



**IEEE**

***IEEE Seattle Section  
Leadership Training  
Excom Mtg 11 March 08***

Leadership Training

# *Training Topics*

- ◆ **IEEE Overview**
- ◆ **IEEE Governance**
- ◆ **IEEE Management**
- ◆ **IEEE Operations**
- ◆ **Support for Volunteers**
- ◆ **Value for Members**
- ◆ **Calendar**
- ◆ **Technical Activities**
  - **speaker/workshop opportunities**
  - **meeting locations**



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## ***IEEE Overview***

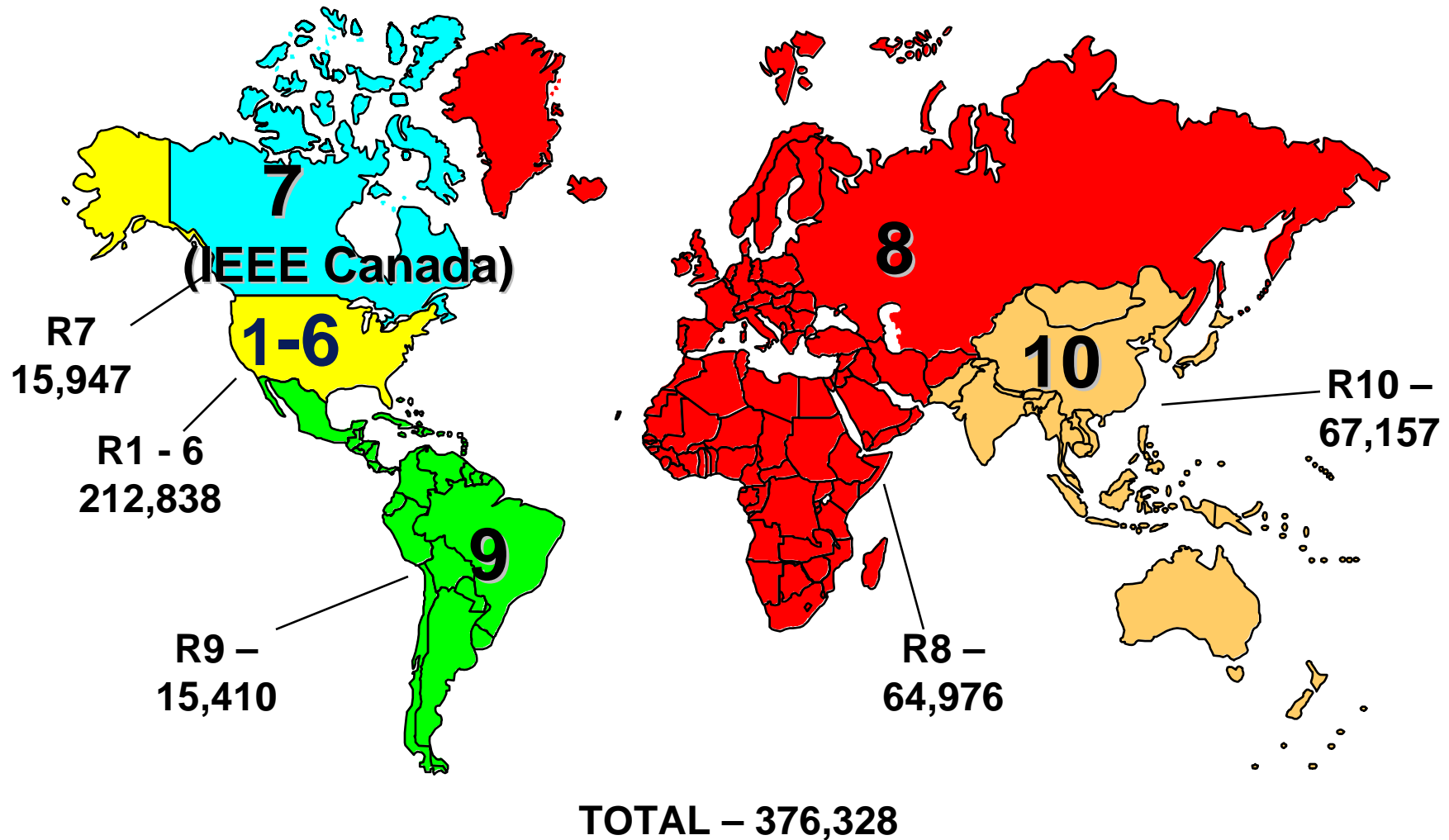
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# *IEEE Today*

