



The American Society of Mechanical Engineers

TWENTY-NINE WEST THIRTY-NINTH STREET, NEW YORK 18, N.Y. • PENNSYLVANIA 6-9220

Organization Committee Sub-Committee on Affiliations Progress Report

April 1956

The Sub-Committee was directed to survey the status of the Society's working relations, or affiliations, with other organizations. The Sub-Committee made a preliminary report in May 1955 and now offers this report, not as a final report but rather one of progress.

Scope of this Report

The Sub-Committee finds that the matter of affiliation (and that term is used here in its broad meaning) is a most important matter and one which goes deep into the everyday life of the Society as well as having a very grave effect on the long term growth and welfare of the Society and its membership. The Society is presently involved in so many affiliations of one type or another, and there are so many possibilities lying ahead, that we can only hope to bring to your attention at this time some of the more urgent situations. Reference to this aspect of the problem is being made in the recommendations.

Conclusions

The following conclusions have been determined:

1. The Society cannot advantageously exist without affiliation in some form or other with other organizations.
2. The Society has working agreements with nearly seventy-five other organizations. Definite objectives and criteria should be formally established for use in considering both presently existing and prospective cases.
3. The Society has lost much due to its not having a virile policy vigorously administrated.
4. Some affiliations have been and now are of great benefit in forwarding the work of the Society, others may be of doubtful value.
5. An effort should be put forth to the end that the number of affiliations which are of top importance may be increased, and the others gradually, but surely, reduced to a minimum consistent with the Society's already existing obligations.

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6. Much good work has been done by the several segments of the Society in their co-operative work with other organizations. These works form solid foundations upon which future expanded activities can be built.

7. Definite objectives and criteria are needed for use in the consideration and evaluation of both presently existing and prospective cases.

Discussion

OBJECTIVES: Before analyzing the types of affiliations and cooperative arrangements, and developing objectives and criteria, it seems self evident that any such activity must

1. In no manner conflict with the Society's constitutional aims and objectives.
2. Promote the enhancement of the technological, temporal and economic status of the Society membership.
3. Promote an enlargement of the benefits according to the public through increased creative and productive effort of the part of the engineer.
4. Promote more aggressive participation by the engineer in public affairs both governmental and social. (All affiliation need not, and probably should not, be confined solely within the technical field.)

TYPES OF AFFILIATIONS AND JOINT ACTIVITIES: Existing cooperative arrangements, and those that might be developed in the future, would seem to fall into one of the following categories:

1. Membership in Established Bodies. For example, in the American Association for the Advancement of Science; a distinction might be made between adherence to an existing organization, such as AAAS, and participation in bodies such as Engineers Joint Council, in the formation of which the Society had a part.

It is, however, generally characteristic of these "memberships" that the Society participates on an equal basis in a more or less permanent joint activity with broad general objectives.

- (2) Joint Activities for Specific Purposes: The Society cooperates in a wide variety of joint activities with specific and limited objectives - joint administration of awards, joint sponsorship of meetings, joint activities in publications, research, standards, etc. In addition to generally limited purposes, these joint activities are often of a temporary nature, limited to the accomplishment of a specific project.
3. Bilateral Agreements for Specific Purposes: An example of this would be the membership interchange agreement with AIEE.
4. Bilateral Affiliation with Other Societies: Examples in this category would be the affiliation with the Engineering Institute of Canada (EIC) and with the American Rocket Society (ARS). Such cooperative arrangements are of a more general nature than those in category (3), and are usually for an indefinite term, subject to termination by agreement or notice.
5. Bilateral Affiliations with Sub-Professional Groups: These might be generally similar to those of (4) but with groups whose membership includes sub-professional personnel. No such affiliations are now in force.
6. Joint Activities Engaged in by Divisions and Sections: Examples would be section memberships in local engineering associations, cooperative agreements between professional divisions and other societies or divisions of other societies. Unlike all the preceding categories, the Society as a whole is not a party to the agreement.

Most of the present joint activities of the Society are comprised in categories 1, 2, 3 and 6 above. To some extent, these relations are covered by pertinent portions of the Constitution, By-Laws and Rules and Directives of Council, and procedures for initiation and approval are reasonably well understood. Some clarification of procedures and criteria would undoubtedly be worthwhile and such a statement might well be prepared by Staff for the guidance of those involved.

In many respects, the affiliations comprised under category (5) above could be of wide general importance to the Society. The problem of Sub-Professionals has been at the root of many "splinterings" and many new societies have sprung up to take care of portions of the field where sub-professional membership might run large. Yet affiliations in this area run afoul of the properly high standards set for membership in the Society. The sub-committee is fully aware of this problem and of the incentives for finding a solution to it, but it is not prepared to make specific recommendations at this time.

