MEMBERSHIP DEVELOPMENT

2020 MANUAL

Questions and suggestions to: grow-membership@ieee.org This document has been developed as a resource for IEEE Volunteers and Staff, and is not intended for general circulation with promotional materials.
# Table of Contents

- **Introduction**
  - Volunteering for IEEE .................................................. 2

- **IEEE Membership Development** ........................................ 2
  - Strategy and Planning .................................................. 3
  - Region & Section Membership Development ......................... 3
  - Society Membership Development ..................................... 4
  - Membership Development Organization Chart ...................... 5
  - The Role of the Membership Development Chair .................. 6

- **IEEE Membership Development Details** ................................. 7
  - Membership Development Cycle ...................................... 7
  - IEEE Membership Development Activities Month by Month ....... 8

- **Resources and Tools** .................................................... 12
  - Getting Started Checklist ............................................. 12
  - Resources ................................................................. 13
  - Membership Development Planning ................................... 14
  - Developing your Membership Team .................................... 19

- **IEEE Membership Development Activities** ............................... 20
  - First Year New Member Experience .................................. 20
  - Senior Member Elevation Events ..................................... 21
  - IEEE Fellow Program .................................................. 21
  - Additional IEEE Memberships ......................................... 21
  - IEEE Member Benefits ................................................ 22

- **Extra Help** ..................................................................... 24
  - Responding to Membership Objections ............................... 24
  - IEEE Contact & Support Center ...................................... 25
Volunteering for IEEE

Whether you are a Region MD Officer, a Section MD Officer or a Society MD Officer, this Manual can be adapted to your needs providing an essential overview to make your job easier. Rest assured you are not alone in this endeavor. IEEE has developed a dynamic support network to enable your success, combining a Volunteer and Staff partnership unparalleled in any professional association.

Your dedication and commitment will help ensure a vibrant professional association that evolves to meet the present and future needs of technology professionals worldwide. As you may be aware, IEEE does not have a professional sales force to promote membership. Rather, our sales force consists of our more than 400,000 members worldwide. Think of the possibilities of that! And it is volunteer leaders such as you that can help to direct and harness this tremendous asset.

Recruiting individuals to become IEEE members begins with communicating your own personal experience with IEEE. Just as important, recruiting new IEEE members requires active listening and understanding the needs of other individuals — the value of IEEE membership may translate differently for you than to another. When you ask an individual to join IEEE, or retain their membership, do so with the understanding that this individual may or may not already have a perception of IEEE and its benefits. Moreover, we are encouraging individuals to belong to a professional association in an era when information access and networking is desktop-accessible.

Most likely, you have chosen a profession that has little to do with membership recruitment or retention, and participating in a “sales” function may not come easy. However, truth be known, we’re all salespeople — whether it’s recommending a mechanic, a brand of wireless routers, or a colleague for employment. According to one definition, “selling” is to persuade (another) to recognize the worth or desirability of something. When you look around and notice how your organization, workplace or relationships have improved because you communicated your great ideas and made contributions, was “selling” really such a bad thing? To be successful with membership development, we will need to be diligent in both raising awareness and asking individuals to join IEEE.

IEEE Membership Development

Membership Development is a function of recruiting new members as well as retaining existing members. This is accomplished by ensuring your members are receiving the “value” they expect from being an IEEE member. “Value” can have many different meanings, as our membership encompasses a vast array of technical disciplines, nationalities, and most importantly, unique personalities.

To best deliver the “value” members expect, each section has to understand what their members are interested in and then attempt to deliver on those interests whether it be simply directing the member to the Benefits Finder or working with members on projects like STEM, community involvement etc. As you can imagine, “Membership Development” is so much more than recruiting members. It is an investment to cultivate the individual member by providing a world class experience that makes engineers WANT to be involved with IEEE.
Strategy and Planning

IEEE’s strategic and long-range plan is grounded in core values, describes a desired vision, and what will be essential to achieving this vision. IEEE’s commitments are articulated in goals that declare the outcomes the organization intends to achieve. Underlying this plan is the adoption of an ongoing process of planning and thinking strategically, designed to ensure relevance of direction and action over time. The IEEE Strategy and Plan are developed by IEEE volunteers on various committees.