- ◆ Over 376,000 members in approximately 174 countries
  - approximately 43 percent of whom are from outside the United States, up from 38% in 2003
- ◆ Over 79,000 student members.
- ◆ Over 30,000 society affiliates.
- ◆ 311 sections
  - 1,384 Technical Chapters.
- ◆ More than 1,400 student branches in 80 countries.
  - Over 300 student branch chapters.
  - More than 130 Affinity Groups
- ◆ 39 societies and 3 technical councils

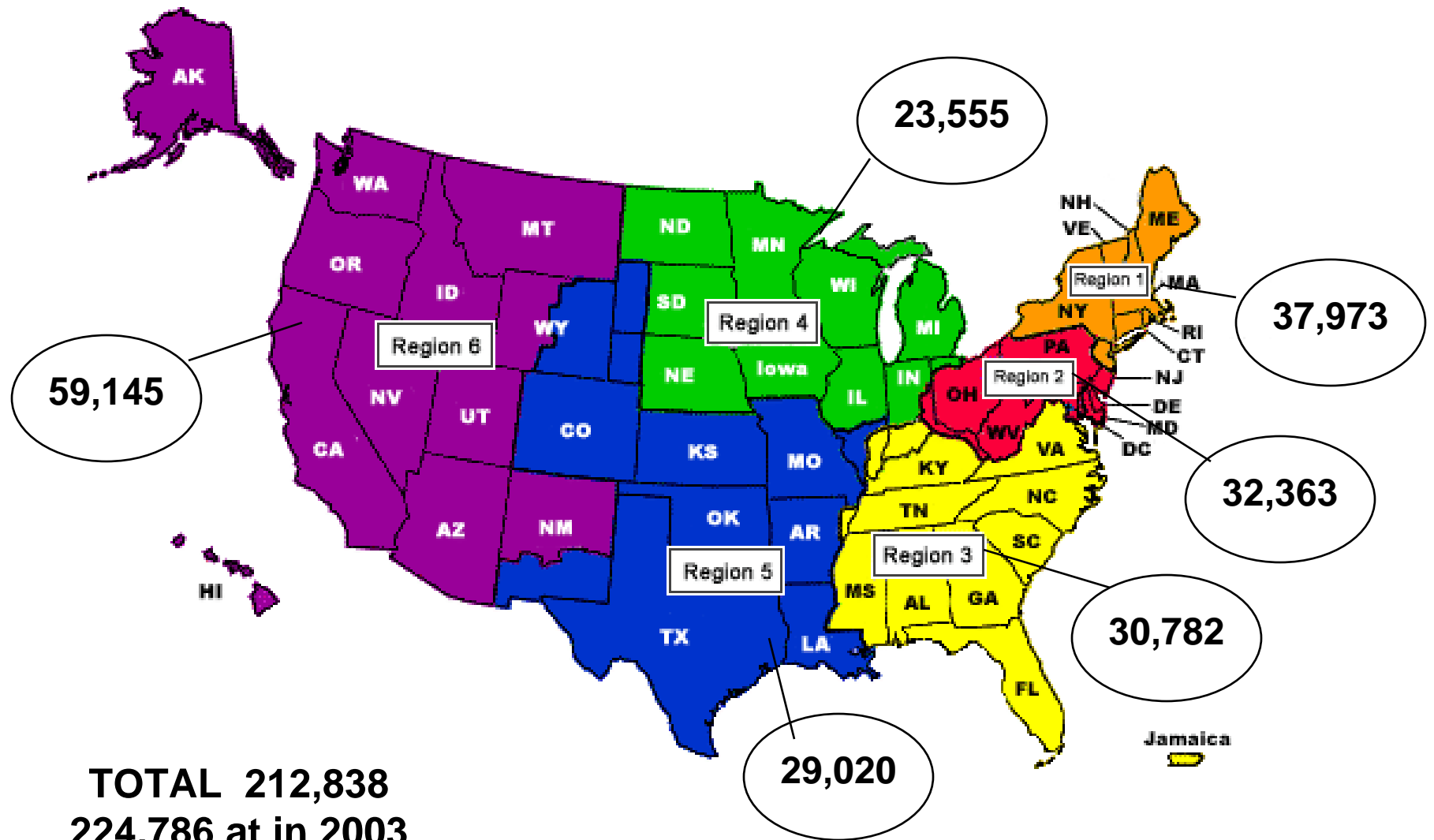
# IEEE Membership By Regions

31 December 2007



# IEEE Membership By U.S. Regions

31 December 2007



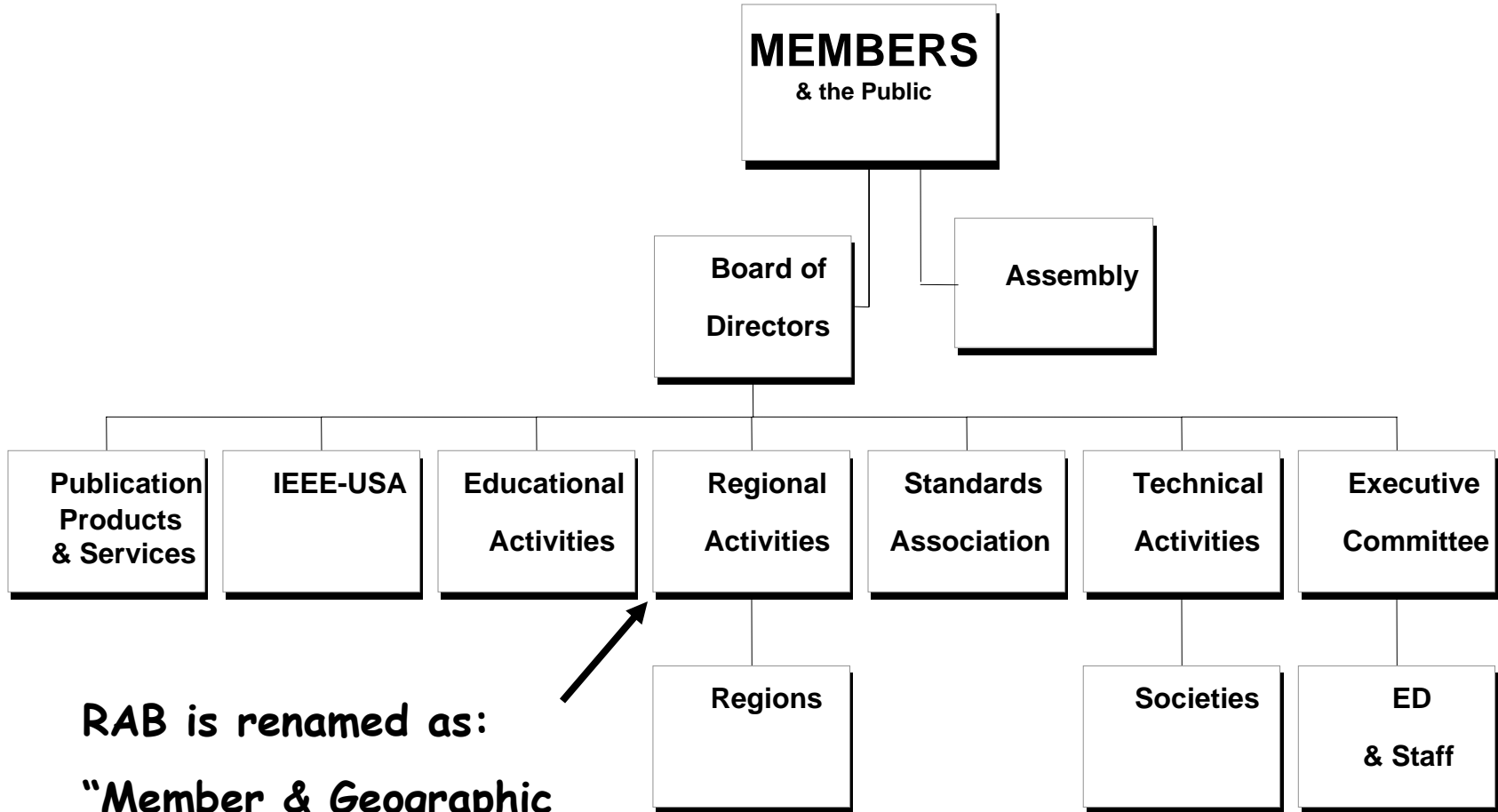


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***IEEE Governance***

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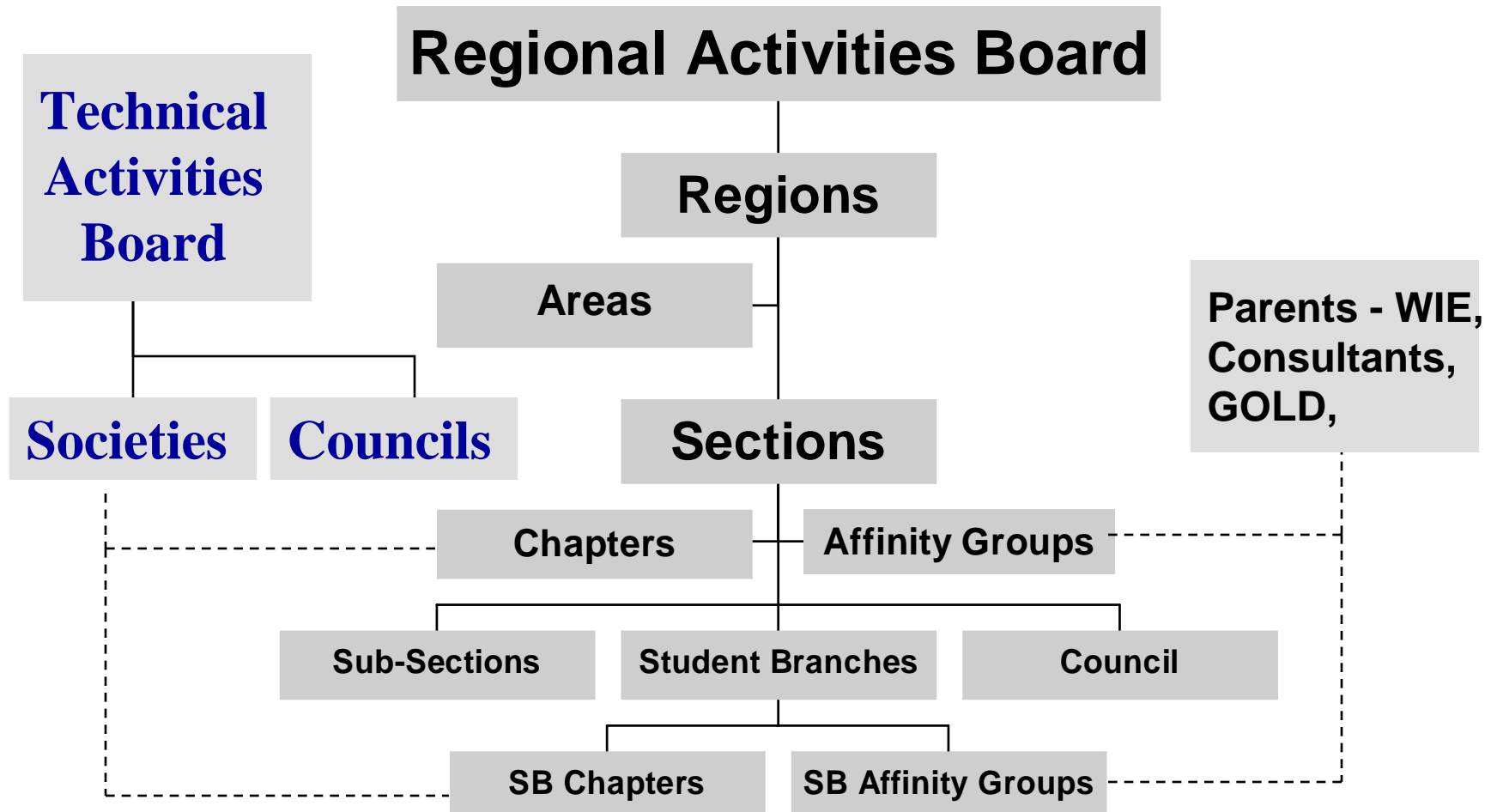
# IEEE Organization



RAB is renamed as:  
"Member & Geographic Activities"

# *IEEE Geographic Unit Organization Relationship to Technical Activities Board*

Now: Member and Geographic Activities