The remainder of this section of this report thus deals with category (4) above, and the term "affiliation" as used hereafter refers to this type of cooperative activity.

PRIMARY AND SECONDARY AFFILIATIONS: The sub-committee believes it useful to distinguish between what might be termed "Primary" affiliations and "Secondary" affiliations. Primary affiliations involve continuing joint activities with societies of generally equal stature, particularly with respect to membership standards. Secondary affiliations involve joint action with societies of "junior" status, or lower membership standards. An example of the Primary type is the EIC affiliation; of the Secondary type, the ARS affiliation.

CRITERIA: In addition to the requirements outlined heretofore, certain specific criteria apply to both the Primary and Secondary types: (1) There should be a common interest in the art and science of engineering and the related arts and sciences. (2) The affiliation should benefit both groups and the profession. (3) Both groups should have generally similar standards and patterns of technical activity.

NATURE OF AFFILIATION: The exact nature of the joint activities undertaken as part of an affiliation agreement will, of course, vary with the specific circumstances of each case. The following seem appropriate for consideration in either Primary or Secondary affiliations: (1) Joint technical activity and meetings. (2) Such collaboration in publications, committee work, staff operations and other relevant activities as might be mutually desirable. (3) Members of each group privileged to attend meetings of the other without fee or at same fee charged regular members. In Secondary affiliations, a cooperating organization would have the same status in ASME program making activities as a Division.

In the case of Primary affiliations, arrangements for an interchange of membership privileges with a combined rate of dues might be appropriate. For Secondary affiliations, members of the affiliated group desiring ASME membership would have to meet ASME standards and pay ASME dues, but initiation fees might be waived or the equivalent of the affiliate's initiation fees might be credited against the ASME initiation fee.

RECOMMENDATIONS

The Sub-Committee offers these recommendations as being appropriate at this time:

1. The sub-committee recommends expanded activity in developing affiliations and cooperative arrangements, to bring greater unity into the mechanical engineering field and to counteract further tendencies to "splintering". This activity should be selective - directed toward strengthening the really worthwhile ties with other groups and developing new relations of visible merit, while gradually reducing the number of cooperative arrangements of dubious value. In this program, the Professional Divisions should have a much larger role than they have had thus far.
2. In affiliations of the Primary and Secondary types, some representation on each other's governing board would be desirable, such representation to be without vote.
3. For the continued success of each affiliation, a Joint Policy Committee should be set up, comprising representatives of both societies. This Joint Policy Committee would deal mainly with policy; it would appoint such sub-committees as needed to handle operating matters. For Primary affiliations, the ASME membership of the Joint Policy Committee would report direct to Council; for Secondary affiliations, it would report to the Board on Technology or other appropriate Board.
4. A consistent and vigorous program of joint activities requires central direction. This direction should rest with the Organization Committee. Accordingly, it is proposed that the Organization Committee designate a Continuing Committee on Affiliations. This committee would review all existing and proposed joint activities and affiliations and recommend action. It would also be charged with the affirmative responsibility of seeking out areas for cooperative activity and arranging for their investigation.

Proposed joint activities, whether developed by the standing committee on affiliations, suggested by other committees or individuals, or proposed from without the Society, would be referred by the standing committee on affiliations to the appropriate division or committee for study and recommendation.

If recommended by the appropriate division or committee, and, in turn, by the continuing committee on affiliations, the Organization Committee would secure Council approval to explore affiliation possibilities with the other society involved. This exploration would be handled by the continuing committee on affiliations, enlarged for the purpose by the addition of one or more members with special knowledge of the field (drawn from the appropriate professional division, if there is one). This enlarged committee would be empowered to negotiate a tentative affiliation agreement agreeable to the other society involved. This tentative agreement would be submitted to the Organization Committee and by it to Council for approval. With approval by the governing boards of both societies, the affiliation agreement would go into effect.

GENERAL

This Progress Report makes recommendations on only a part of the entire problem of affiliations. The Sub-Committee believes that a very appreciable amount of work and time will be required to cover the remainder of the field and therefore to expedite the work, members from several segments of the Society should be invited to assist in the study in those specific or limited areas where they are familiar. It is suggested that to implement this plan, the Organization Committee Chairman be empowered to appoint Temporary Sub-Committees, with or without Organization Committee members thereon, to work under the guidance of the Sub-Committee on Affiliations, the latter Sub-Committee coordinating the work and screening the results.