Learn more >> [ieee.org/about/ieee-strategic-plan.html](http://ieee.org/about/ieee-strategic-plan.html)

Following IEEE’s strategic plan, developing a membership strategy and plan for a Region, Section or Society benefits the organizational unit and its volunteers, officers and general members. Once Regions, Sections or Societies have begun developing their membership strategy, they should encourage their units to develop goals and action plans tied to their Region and/or Society and the IEEE goals. Utilize the MD Calendar to review the scheduled activities to plan and allocate volunteer time to participate. Volunteer time, participation and the organization’s budget should be included in the strategy development.

Region & Section Membership Development

Members of IEEE automatically become members of their local IEEE area, known as a Section, allowing them to share technical, professional and personal interests with others in IEEE’s worldwide member community. IEEE is divided into ten global geographic regions:

- IEEE Region 1 – Northeast United States
- IEEE Region 2 – Eastern United States
- IEEE Region 3 – Southeastern United States
- IEEE Region 4 – Central United States
- IEEE Region 5 – Southwestern United States
- IEEE Region 6 – Western United States
- IEEE Region 7 – Canada
- IEEE Region 8 – Europe, Middle East, Africa
- IEEE Region 9 – Latin America
- IEEE Region 10 – Asia & Pacific

Each IEEE Region has a Membership Development Chair. Responsibilities of the Region Chairs include coordinating activities between IEEE Operations Center and the Sections, as well as facilitating Region-wide membership development initiatives involving many Sections. It is imperative that every IEEE Section has a membership development officer with whom the Region Chair can make contact and support.

Within these regions are 334 local Sections, 2,231 technical Chapters, 2,669 student branches at colleges and universities in 80 countries, 922 student branch chapters at colleges and universities and 440 affinity groups that unite local members with similar interests.

The names and contact information for all MD officers should be reported annually to IEEE as part of the Officer Confirmation Report:

View report >> [officers.vtools.ieee.org](http://officers.vtools.ieee.org)
Society Membership Development

Society membership development is coordinated by each Society, and implemented through many channels, including direct mail, conferences, and chapter activities.

A Chapter is the technical subunit of one or more IEEE sections, and has both the Section and an IEEE Society as a parent. Chapters are your local link to the valuable resources available from IEEE and its 39 technical societies. Chapter activities may include guest speakers, workshops, and seminars as well as social functions. They provide society members with valuable opportunities to network at a local level – enabling both personal and professional growth.

Directory of IEEE Societies >> ieee.org/societies
Membership Development Organization Chart

The Membership Recruitment and Recovery (MRR) Committee is a standing committee of the IEEE Member and Geographic Activities Board. The MRR Committee is charged with creating, promoting, and monitoring appropriate and effective membership development programs to increase IEEE membership. Specifically, the Committee is responsible for:

- Building and expanding a worldwide team of IEEE volunteers to advance MR&R objectives.
- Providing training and guidance to participating volunteers.
- Developing and promoting best-practices, and ensuring awareness of, and access to, forums and tools.
- Mentoring volunteers on how to develop and optimize their MR&R activities in alignment with the IEEE membership calendar.
- Setting goals for yearly IEEE membership increases in membership recruitment and recovery.
- Providing recommendations for new or improved benefits.
- Provide support to all committees that are involved with recruitment and recovery.
- Incorporate the MGA Vision Mission and Values and Principles in the performance of the MR&R functions and activities.
- Collaborating with the MGA MECC Committee and IEEE Staff to develop and execute membership marketing and sales plans, forums and tools, and benefit education campaigns.

