Sections Congress 2020 Recommendations Final Update

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Chair, IEEE MGA Ad Hoc Committee on Sections Congress 2020 Top 3 Recommendations Implementation
MGA Board June 17, 2023
Sections Congress 2020 Recommendations

Provide a high value Continuing Education program for working professionals

- Three IEEE Academies (including 5 learning paths) created
- IEEE Academies Marketing efforts launched in June 2022
- Launched 50% discount program off member course price for 3 courses/year in May 2023

Improved resources for sections to serve industry professionals and track industry contacts at the local level

- The IEEE Industry Relations Platform (IRP) development, user guides and training resources are completed
- Survey completed and efforts to create a catalog of industry related training underway

Consideration of a multi-year membership commitment

- Continuing to run existing pilot testing 3 and 5-year graduated dues, as well as 5-year flat discounted dues for recent graduates
- Relaunched duplicate pilot using a new cohort of recent graduates to obtain post-pandemic results and learning
- Launched effort to promote 3 and 5-year pre-paid memberships to HG members renewing for the first time
Actions and Progress
Recommendation: Provide continuing education to provide true value added for working professionals

<table>
<thead>
<tr>
<th>Present short courses on emerging technical topics including a documented certification, including professional development hours.</th>
<th>To increase member retention, offer 3 courses per year to each member.</th>
<th>Develop online presentations similar to TED talks on emerging topics.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Launched 3 IEEE Academies including 5 paths developed through Educational and Technical Activities partnership</td>
<td>Launched to members May 2023</td>
<td>MGA and IEEE.tv have evaluated the scope of the recommendation, developed a funding proposal and project plan. Ultimately, it was determined this recommendation is not able to be implemented due to current staff capacity and production commitments</td>
</tr>
</tbody>
</table>
| 1. IEEE Academy on Artificial Intelligence:  
   • Modern AI – Machine/Deep Learning | Marketing efforts currently underway | |
| 2. IEEE Academy on Internet of Things:  
   • Communication Standards  
   • Computing Platforms | All members will now have access to select up to 3 courses, per membership year, within the e-learning library and will receive a 50% discount off the already reduced member price | |
| 3. IEEE Academy on Smart Grid:  
   • Distribution Automation  
   • Smart Grid: Microgrid | | |
| Marketing effort launched in June 2022 | | |

The EA/TA Joint AdHoc on Continuing Education are continuing to evaluate usage and satisfaction metrics and determining next steps
**Recommendation:**
Improved resources for sections to serve industry professionals and track industry contacts at the local level

<table>
<thead>
<tr>
<th>Identify a tracking tool to monitor local industry engagements and to provide a continuity of contacts through section level leadership changes.</th>
<th>Identify industry-relevant content, structures and processes existing across IEEE.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The IEEE Industry Relations Platform (IRP) is now available for Section use with full functionality as defined within the Recommendation. IRP development of back-end infrastructure, including integration with IEEE IT infrastructure (hosting on AWS, IEEE single-sign on, and OU officer data) is fully completed.</td>
<td></td>
</tr>
<tr>
<td>• Initial Industry relevant content inventory survey completed; the Industry Inventory group has reviewed the current inventory and identified gaps. Further analyzation of the results to identify additional gaps and overlaps, as well as opportunities to present information is required.</td>
<td></td>
</tr>
<tr>
<td>• A video user guide and a user guide document are now available. Soft pilot launch of the IRP was completed. Overall, more than 100 volunteers from the Sri Lanka Section and Region 3 have piloted the current version of the IRP and have found the tool to meet their needs. Further, Section leaders from nearly every IEEE Region have now utilized the tool and provided overall positive feedback.</td>
<td></td>
</tr>
<tr>
<td>• The Geo-Strategy Working Group has created an industry-focused overview slide deck and online/physical brochure containing IEEE’s industry relevant products and services and their benefits to industry professionals.</td>
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<tr>
<td>• Further evaluation to expand functionality within the tool beyond Sections basic needs is required. Expansion requires the transfer of the IRP to an open-source version, based on Odoo, an open-source marketing and relationship manager tool similar to Salesforce.</td>
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<tr>
<td>‾ Moving to an open-source platform would require additional funding, and requirements to be written.</td>
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<td>• Industry ambassadors have been established in R9 and the Region has created usable documents on Structure and Best Practices.</td>
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<tr>
<td>• Efforts working with IEEE MSD will continue on global roll-out and communications with volunteers, including webinars.</td>
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</table>
Recommendation: Consideration of a multi-year membership commitment

Reviewing the new trio of multi-year membership pilots for Recent Grads

Recent Grad 3 and 5-year discounted dues pilot

- Due to the pandemic, results of the original recent grad pilot were unreliable. Therefore, for the 2023 membership year, MGA launched a new pilot to students who graduated in 2021 and renewed for the reduced dues higher grade membership in 2022. The pilot segments as outlined are:
  - 3-year stepping-stone discounts: 50%, 25%, then full dues
  - 5-year stepping-stone discounts: 50%, 25%, 20%, 15%, then full dues
  - 5-year flat discount of 50%, 50%, 50%, 50%, then full dues
  - Control (Bylaw 108.7): 50%, then full dues

- Year-to-date results (through April 2023) show increased retention with discounted offers, but with a revenue “cost”