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## ***IEEE Management***

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## ***I'm a Chapter Chair, I . . .***

- ◆ **Preside at Chapter ExCom and other mtgs..**
- ◆ **Work with other Chapter officers to determine program of activities for Chapter**
- ◆ **Represent Chapter at Section ExCom mtgs and Society-sponsored mtgs..**
- ◆ **Familiar with Section governance, policies & procedures, RAB Operations Manual, and any Society requirements for activity**
- ◆ **Submit or insure submission of required reporting to Section**

[http://www.ieee.org/web/geo\\_activities/rab/scs/resources/officer\\_training/index.html](http://www.ieee.org/web/geo_activities/rab/scs/resources/officer_training/index.html)





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## ***IEEE Operations***

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# *Member and Geographic Activities Reporting Structure*

## ◆ VC – Member Activities

- IEEE Membership Development Committee (MDC)
- IEEE Admission and Advancement Committee
- MGA Awards and Recognition Committee
- REP Committee

## ◆ VC – Region, Section & Chapter Activities

- Graduates Of the Last Decade (GOLD) Committee
- MGA Industry Relations Committee
- Section/Chapter Support Committee (MGA/TAB)

## ● VC – Student Activities

- Student Activities Committee
- Potentials Advisory Committee

## ● VC – Strategic Planning

- MGA Strategic Planning Committee
- Transnational Committee

## ● MGA Treasurer

- RAB Finance Committee

## ● Past MGA Chair

- MGA Nominations & Appointments Committee

## ● MGA Chair

- MGA Operating Committee



# ***Region 6 – Communications***

## **◆ IEEE Region 6 Virtual Community**

- A tool for collaboration, requests for participation, and outreach to Areas, Councils, Sections, Chapters and the IEEE community at large in Region 6.
- The Region 6 Virtual Community will be the primary tool for overall communicating within the Region.
- <https://www.ieeecommunities.org/region6>

