

SWE Strengthens Its Support of Global & Domestic Components With Chapter Performance

Uncover how SWE transformed its operations and empowered its global network using the revolutionary power of Chapter Performance.

re:members
Chapter Performance



For much of its 70-year history, the Society of Women Engineers (SWE) has been a U.S.-based organization. But ten years ago, SWE started attracting members outside the U.S. In the last five to six years, the number of its global components (affiliates) has grown immensely.

The problem

As subsidiaries of SWE, global affiliates are not authorized to open bank accounts, which made it difficult to collect event registration and sponsorship payments. Receiving funds from HQ was a lengthy and expensive process, especially when mailed checks were returned to SWE. Workarounds were not scalable.

Because SWE components have a critical role in delivering its mission to members, SWE and its affiliate volunteer leaders agreed on the need to find an enterprise-level solution for improving affiliate operations outside the U.S.

The solution

After researching solutions, SWE's chief financial officer and chief executive officer presented re:Members Chapter Performance to their board as a solution that would completely revolutionize the way SWE served members globally and fueled international growth. This solution solves challenges experienced within SWE sections in the United States as well.

Fast facts about the Society of Women Engineers

Mission: Empower women to achieve their full potential in careers as engineers and leaders

Association type: Professional society

Members: 43,000+ individual members

Staff: hybrid workforce of 40+ association professionals

Components: 300 collegiate member sections, 100 professional member sections, and 100 global affiliates in 30+ countries

Association management system: Fonteva

Giving Components All the Tools Needed to Grow + Prosper

Karen Horting, CAE, executive director and chief executive officer, said, "Our global affiliates were the impetus behind our search, but we quickly learned that re:Members Chapter Performance was also the ideal solution for several challenges we were having with our domestic sections too."

"The Chapter Performance solution helps us all work smarter, not harder and accelerates the value-add our sections deliver to our membership."

For SWE's professional and collegiate sections in the U.S., managing finances was especially challenging during leadership transitions. Busy volunteer leaders had to schedule time for bank visits, paperwork updates, and notifications to HQ.

When SWE introduced re:Members to its volunteer leaders, they described it as a financial management system designed for the non-accountant.



You don't have to be a finance whiz to use the system effectively. With simple training, a lot of the barriers towards solid financial management are reduced."



Honna George

Deputy Executive Director at SWE

Affiliates and sections use re:Members Chapter Performance to receive financial transactions directly and quickly from HQ. They also rely on it to pay bills, manage invoicing, and deposit revenue, such as sponsorships and donations, while also using it to host and manage local events.



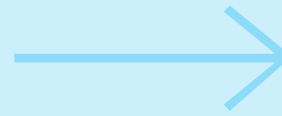
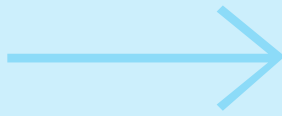
re:Members Chapter Performance Ensures Volunteer Leaders Comply with their Fiduciary Responsibilities

In the past, the lack of fiscal control and oversight of volunteer-run components weighed on the mind of SWE staff. Now, compliance with segregation of fiduciary duties is enforced by the Chapter Performance software. **The risk of volunteer error or fraud—both unintentional and intentional—is greatly reduced.**

When section leaders changed each year, volunteers found it difficult to manage all the paperwork required for transferring accounts to incoming leaders and maintaining banking access. The transfer of this responsibility is built into re:Members Chapter Performance.

A Smooth Financial Transition

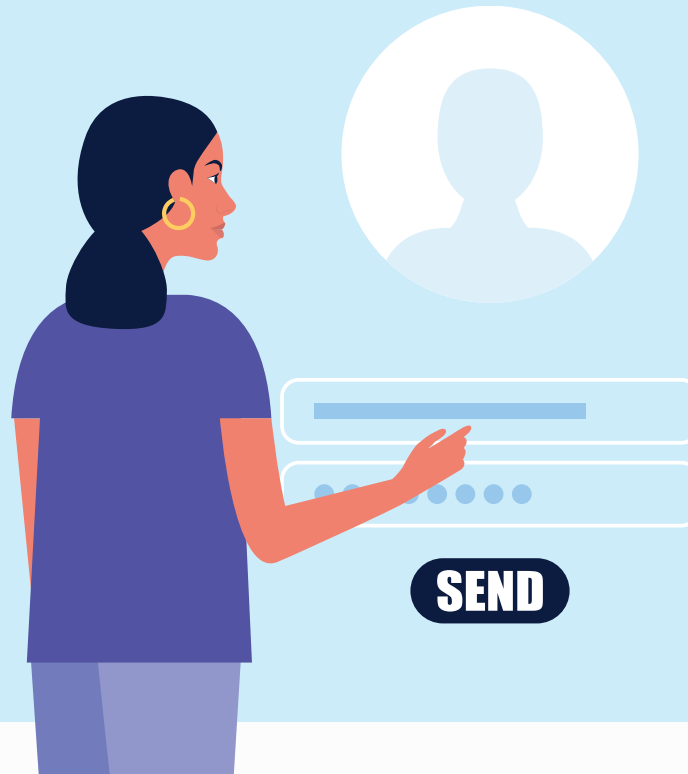
“They’re volunteers, so sometimes something comes up at work or a parent is sick. Suddenly, they disappear from SWE,” said Karen. “In the past, with traditional banking, component business came to a halt. But now, HQ can intervene. We can go into re:Members Chapter Performance, make updates, and keep things moving for affiliates and sections.”