<table>
<thead>
<tr>
<th>Segment</th>
<th>Discount Amount Offered</th>
<th>Test Cell Size</th>
<th>Renewal Count</th>
<th>Renewal Rate</th>
<th>Dues Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Control (Bylaw)</td>
<td>0%</td>
<td>706</td>
<td>389</td>
<td>55.1%</td>
<td>$60.7k</td>
</tr>
<tr>
<td>3-Year Stepped</td>
<td>25%</td>
<td>706</td>
<td>406</td>
<td>57.5%</td>
<td>$56.0k</td>
</tr>
<tr>
<td>5-Year Stepped</td>
<td>25%</td>
<td>706</td>
<td>406</td>
<td>57.5%</td>
<td>$55.7k</td>
</tr>
<tr>
<td>5-Year Flat</td>
<td>50%</td>
<td>706</td>
<td>447</td>
<td>63.3%</td>
<td>$54.4k</td>
</tr>
</tbody>
</table>

- Although the discounted offers generate higher retention, overall dues revenue is lower than the non-discount Control segment
- This pilot is scheduled to run through the end of the 2025 membership year
Recommendation:
Consideration of a multi-year membership commitment

Reviewing the multi-year prepaid membership offer

Testing of multi-year pre-paid membership offers

► Targeted 4,912 first-year renewing HG members in the US and Canada that have no Society membership
  ► Choice of a 1-year membership at regular dues, a 3-year membership at a 10% discount, or a 5-year membership at a 20% discount
► Through April 2023, 1,519 total renewals (31% retention rate)

<table>
<thead>
<tr>
<th>Offer Taken</th>
<th>Renewal Count</th>
<th>Discount Redemption Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Year, no discount</td>
<td>1,465</td>
<td>n/a</td>
</tr>
<tr>
<td>3 Year, 10% discount</td>
<td>19</td>
<td>1.3%</td>
</tr>
<tr>
<td>5 Year, 20% discount</td>
<td>35</td>
<td>2.3%</td>
</tr>
<tr>
<td>Totals</td>
<td>1,519</td>
<td>3.6%</td>
</tr>
</tbody>
</table>

► Initial results indicate that members are not interested enough in multi-year memberships to make a positive impact on overall retention.
► Next steps for 2024: short survey to these members to understand their motives (e.g., employer paid, appealing discount, commitment to IEEE/volunteer, etc.); continue the pilot another year.
Final Outcomes
Recommendation:
Provide continuing education to provide true value added for working professionals

Overall summary, final observations and recommendations forward:

- **“Courses on emerging technical topics”** 3 IEEE Academy including 5 learning paths have been developed as a joint effort between EA and TA. These have been deployed and members have enrolled. Certificates available at the completion of each Academy. User experience and uptake data being collected. These will drive recommendation regarding further academies’ development.

- **“Three courses per member”** Functionality was launched in May 2023. All members now have access to select up to 3 courses, per membership year, within the e-learning library and will receive a 50% discount off the already reduced member price. [https://www.ieee.org/education/mud.html](https://www.ieee.org/education/mud.html)

- **“Ted Style Talks”** The COVID pandemic led to numerous IEEE groups offering many more free webinars to members and the public. Regarding specific TED style talks, due to staff capacity and production commitments, IEEE.tv needed to withdraw its NIC proposal for “TED Style Talks”. The scope and size of the proposal would’ve compromised client relationships and the quality of tv’s core production deliverables across the organization.
Recommendation:
Improved resources for sections to serve industry professionals and track industry contacts at the local level

- Overall summary
  - Industry Relations Platform: While it was originally challenging to get significant numbers of users of the IRP, the pilot results indicate that those that have used the platform see value in it and that it has met the needs of Section volunteers. Transferring it to an open-source platform will make it easier to continue to maintain and expand the tool beyond basic functionality.
  - Industry Inventory: The inventory suggests that there are a number of scattered resources focused on industry, but there are still significant gaps in what companies and industry professionals are looking for. The Industry Ambassadors program will continue to help communicate what industry-related products and services are available, as well as gather information on needs.

- Final observations and recommendations forward
  - Industry Relations Platform is now available for Section use
    - A guideline document is also available.
  - Will continue to collect data on industry activities to promote useful tools, products, and services, as well as to help identify additional gaps.
  - Broaden the Industry Ambassadors program to other regions and potentially other OUS (e.g., societies)
Recommendation:
Consideration of a multi-year membership commitment

- Results from the original pilot were affected by the pandemic, therefore while we continue to run the existing pilot testing 3 and 5-year graduated /stepped dues, as well as 5-year flat discounted dues for recent graduates, the 2021 Ad Hoc on Membership Dues recommended a duplicate pilot.

- Launched duplicate pilot using a new cohort of recent graduates to obtain post-pandemic results and learning.
  - Began pilot with the 2023 membership year, using a new cohort of students who graduated in 2021.
  - First read of initial results indicate that increased discounts have a positive effect on retention numbers, but with revenue per member and overall ROI declines.

- Successfully launched effort to promote 3 and 5-year pre-paid memberships to an at-risk segment of HG members renewing for the first time.
  - First read of initial results indicate low response for the offers and no improvement to overall retention.

- Each of these pilots will continue into 2024 and beyond to obtain deeper learning and yield better decisions.
Thank You