## **◆ IEEE Region 6 Web Site**

- Webmaster – Scott Tamashiro
- Focus on Region to the public and members not currently engaged as volunteers
- <http://www.ewh.ieee.org/reg/6/>

## **◆ Still trying to get a Region 6 e-Newsletter started**

- <http://www.ewh.ieee.org/reg/6/NewsletterCommu/NewsletterCommunities.htm>

# ***Region 6 Goals***

- ◆ **Ensure value of Membership.**
- ◆ **Be the leader in Membership Direction.**
- ◆ **Be the leader in volunteer development.**
- ◆ **Emphasize delegation using the powers reserved concept**
- ◆ **Be at the forefront of communications:**
  - **between member to member**
  - **member to IEEE**
  - **organizational unit to organizational unit.**
- ◆ **Meet the challenges of a large and transnational organization.**

# ***Seattle Section Goals (report to R6)***

## **◆ Drive Value to the Members:**

- **Reactivate quiet chapters:**
  - ✓ **Recruit new chapter officers**
  - ✓ **Valuable content: free and paid seminars**
- **Attract national/international conferences**
- **Continue career development:**
  - ✓ **PE Refresher**
  - ✓ **Career Fairs**
- **Social/networking events**

## **◆ Cultivate the next generation:**

- **Future Cities & high school mentors for K-12**
- **Student branches & mentors for engineering students**
- **GOLD for young working engineers**

# ***About membership***

- ◆ **IEEE Worldwide grew 0.4% in 2006**
  - **Regions 7-10 rose 2.9%**
    - ✓ **Regions 8 & 9 rose 6.8% and 5.6% respectively**
  - **USA as a whole dropped 1.4%**
  - **Region 6 dropped 1.7%**
  - **Seattle Section actually gained 1%**
- ◆ **Annual turnover is about 20%**
  - **We loose around 18%**
  - **We recruit 20%**
  - **Many reasons cited for non-renewal**
    - ✓ **Obvious reasons: lack of perceived value**



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## ***Financial Management***

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# ***Where does the money come from?***

- ◆ **Section Rebate Program**
- ◆ **Region Assistance**
- ◆ **Society Assistance for Chapters**
- ◆ **Conference Income**
- ◆ **Donations**

# Rebates

*Unit must meet reporting requirements*

## ◆ For **SECTIONS**

- \$2000/Section
- \$3/Member, Student, Associate
- \$1.50/Affiliate
- \$4/Senior Member
- \$500/Subsection
- \$200/Chapter or Affinity Groups
- 10% bonus of rebate for on-time reports
- Unit activity bonus (New)...

## ◆ For **STUDENT BRANCHES**

- Rebate for annual reporting
  - ✓ \$2 per Student Branch member
  - ✓ \$1 per Student Branch Chapter member
- Funds for Branch maintenance provided upon activity plan for current year
  - ✓ <50 members receive \$50
  - ✓ ≥50 members receive \$100

# ***Conference Income***

- ◆ **Sponsorship opportunities with Societies, Sections, other Chapters**
- ◆ **See Technical Activities Conferences web page for more information:**
  - **<http://www.ieee.org/conferences>**

# ***How is the money used?***

- ◆ **IEEE-sponsored activities:**
  - **Chapter and Affinity Group Support**
  - **Newsletters**
  - **Student Branch Support**
  - **Distinguished Lecturers**
  - **Technical, administrative & social meetings**
  - **Recognition supplies (banners, plaques, pins, certificates)**

# ***Seattle Section Budget***

- ◆ **The Seattle Section Budget...**
- ◆ **Your Chapter Society Budget...**



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## ***Required Reporting***

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# ***Required Reporting***

- ◆ All geographic units must report their officers, financial activity, and meeting activity annually to the IEEE Operations Center in Piscataway
- ◆ All activity should be reported through the Section, including Chapters and Affinity Groups
  - 10% bonus if all reporting postmarked no later than end of third week in February
- ◆ Meetings are reported online:
  - <http://www.ewh.ieee.org/r2/dayton/L-31.html>
- ◆ Officer reports are sent to the Section Secretary, reported in turn online
- ◆ Financial forms (L-50) sent to Treasurer
  - [http://www.ieee.org/web/geo\\_activities/units/Required\\_Reporting/line\\_instruc.html](http://www.ieee.org/web/geo_activities/units/Required_Reporting/line_instruc.html)