The MRR Committee shall implement these responsibilities by emphasizing the value and benefits of IEEE and Society membership, involving all IEEE organizational units and staff in coordinated membership development activities, encouraging, motivating and recognizing volunteerism and ensuring that the needs and concerns of membership development are identified and understood.
The Role of the Membership Development Chair

It is in your Section’s best interest to ensure someone has been appointed to the Membership Development Chair (MD Chair) Role. The role itself is to shepherd the activities pertaining to membership recruitment and retention in order to deliver an excellent member experience. This person will work closely with their Section Chair, Sub-Committees within their Section and IEEE Membership Development staff to design and execute a membership plan for a given year.

The keys to this role include:

- Finding a “champion” who is interested in networking/relationship building with people both within IEEE and externally
- Having a passion for:
  o Serving the members by understanding what they want/need
  o Partnering with the various committees within their Section to deliver a better member experience
  o Getting people involved in both short-term and long-term engagement within the Section
- Understanding that there are a number development/engagement opportunities already available in their Section that should be utilized including:
  o Events/Conferences
  o Sub-Committee activities/meetings

HELPFUL TIP: If you are having difficulties identifying a volunteer, try reaching out to members whose employment requires them to be socially interactive with other engineers (i.e. consultants, managers, etc.. If this does not work, contact Membership Development staff for additional help.

For Membership Development Training, please refer to:

The Membership Development Portal >> ieee.org/md
The IEEE Center for Leadership Excellence >> ieee-elearning.org/
IEEE Membership Development Cycle

**Membership Year Concludes**

**Membership Year Begins**
Renewal opens for following year. Full-year dues cycle begins.

**Membership Mid-Year**
Arrears-recovery begins. Half-year dues cycle begins.

**Service Deactivation**
Past-due members placed into arrears.

**Calendar Year Concludes**
Calendar year-end membership statistics determined.

**Join 1 March to 15 August**
Receive half off dues (new members only)

**Join September to December**
Get member benefits and following year!
Membership Development Activities Month by Month

The calendar below outlines the significant programs and processes that IEEE headquarters facilitates during the year. With knowledge of the IEEE membership development calendar, you can begin planning and synchronizing membership development activities regionally and locally.