Respectfully submitted

F.L. Bradley

L.N. Rowley

T.E. Purcell - Chairman

Sub-Committee on Affiliations



VARIOUS OPERATING YEARS OF THE SOCIETY

At a meeting of the Council held in Chicago, November 11 and 12, 1955, it was voted to request the Organization Committee to study the present conflict among the Administrative, Fiscal, Section, Student Branch and Publication years in an effort to simplify the existing structure where possible.

A superficial review of this matter would seem to indicate that it is rather absurd to have so many operating years within the Society, but more careful investigation reveals some very poignant reasons for each year to be as it is, and also develops some real problems to be solved if any rearrangement is to be undertaken. The subject has been considered periodically in the past e.g. the Group Delegates Conference made a similar recommendation in June 1945. As a result of this action the Council first referred the matter to the Finance Committee which felt that it was unwise to make any changes in the Society's fiscal year. On January 29, 1945 the Executive Committee of the Council voted "To retain the Society's fiscal year beginning October 1, and to ask the Secretary to report at the February meeting on the advantages and disadvantages of changing the administrative year from the present one to a year ending June 30."

Upon receiving Secretary Davies' report the Executive Committee of the Council voted on February 26, 1946 "to make no change in the present administrative year of the Society."

There are five calendars now in effect in the Society:

1. the Fiscal year begins October 1,
2. the Administrative year begins at the Annual Business Meeting (usually about December 1st),
3. the Section and Student Branch years begin July 1st,
4. the Regional year begins approximately April 1st,
5. the Publication year coincides with the calendar year.

On Chart I, attached, an attempt has been made to show graphically these various operating years of the Society as they now exist.

It would probably be unwise to attempt to change the fiscal year because of the expense and confusion resulting. Such a change would contemplate an interim bill to bring each member to the newly established date plus a succeeding annual billing. The cost of this dual billing in one year would be quite substantial. In addition, two sets of financial and other reports in a single year would still further increase both the cost and confusion. Before dismissing this subject, however, the

possibility of rotative billing should not be overlooked. In a society of 40,000 members billing one twelfth of the membership each month would certainly spread the accounting load and might result in some real savings in this department. If this were adopted, the fiscal year could then begin at any time.

In a like manner, it would appear unwise to tamper with the Publication year which coincides with the calendar year. Subscribers, advertisers and libraries are accustomed to publications that operate on a calendar year basis, and any advantage gained through changing this schedule is so small that the consequent confusion does not seem justified.

As one studies the chart further it would appear that the principal administrative difficulty lies in the fact that a new Regional Vice-President does not take office until approximately nine months after the preceeding Regional Administrative Conference. As a result he steps into a period of Regional, Section and Student Branch activity which has been planned some nine months previously and with which he is only vaguely familiar. It is suggested, however, that closer liasion between the outgoing and incoming Vice-Presidents for the Region might easily overcome the problem. The constitution provides that the incoming President sit with Council and the Organization Committee as soon as his election is determined in order that he may familiarize himself with the operations of the Society. No doubt a similar period of indoctrination should be provided for the incoming Vice-President. Any overlaps or gaps which now exist due to changes of officers and committee personnel in the Regional Organization could be eliminated by closer cooperation between the out-going and incoming individuals concerned. At the same time, a more complete orientation of all people involved would go far toward solving current difficulties. If this were done, the need for rearranging the various operating years of the Society would no longer seem required.