# ***Section Periodic Reporting***

- ◆ Section & Chapter Officers – At least annually
- ◆ Section written status report
  - **Minimum 3 per year (each Area meeting and Region Operating Committee Meeting)**
  - **Sent to Area Chair with copies to Section Secretary and Region Secretary**
- ◆ Section Executive Committee meeting minutes
  - **After meeting**
  - **Maintained by Section Secretary with copy to Region Secretary**
  - **We post at: [http://www.ieee-seattle.org/excom\\_minutes.html](http://www.ieee-seattle.org/excom_minutes.html)**
- ◆ Section meeting/activity report (L-31)
  - **After activity/meeting (no later than February of following year)**
  - **Consolidated or non-consolidated**
  - **For Region funded PACE projects includes PACE project report plus corresponding L-31**
  - **Maintained by Section Secretary with copy to Region Secretary and Region PACE Chair for IEEE-USA/PACE activities/projects**

## ***Section Periodic Reporting (cont.)***

- ◆ Section award or scholarship winners
  - **Upon selection**
  - **Winners list maintained by Section Secretary (included in next Section status report)**
- ◆ Section budget approved by Section Executive Committee
  - **No Later Than January of budget year**
  - **Maintained by Section Treasurer with copy to RAB**
- ◆ Section financial report (L-50)
  - **February for prior year**
  - **Consolidated or Non-Consolidated**
  - **Maintained by Section Treasurer with copy to MGA**
- ◆ Section financial audit
  - **As required by Section (recommended at least every other year)**
  - **Maintained by Section Treasurer with copy to Region Treasurer**

# ***Meeting Reports***

- ◆ **Responsibility of Secretary**
- ◆ **Business meeting minutes**
- ◆ **Meeting Report Form (L-31)**
  - **Sections - 5 mtgs... (can include Chapter mtgs..., ExCom mtgs..)**
  - **Subsection - 5 mtgs.. (as Section)**
  - **Chapters - 2 technical mtgs..**
  - **Affinity Groups - 2 mtgs..**
  - **Distribute forms to Chapter and Affinity Group Chairs**
  - **Forms to be returned to Secretary**
  - **Submitted all at once as part of the reporting package**

# ***Chapter's Society Required Reporting***

- ◆ **Different for each Society**
- ◆ **Most are tied to funding opportunities**
- ◆ **Send a copy of your L-31 just to be safe!**
- ◆ **Check the Society Chapter Funding Guide for more information**
  - **<http://www.ieee.org/chapters>**

# ***Online Interactive Reporting Features***

- ◆ **Officers and Meeting reports**
- ◆ **Provides a confirmation page**
- ◆ **Chapters should print page and send**
  - **One copy to Section Secretary**
  - **One copy to Societies to comply with reporting/funding requirements**
- ◆ **Plans underway to offer automatic submission to other contacts**
  - **This appears to work now**



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## ***Support for Volunteers***

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# ***Assistance is Available***

## ◆ **IEEE Treasurers' Handbook**

- **<http://www.ieee.org/ra/scs>**
- **Click on “What’s New” (left)**

## ◆ **IEEE Policies**

- **<http://www.ieee.org/policies>**

## ◆ **RAB Operations Manual**

- **Section 9 addresses Region/Section/Chapter activities**

# ***Communications for Section Leaders***

- ◆ SCOOP – monthly newsletter
  - IEEE news for Section Chairs, Newsletter Editors
  - Contents include lots of ‘how to’ articles
  - Distribution list updated from submitted officer reports

**[www.ieee.org/web/geo\\_activities/rab/scs/scoop](http://www.ieee.org/web/geo_activities/rab/scs/scoop)**
  
- ◆ Section/Chapter Support Virtual Community
- ◆ Section Chapter Support web pages
  - Information and forms for Unit officers

**[www.ieee.org/web/geo\\_activities/rab/scs](http://www.ieee.org/web/geo_activities/rab/scs)**

# ***Society Assistance For Chapters***

- ◆ **Each Society has its own program**
  - for example, PES has a High Performing Chapter Grant Program
- ◆ **Refer to Society Chapter Funding Guide for more information**
  - <http://www.ieee.org/chapters>

# ***Entity Web Hosting (EWH)***

- ◆ **Host your unit's web page on the IEEE server free of charge**
- ◆ **10 MB space allowed per unit**
- ◆ **Templates available for use**  
**<http://ewh.ieee.org/>**

# ***Majordomo? Major who?***

## ◆ **eNotice is new (and preferred)**

- They build and maintain the email list automatically.
- <http://www.ieee.org/organizations/vols/e-notice/>
- We send the Seattle Section Datalink with eNotice.