<table>
<thead>
<tr>
<th>MONTH</th>
<th>RECRUITMENT</th>
<th>RETENTION</th>
<th>RECOVERY</th>
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<tbody>
<tr>
<td>August</td>
<td><strong>Recruitment Kick-Off</strong> – Volunteers who are responsible for membership need to order materials for the new membership year via the MD materials order form at: <a href="http://www.ieee.org/md">www.ieee.org/md</a></td>
<td><strong>Senior Member Upgrade</strong> – Grade elevation increases likelihood of member renewal. Begin planning an event for nominating individuals to Senior Member grade.</td>
<td><strong>Second elevation</strong> of students with a reported graduation date between July and December. Process takes place at end of August. Students elevated for renewal, grade changed at end of the month in which the indicated graduation date occurs. Opportunity to touch those graduating students within your Section.</td>
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<td></td>
<td><strong>Conferences &amp; Section Meetings:</strong> Opportunities to disseminate membership brochures at conferences, Section meetings and local events.</td>
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<td></td>
<td><strong>Need materials for your conference?</strong> Request resources via the Conference Support and Promotion Request form at: <a href="http://www.ieee.org/cmr">www.ieee.org/cmr</a></td>
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<td></td>
<td><strong>IEEE Day events</strong> are great for recruitment and retention. Start planning a technical, professional or celebratory event with the Section and society to engage members and non-members. IEEE Day is the first Tuesday in October. Events can be planned anytime during that week.</td>
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<tr>
<td></td>
<td><strong>Senior Member Upgrade</strong> – Grade elevation increases likelihood of member renewal. Begin planning an event for nominating individuals to Senior Member grade.</td>
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<td><strong>Second elevation</strong> of students with a reported graduation date between July and December. Process takes place at end of August. Students elevated for renewal, grade changed at end of the month in which the indicated graduation date occurs. Opportunity to touch those graduating students within your Section.</td>
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<td></td>
<td><strong>New member outreach</strong> - Volunteers should connect with new members in their area. A list can be pulled in OU Analytics.</td>
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<td></td>
<td><strong>Life Member Elevation:</strong> Data is pulled in August for eligibility. Actual elevation effective January of new calendar year</td>
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<td>September</td>
<td><strong>MD Officer</strong> – Discard outdated membership materials. Order new membership materials for use at events and conferences via the MD materials order form at: <a href="http://www.ieee.org/md">www.ieee.org/md</a></td>
<td><strong>New Membership Year Begins</strong> – Online renewal opens for next membership year.</td>
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<td>**New members begin receiving acknowledgment pack/ welcome kit for subsequent year. Individuals who join IEEE in September get 16 months of membership for the price of 12. Incorporate message into outreach.</td>
<td><strong>Fellow Evaluation:</strong> The Fellow Committee ends their review of Fellow nominations on 1 September</td>
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<td><strong>Student Competition</strong> – Registration opens for IEEEXtreme, 24 hour online programming challenge for IEEE Student members.</td>
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<td><strong>Members are notified about Member-Get-a-Member (MGM) awards via email.</strong></td>
<td><strong>Contest idea:</strong> Senior Member Elevation Grade elevation increases likelihood of member renewal. Host a contest for nominating individuals to Senior Member grade.</td>
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<td><strong>New member outreach</strong> - Volunteers should connect with new members in their area. A list can be pulled in OU Analytics.</td>
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<td>MONTH</td>
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</table>
| October      | • **Conferences & Section Meetings:** Identify opportunities to disseminate membership brochures at conferences, Section meetings and local events.  
                   • Organize Membership Recruitment at Universities and Companies  
                   • Individuals who join IEEE in October get **14 months** of membership for the price of 12. Incorporate message into outreach.  
                   • Host your IEEE Day event the first week of October. | • **Membership Renewal – 1st Notice:** IEEE HQ mails first paper notice to higher grade and life members as well as sends email renewal reminder. Students and e-members receive an email renewal reminder. All include incentive to renew before 15 November.  
                   • **Local MD Officers** – Develop a communication plan directed toward members who have not renewed their membership. Messaging should include contact info and a list of upcoming events with a link to renew  
                   • **New member outreach** - Volunteers should connect with new members in their area. A list can be pulled in OU Analytics. | • **Extended Arrears Recovery** – IEEE HQ coordinates recovery of memberships, 18 months lapsed. Asked to reinstate for the following year. |
| November     | • **Conferences & Section Meetings:** Identify opportunities to disseminate membership brochures at conferences, Section meetings and local events.  
                   • Organize Membership Recruitment at Universities and Companies  
                   • Individuals who join IEEE in November get **14 months** of membership for the price of 12. Incorporate message into your outreach. | • **Membership Renewal – 2nd Notice** – IEEE HQ sends email renewal reminder to non-renewed HG members.  
                   • **Local MD Officers** – Check the list of Non-renewing members in OU Analytics. Contact these members asking them to renew, paying special attention to first year members.  
                   • **New member outreach** - Volunteers should connect with new members in their area. A list can be pulled in OU Analytics. | • **Local Renewal Outreach** – Augment HQ efforts in a preemptive attempt to reduce members in arrears. |
| December     | • **Conferences & Section Meetings** Identify opportunities to disseminate membership brochures at conferences, Section meetings and local events.  
                   • Organize Membership Recruitment at Universities and Companies. | • **Local MD Officers** – Check the list of Non-renewing members in OU Analytics. Contact these members asking them to renew, paying special attention to first year members.  
                   • **New member outreach** - Volunteers should connect with new members in their area. A list can be pulled in OU Analytics. | • **Senior Member Meeting dates posted to the web** |
| January      | • **Conferences & Section Meetings** Identify opportunities to disseminate membership brochures at conferences, Section meetings and local events.  
                   • **Need materials for your conference?** Request resources via the Conference Support and Promotion Request form at: www.ieee.org/cmr  
                   • Organize Membership Recruitment at Universities and Companies. | • **Membership Renewal – 3rd Notice** – HQ mails print notification to non-renewed members informing them their IEEE membership is overdue.  