When a member’s leadership role is updated in the association management system, it’s also automatically updated in the component’s re:Members account.

New leaders receive an activation code via email to set up their system credentials.

It is easier for Leaders to be in compliance with SWE’s financial requirements since re:Members Chapter Performance ensures a smooth transition of financial responsibilities.



SWE Improves the Leadership Experience by Reducing the Administrative Burden for Volunteers

With re:Members Chapter Performance, it's easier for section and affiliate volunteer leaders to track member and membership information, reconcile financial accounts, and generate budget and financial reports.

Components also use [re:Members' Event Management](#) module. Volunteer leaders are now better equipped to handle fiduciary responsibilities.

"Some of the strategic guidance from the board has been to **reduce the administrative burden for volunteer leaders so they can focus more time on serving members and less time on administration**, and re:Members certainly accomplishes that," said Honna.

"Sometimes, qualified members didn't pursue a leadership position due to all the administrative tasks involved. Now all that is pretty turnkey," said Honna. "If we can help support leadership responsibilities, my hope is that would encourage stronger leadership recruitment and retention."



The Key Benefits of Chapter Performance

Karen shared some of the benefits for SWE:



re:Members Chapter Performance provides more financial transparency for HQ, but also gives volunteer leaders more control.



Leaders can do things themselves now without needing HQ's intervention, like accepting sponsorship payments.



Affiliates no longer have to ask the sponsoring company to wire the funds to HQ and then wait for SWE to disburse the funds back to the affiliate.



Sections/affiliates can manage funds on their own, which helps them build local partner relationships.



Thanks to re:Members, SWE section and affiliate leaders have more time to work on events and other member engagement activities.



They can focus on the mission, not the backend. The impact of this is increased member value, increased retention, and increased revenue.

SWE Saves Hundreds of Hours of Staff Time

Section and affiliate financial transactions were a big headache for HQ membership, accounting, and executive staff. Twice a year, SWE sends dues rebates to its domestic sections. This manual process involved:

- ✓ Calculating and uploading each rebate with supporting documentation
- ✓ Verifying and updating addresses
- ✓ Double-checking everything
- ✓ Approving and uploading payments
- ✓ Mailing checks
- ✓ Dealing with the inevitable returned mail



“As you can imagine, all that manual work is just a huge HQ time investment and opportunity for errors.”



Karen Horting, CAE

Executive Director & Chief
Executive Officer at SWE

Now, dues rebates are sent via a re:Members electronic transfer. Because each member’s unique ID in the AMS is mapped to re:Members Chapter Performance, the rebate process now only requires a simple file upload.

“re:Members Chapter Performance is easily saving us 120 to 160 staff hours a year on section rebates,” said Honna. “The staff handling these administrative tasks now have better things they do with their time.” Karen said, “Now they can use that time for more valuable strategic work that advances our mission.”



re:Members Solves Global Financial Transaction Problem for SWE

But those 120 to 160 staff hours only represent the time saved on section rebates. “Global transactions took much more staff time than section rebates,” said Honna.

Payments to SWE affiliates were even more complicated because the procedure was different for each country.

Karen and the CFO had to get involved with approvals and international wire transfers for each one, which were very expensive. Now, re:Members Chapter Performance solution efficiently and inexpensively handles all of that.



SWE Strengthens its Relationship with Components

SWE is requiring sections and affiliates to use re:Members Chapter Performance to receive rebates and other funds from HQ. “Sections can use it for banking too. We’re not forcing them to give up their traditional bank accounts if they don’t want to. We’re leaving that up to them at this point.”

“re:Members provides very comprehensive live and recorded training sessions, plus optional training on other functionality, like event management,” said Karen.

During rollout, SWE staff communicated with their components “early and often” about re:Members Chapter Performance using a mix of methods:

- ✓ Dedicated re:Members webpage
- ✓ Email campaigns
- ✓ In-person and online meetings with recordings





Staff Regularly Asked for + Responded to Feedback

“We let our volunteer leaders know we’re walking with them. There’s always been a strong rapport between sections and HQ, but there’s always room for improvement, and this software helps,” Karen said.

“Our component leaders feel like we listened to them and really tried to find something that would work.”

Because SWE is supporting volunteer leaders who needed a better way to manage component finances and administration, they’re building goodwill as an organization.

“We talk about One SWE, having a consistent experience for both our members and volunteer leaders, wherever they are in the world. With re:Members Chapter Performance, we’re building on that One SWE concept in how we support our volunteer leaders.”



Let us show you what's possible with

re:members Chapter Performance

re:Members Chapter Performance helps associations manage their components in the U.S. and around the world. Learn how we can help you enhance component relations, operations, and performance.

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