## ◆ **Email distribution lists**

- Established and hosted through IEEE Operations Center
- Maintained by the local unit
- Careful about who can “post” to the list
- Spam, spam, spam, spam, spam, spam
- Only recommended for small groups like the Seattle ExCom, a manageable number of people.

# ***IEEE Email Aliases***

- ◆ **One email address . . . no matter how many times you change jobs or ISPs!**
- ◆ **Virus-checking on all attachments**
  - Attachment deleted if virus detected
  - Notification sent to recipient & sender
- ◆ **Each member must have an email address set up in order to get eNotice services, like the Datalink.**

<http://eleccomm.ieee.org/personal-aliases.shtml>



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## ***Value for Members***

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# Career & Educational Activities

## *Enabling Careers through Life-long Learning*

- ◆ Continuing education programs organized by Sections can be tailored for local membership needs.
- ◆ These activities are most important, since they are planned by members & cater directly to member needs.
- ◆ *Section Education Chair's Guide to Planning Successful Educational Programs* provides guidelines for organizing continuing education activities.

**<http://www.ieee.org/organizations/eab/>**

- Here in the Seattle Section, we don't have an Education Chair
  - We do organize a PE Refresher Course every year

# ***IEEE.TV***

- ◆ **Internet-delivered video**
- ◆ **Member-only technical content**
  - **Example: “Stuff you don’t learn in engineering school”**
- ◆ **Public-access technical content**
  - **Example: “Recycling: computers & electronics”**

**[www.ieee.org/web/membership/IEEEtv/about.html](http://www.ieee.org/web/membership/IEEEtv/about.html)**

# ***Member Qualifications***

- ◆ **Presidential Ad Hoc Committee recommended changes to Bylaws for Member Qualifications and REP List to broaden the criteria for achieving Member grade.**
- ◆ **Changes were approved by BoD in November 2002 and implemented in 2003.**
- ◆ **Result has been a significant impact on Associate/Member grade assignments.**

## ***Three ways to become an IEEE Member***

	<b>Institution providing BS degree (or higher)</b>	<b>Field</b>	<b>Work experience in IEEE-designated fields of interest</b>
<b>1</b>	<b>On REP list</b>	<b>IEEE-designated</b>	<b>N/A</b>
<b>2</b>	<b>Not on REP list</b>	<b>N/A</b>	<b>3 years</b>
<b>3</b>	<b>No degree</b>	<b>N/A</b>	<b>6 years of “important” work</b>

# ***Member Upgrades***

- ◆ **Associate to Member Upgrade by Section Chair**  
**<http://www.ieee.org/portal/pages/membership/upgrade.html>**
- ◆ **IEEE Senior Member Program**  
**<http://www.ieee.org/web/membership/senior-members/guide.html>**
- ◆ **IEEE Fellow Program**  
**<http://www.ieee.org/about/awards/fellows/fellows.htm>**

# ***Fellows / Senior Members***

- ◆ **Fellows elected by IEEE BoD**
- ◆ **List available on the web**  
<http://www.ieee.org/awards>  
(scroll down to “Fellows Program”)
- ◆ **Senior Member elevations can be identified through SAMleee**

# IEEE Awards & Recognition

Peer recognition to individuals whose contributions to the art and science of electro- and information technologies world-wide have improved the quality of daily life

- ◆ Medal of Honor/IEEE Medals
- ◆ IEEE Fellows
- ◆ Technical Field Awards
- ◆ Honorary Membership
- ◆ Service Awards
- ◆ Corporate Recognition
- ◆ Prize Paper Awards
- ◆ Society & Conference Awards
- ◆ Public Service & Professional Recognition
- ◆ Geographic Unit Awards

*<http://www.ieee.org/about/awards/>*



# ***MGA Awards***

- ◆ **Achievement Award**
- ◆ **Innovation Award**
- ◆ **Leadership Award**
- ◆ **Larry K. Wilson Transnational Award**
- ◆ **William W. Middleton Distinguished Service Award**
  - **Awarded once every three years, at Sections Congress**
- ◆ **Friend of Regional Activities**
  - **Nomination can be submitted at any time.**
- ◆ **All other RAB awards**
  - **Deadline for nominations - 15 October**
  - **More info? [mga-awards@ieee.org](mailto:mga-awards@ieee.org)**

# ***Region 6 Awards***

- ◆ **Awarded at the Area Level with Area Winners Competing for the Region awards**
  - **Outstanding Engineer**
  - **Outstanding Service**
  - **Outstanding Corporate Engineering Community Service**
  - **Outstanding Section**
  - **Outstanding Student Branch**
- ◆ **Nominations: go through NW Area first**
- ◆ **Director's Special Award (up to 4 per year)**