                   • **Region MD Officer** – Plan local Pre-Arrears retention efforts. Consider an outreach prior to 1 March, when non-paying members go into arrears. Work with your Sections.  
                   • **Local MD Officers** – Check the list of Non-renewing members in OU Analytics. Contact these members asking them to renew, paying special attention to first year members.  
                   • **New member outreach** – Volunteers should connect with new members in their area. A list can be pulled in OU Analytics. | • **Senior Member Meeting dates posted to the web** |
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</table>
| February   | • Conferences & Section Meetings  
Identify opportunities to disseminate membership brochures at conferences, Section meetings and local events.  
• Need materials for your conference? Request resources via the Conference Support and Promotion Request form at: www.ieee.org/cmr  
• Organize Membership Recruitment at Universities and Companies. | • Deactivation Warning – Beginning of February – HQ emails non-renewed members a reminder to renew their membership prior to month’s end to avoid service deactivation.  
• Local MD Officers – Check the list of Non-renewing members in OU Analytics. Contact these members asking them to renew, paying special attention to first year members.  
• Membership is Deactivated – End of February – Annual refresh of the IEEE membership database to determine which members have allowed their membership to go into arrears.  
• New member outreach - Volunteers should connect with new members in their area. A list can be pulled in OU Analytics. | Section MD Officer: Develop communication plans for local outreach to past-due members who will have their access to IEEE member benefits turned off starting 1 March. Members will be placed in an “Arrears” status. |
| March      | • Make recovery-related activities your first priority.  
• ½-Year Dues Cycle – IEEE HQ begins accepting ½-price dues for present year of service. Individuals who join IEEE this month receive 10 months of membership for the price of 6. Incorporate message into outreach.  
• Conferences & Section Meetings – Identify opportunities to disseminate membership brochures at conferences, Section meetings and local events.  
• Need materials for your conference? Request resources via the Conference Support and Promotion Request form at: www.ieee.org/cmr | • Fellow Deadline: All forms (nomination, reference & endorsement) must be received by 1 March.  
• New member outreach - Volunteers should connect with new members in their area. A list can be pulled in OU Analytics. | Arrears Recovery / HQ – Recovery outreach begins for those members whose membership has lapsed. E-mail messages to recover arrears members in all regions. Region and Section recovery efforts should also commence. |
| April      | Quarterly Conference Call. Region & Section MD Officers meet/greet, set annual goals, plan local arrears recovery effort.  
• Make recovery-related activities your first priority.  
• ½-Year Dues Cycle – IEEE HQ is accepting ½-price dues for present year of service. Individuals who join IEEE this month receive 9 months of membership for the price of 6. Incorporate message into outreach.  
• Organize Membership Recruitment at Universities and Companies.  
• Conferences & Section Meetings – Identify opportunities to disseminate membership brochures at conferences, Section meetings and local events. | • Fellow Evaluation: the societies/technical councils begin their review of Fellow nominations on 15 April.  
• Senior Member Meeting dates posted to web, plan your Senior Member activities prior to the meetings to meet nomination guidelines and deadlines.  
• New member outreach - Volunteers should connect with new members in their area. A list can be pulled in OU Analytics. | Arrears Recovery / HQ – 4th Notice – HQ mails print notification to non-renewed members informing them their IEEE membership is in arrears.  
Section MD Officer: Use eNotice in vTools to run email campaigns to past-due members (arrears). |
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<tbody>
<tr>
<td>May</td>
<td>• ½-Year Dues Cycle - IEEE HQ is accepting ½-price dues for present year of service. Individuals who join IEEE this month receive 8 months of membership for the price of 6. Incorporate message into outreach.</td>
<td>• Utilize IEEE-branded blank note cards to send a handwritten message to new members.</td>
<td>Arrears Recovery / HQ - IEEE e-mail outreach continues. Begin shifting focus to recruitment programs and activities.</td>
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<tr>
<td></td>
<td>• Conferences &amp; Section Meetings Identify opportunities to disseminate membership brochures at conferences, Section meetings and local events.</td>
<td>• Section MD Officer - Use eNotice in vTools to run email campaigns to past-due members (arrears).</td>
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<td></td>
<td>• Organize Membership Recruitment at Universities and Companies.</td>
<td>• New member outreach - Volunteers should connect with new members in their area. A list can be pulled in OU Analytics.</td>
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<td>June</td>
<td>• ½-Year Dues Cycle - IEEE HQ still accepting ½-price dues for present year of service. Individuals who join IEEE this month receive 7 months of membership for the price of 6. Incorporate message into outreach.</td>
<td>• First elevation of students with indicated graduation date between January and June. Process takes place at end of June. Opportunity to touch those graduating students within your Section.</td>
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<td></td>
<td>• Conferences &amp; Section Meetings Identify opportunities to disseminate membership brochures at conferences, Section meetings and local events.</td>
<td>• Fellow Evaluation: Societies/technical councils end their review of Fellow nominations on 15 June.</td>
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<td></td>
<td>• Organize Membership Recruitment at Universities and Companies.</td>
<td>• Conference Member Recruitment (CMR) program for use at conferences, ieee.org/cmrr</td>
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<td></td>
<td>• IEEE Day events are applicable to recruitment and retention. Start planning a technical, professional or celebratory event with the section and society to engage members and non-members For Fall.</td>
<td>• New member outreach - Volunteers should connect with new members in their area. A list can be pulled in OU Analytics.</td>
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<tr>
<td>July</td>
<td>• ½-Year Dues Cycle - IEEE HQ still accepting ½-price dues for present year of service.</td>
<td>• Fellow Evaluation: The Fellow Committee begins their review of Fellow nominations on 1 July.</td>
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<tr>
<td></td>
<td>• Conferences &amp; Section Meetings: Identify opportunities to disseminate membership brochures at conferences, Section meetings and local events.</td>
<td>• New member outreach - Volunteers should connect with new members in their area. A list can be pulled in OU Analytics.</td>
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<td>• Organize Membership Recruitment at Universities and Companies.</td>
<td>• IEEE Day events - Start planning a technical, professional or celebratory event with the Section and society to engage members and non-members. IEEE Day is the first Tuesday in October. Events can be planned anytime during that week.</td>
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<tr>
<td></td>
<td>Quarterly Conference Call. Region &amp; Section MD Officers meet/greet, set annual goals, plan local arrears recovery effort.</td>
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# Getting Started Checklist

