/May)		
Student Chapter		
Local Chapter		
Date		
Time		
Location		
Attendees OUTGOING Board/Advisors	Title	Name
	Chapter Student Affairs Chair	
	Faculty Advisor	
	Industry Advisor	
	Industry Advisor	
	Student Chapter President	
	Student Chapter Vice-President	
	Student Chapter Treasurer	
Student Chapter Secretary		
Attendees INCOMING Board/Advisors	Title	Name
	Chapter Student Affairs Chair	
	Faculty Advisor	
	Industry Advisor	
	Industry Advisor	
	Student Chapter President	
	Student Chapter Vice-President	
	Student Chapter Treasurer	
Student Chapter Secretary		
Review	Description	Note
	Introductions	Outgoing Board/Advisors introduce New Board Officers
	Year in review (successes/challenges/needs for upcoming year)	Outgoing Board/Advisors
	Review all outstanding paperwork - utilize Events Planning and Chapter Excellence Forms for Guidelines	Review and complete all required forms for ISPE, including financial reports, etc.
	Set date, location and plan for Annual Planning Meeting in August/September	
Plan first Program for upcoming year	Determine direction and date for first program of next academic year to ease last minute responsibility in August/September	
Other	Description	Note