# Resources for Officers

- ◆ Electronic Communications
- ◆ Financial Resources
- ◆ Helpful web links
- ◆ New Officer Info
- ◆ Newsletters
- ◆ Officer Training
- ◆ Publications, Guides, Handbooks
- ◆ Reference Material
- ◆ IEEE Governance Documents
- ◆ IEEE Volunteer Resources
- ◆ Section/Chapter Support Home Page
- ◆ [http://www.ieee.org/web/geo\\_activities/units/Resources/Officer\\_Training/index.html](http://www.ieee.org/web/geo_activities/units/Resources/Officer_Training/index.html)
  - This list of resources was created specifically with IEEE volunteer leadership in mind. Officers seeking information at a glance should check the links in the left-hand menu first. If you have suggestions for additional links, please let us know.
- ◆ Contact Information  
[sec-chap-support@ieee.org](mailto:sec-chap-support@ieee.org)



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## ***Technical Activities***

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# ***Leading a local IEEE affinity group***

- ◆ **A local chapter is a technical club**
  - **Members learn first hand from speakers**
    - ✓ **Homegrown**
    - ✓ **Visitors, e.g. Distinguished Lecturers**
  - **Members can share new information with their colleagues**
  - **Members can network with each other**
- ◆ **The main role of the leadership is to organize meetings and other activities of value to their members**

# ***Meeting Topics***

- ◆ **Meetings can be technical or business**
  - E.g. tutorial on some new technology
  - E.g. consultant business practices
- ◆ **Factors that drive topic choices**
  - Expressed interest from local membership
  - Available local speakers
  - Available visiting speakers
- ◆ **Meetings can be free or for a fee**
  - Most chapter meetings are free attendance, covered by the annual budget
  - Special training (e.g. workshops) may charge, to cover space & speaker expenses

# *Recruiting Speakers*

- ◆ **Use technical meetings to conduct membership business, too**
  - Ask for suggestions on topics and speakers
- ◆ **Locate the local industry leaders**
  - If they are not already members, encourage them to join IEEE and your tech society
- ◆ **Make sure you are registered with the national and international societies**
  - so that they will find you when they organize Distinguished Lecture Tours.
- ◆ **Track organizations of interest, so that you can recruit speakers if they are having meetings in the area.**
- ◆ **If you can't find speakers, create some**

# ***Study Groups***

- ◆ **Chose a topic**
- ◆ **Identify a small team**
  - **At least one of them should have presentation skills**
- ◆ **Research the topic to generate a 60-90 minute presentation**
  - **Allow 2-3 months**
- ◆ **Winners: the chapter gets a presentation**
- ◆ **Winners: the presenters gain more command of the topic**

# *Meeting Space*

- ◆ **Meeting space is a limiting factor**
  - our budgets can't support renting space, unless we charge for attendance
- ◆ **The best resources are local companies and colleges**
  - Some local organizations may provide it, justified by the benefit to their own engineers or students (e.g. Arrow Electronics, Honeywell, Microsoft, UW)
  - Modern security concerns have restricted this
- ◆ **Successful chapters get space booked for regular use**

# ***Meeting Publicity***

- ◆ **If your membership is not informed, they won't show up.**
- ◆ **We have our own web site**
  - **[www.ieee-seattle.org](http://www.ieee-seattle.org)**
  - **Some groups have their own web sites.**
- ◆ **We publish an electronic Datalink via eNotice**
  - **We stopped using [seattle-section@ieee.org](mailto:seattle-section@ieee.org)**
- ◆ **Some groups have their own email lists**
  - **They can also use e-Notice.**
- ◆ **Some local organizations allow publicity to their employees or students (e.g. MicroNews)**

# ***Meeting Conduct***

- ◆ **Most meetings are free attendance.**
- ◆ **Food & beverages are popular if budget allows, because members may come directly from work.**
- ◆ **We take attendance, so that we can report to the IEEE (L-31 forms)**
- ◆ **We collect contact information on attendance, for contacting membership**
- ◆ **Our meetings are public.**
  - **We don't require NDA for attendance**
- ◆ **Clean up afterwards, so we may use the rooms again.**

# ***Workshops***

- ◆ **A local chapter may take bigger subjects**
  - takes more than 90 minutes
  - Valuable enough to justify attendance fee
    - ✓ Paid speakers or instructors
    - ✓ Rented public space
- ◆ **Example: Wireless 2002 workshop**
  - All day on a Saturday at the Bellevue Hyatt
  - 6 speakers, some local & some remote
  - Charged ~\$125/attendee
  - Net proceeds exceeded \$10,000
  - Meeting organization shared by 4 societies



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## ***Questions & Lessons Learned ?***

**Sharing ideas to have a more effective Section that serves the members needs and contributes to the community.**