To jump-start your familiarity with IEEE membership development, here is a quick checklist that will help introduce you to IEEE’s membership development program and to your team.

<table>
<thead>
<tr>
<th>TASK</th>
<th>COMPLETED</th>
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<tbody>
<tr>
<td><strong>Get to know your resources within IEEE:</strong></td>
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<tr>
<td>MD Resources <a href="http://iee.org/md">IEEE</a></td>
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<tr>
<td>IEEE Volunteer Tools (<a href="http://vtools.ieee.org">vTools</a>)</td>
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<tr>
<td>- OU Analytics <a href="http://ouanalytics.iee.org">IEEE</a></td>
<td></td>
</tr>
<tr>
<td>- eNotice <a href="http://enotice.vtools.ieee.org">enotice.vtools.ieee.org</a></td>
<td></td>
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<tr>
<td>- Events <a href="http://events.vtools.ieee.org">events.vtools.ieee.org</a></td>
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<tr>
<td>IEEE Contact and Support <a href="http://contactcenter.ieee.org">IEEE</a></td>
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<tr>
<td>Section/Chapter Support <a href="http://resources-operations/geographic-unit">IEEE</a></td>
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<tr>
<td>Senior Member Program <a href="http://about/volunteers/membership-development/senior-member.html">IEEE</a></td>
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<tr>
<td>IEEE Member-Get-A-Member Program <a href="http://mgm">IEEE</a></td>
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<td>Membership Development at Conferences <a href="http://cmr">IEEE</a></td>
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<tr>
<td>IEEE Contacts and Volunteer Rosters <a href="https://mga.ieee.org/contact-volunteers-staff">IEEE</a></td>
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</tbody>
</table>