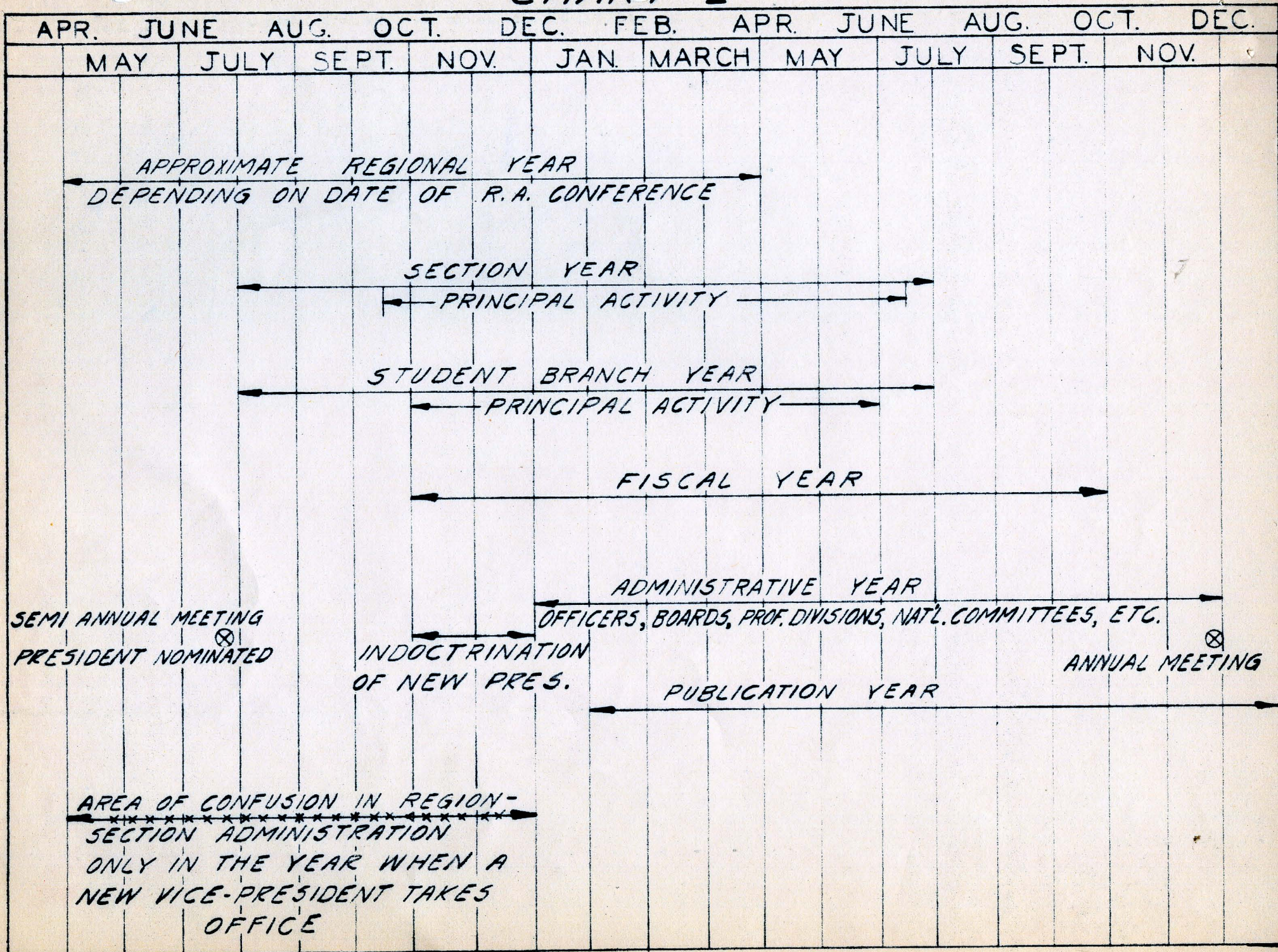
If it is felt that such a scheme is not practical, then we should explore the possibility of bringing the Administrative, Section and Student Branch Calendars together. Chart II, attached, is illustrative of what might be done in this direction. As mentioned previously the Fiscal and Publication years should probably not be changed at this time. Chart II, however, endeavors to bring together all the remaining calendars of the Society. It suggests that the Administrative year be changed to coincide with the Section and Student Branch Years, which begin on July 1st. Under this plan it is contemplated that the Annual Meeting would be held late in June. All annual reports (except financial) would be made at that time and all officers, administrative bodies, boards and committees under their jurisdiction would function under an "operating year" commencing July 1st. The Semi-Annual Meeting would then be held in late November or early December at which time the annual financial statement would be presented and other activities now assigned to this meeting be conducted. Under this arrangement it is assumed that a budget for the ensuing fiscal year could be adopted at the Annual Meeting (June) to become effective at the beginning of the next fiscal year (October 1).

This rather drastic change in the Administrative year would necessitate a number of changes in the Constitution, By-Laws and Rules and would require a separate mailing of election ballots, as indicated. It also could present a problem in finding a date in June for the Annual Meeting which does not conflict with the dates of the annual meetings of several of our sister societies who for many years have held their meetings at this time of year. In addition, during the transition period there might be certain difficulties because of a seven month operating year (December 1 to July 1) when previously elected and appointed officials would either hold over, or newly elected and appointed members would serve for a "short" term. The principal advantages of the change seems to be at the Regional level by bringing the National Administrative year in line with the Section and Student Branch calendars.

After careful consideration of all of the factors involved, the Organization Committee recommends that no change be made in the various operating years of the Society as they now exist.

The Organization Committee

CHART I



CHAR - II