- Read this manual and the Membership Development Work Book, outline your key activities and objectives.
- For membership training visit either:
  - The MD Portal: [IEEE](http://md)
  - The IEEE Center for Leadership Excellence: [IEEE](http://CLE)
- Ensure that you are registered to receive the monthly Global Membership Development report and announcement for the monthly MD Webcast.
- Send an email to [listserv@listserv.ieee.org](mailto:listserv@listserv.ieee.org), leave the subject line blank and type "subscribe MD-ALERT-ALL" in the body of the message (without the quotes).
- Know the global member benefits of IEEE by geographic location (country) and member career phase. [IEEE](http://benefits)
- Identify members as potential Volunteer officers for membership development within your IEEE Region, Section and/or Society. Get their contact information, and introduce yourself.
- Visit and review the resources located on the IEEE Membership Development website [IEEE](http://md). Review the MD Webcast Archive Guides from the previous year and select the webcast or presentation you wish to review.
- Acquire the most recent membership statistics for your Region and Section:
  - OU Analytics [IEEE](http://ouanalytics)
  - Monthly Region Membership Development Report - ask your Region’s membership support staff
- OU Analytics and access to to staff roster are on secured sites. Your IEEE sign on is needed to access.
- Need further support?
  - Contact your Region’s Executive Committee. For contact info visit [rosters.ieee.org](http://rosters.ieee.org)
  - Join the Volunteer Support Groups in CollabratecTM: [IEEE](http://collabratec.ieee.org)
    - IEEE Volunteer Exchange
    - Membership Development Volunteers
Resources

Enabling IEEE’s Volunteers is essential to effective membership development. Please take a few minutes to acquaint yourself with IEEE’s membership development resources and tools.

Membership Development Portal
As a Membership Development Officer, you should familiarize yourself with the membership development portal. This one-stop resource allows you to access all the tools and resources you will need in your MD efforts. Should you need to contact Volunteers and Staff involved with membership development, the site also provides a list of Committee and Staff contacts. To access the MD portal visit: www.ieee.org/md.

IEEE Volunteer Tools (vTools)
IEEE volunteer tools (vtools) is a suite of tools developed by volunteers for IEEE members and IEEE volunteers. The “toolbox” simplifies organizational efforts and administration by offering web-based software in order to reduce time spent on managing local activities and to assist in member development. The main site is: vtools.ieee.org

There are a number of tools in the toolbox. For now, we’ll focus on the top 3 for membership development.

OU Analytics
OU Analytics is a visual business intelligence tool for volunteer access to member data. It is broken down into 6 major dashboards, each with their own sub-dashboards. These dashboards provide real time data related to IEEE membership metrics, society/affinity group/student branch statistics and more, along with accompanying member data. The available information provides an excellent overview of our members.

For the most up-to-date details and training for OU Analytics visit: ieee.org/ouanalytics

eNotice
eNotice is an electronic newsletter subscription service that has been developed for IEEE organizational units to facilitate email distribution of newsletters, meeting notices and IEEE conference materials. Messages can be sent the same day to a number of member categories/segments. More importantly, all member communications preferences are automatically observed. This is the easiest, most compliant method of communicating with your members. For more details visit: enotice.vtools.ieee.org

Events
vTools Events is an end-to-end meeting/event planning management tool. The user can set up, promote and report on their activities all via this one tool. There is no need to upload member invite lists, as Events connects to eNotice. Users can also accept registrations with the tool and send follow up messages to both member and non-member registrants, making this an excellent option for post-event communications as well. Once the event loaded to the system, the details are shared across three IEEE platforms providing an added layer of promotion. Upon completing the event, it is a simple few clicks to submit the required reporting to IEEE. For more details visit: events.vtools.ieee.org

Need help?
Tutorials are available for all IEEE vtools at: sites.ieee.org/vtools/training/

Volunteers may also submit questions to the following email address: mga-im@ieee.org
Membership Development Planning

1. Make sure that there is a Membership Development (MD) Officer appointed for your entity.

This is a crucial first step. This person does not have to be experienced in Membership Development per say, but they should be willing to learn and have time available to develop and implement membership goals and plans. It is very important that the names and contact information of MD Officers are reported to IEEE at: officers.vtools.ieee.org

2. Develop a Membership Plan.

An effective membership plan is driven by data, and integrates multiple membership development tactics. At a minimum, each Section should map out their calendar of events and conduct monthly outreaches with messages tailored to your members’ interests. The Member Marketing staff has created a separate workbook which focuses specifically on the best practices of membership planning. Many of the data sources and tactics listed below can be integrated into your plan, so be sure to familiarize yourself with them.

Access the workbook >> ieee.org/md

Region Monthly MD Reports

Monthly MD reports are available for all 10 IEEE Regions. These reports capture the overall IEEE Global and Region specific statistics, along with individual Section Statistics, covering Total Membership, Renewal data and Recruitment activity. Although the reports appear long, a Section officer really only needs to find their Section’s data in the report. This can be used to gauge your efforts against the Region and the global statistics. There is also a section in the report of tips and resources that are updated monthly that can also be quite helpful for your efforts. These reports are developed by IEEE Membership Staff in conjunction with your Region Membership Development Chair. Be sure to let your Staff contact and Region MD Chair know if you are not receiving the report and they can add you to the distribution.

Programs to Promote:

Member-Get-a-Member Program

The Member-Get-a-Member Program encourages members to recruit their colleagues or fellow students to become IEEE members. As a reward for their efforts, they receive credit that can be used toward the following year’s IEEE dues, IEEE Society fees or the purchase of IEEE books and publications. Alternatively, members can donate the value of their credit to the IEEE Foundation. MGM awards will be distributed the last week in September based on recruiting activity from 16 August to 15 August.

Learn more >> ieee.org/mgm

Hold Joint Section, Affinity Group or Chapter Meetings with Local Student Branch

Bring food and give the students a chance to meet professional IEEE members, ask questions about engineering careers and start building their networks before graduation.
Senior Member Upgrade
IEEE membership statistics reveal that individuals who hold Senior Member grade are more likely to renew their IEEE membership. Membership Development officers should make Senior Member elevation a high priority. Sections and Societies also benefit from the program. Sections and Societies who nominate at least five successful new Senior Members will be awarded US $10 for each Senior Member they nominate who is approved and elevated to Senior Member in a calendar year. No rebate will be awarded if it is for less than US $50. The rebate is paid out in the following calendar year.

New Senior Members receive an engraved, wood and bronze plaque to proudly display, along with:

- Voucher (up to US$25 value) which can be used when joining one new Society
- 6 personalized certificates (US$25 value) which may be given out to colleagues or mentees in the profession inviting them to join IEEE and receive $25 off their membership
- Letter of commendation to his/her employer on the achievement of Senior Member grade (upon the request of the newly elected Senior Member)
- Announcement of elevation in Section/Society and/or local newsletters, newspapers and notices
- Eligibility to hold executive IEEE volunteer positions

IEEE STEP (Student Transition & Elevation Partnership)
This program provides a standardized yet localized program for facilitating the transition from student member to young professional, by introducing the opportunities and benefits of IEEE membership during the onset of a career. By identifying recent IEEE Student members who have graduated with an undergraduate or graduate degree, you can help retain members by capturing any change of address, email or other contact information. Funding is available – collaborate with IEEE Young Professionals Affinity Group and Section leadership to organize a STEP event.

Learn more >> yp.ieee.org/step/

Gift of Membership
IEEE members and non-members have the opportunity to give the gift of IEEE membership. IEEE offers professional and student membership gift options.

Learn more >> ieee.org/gift

Membership Development at Conferences
Conferences, seminars, and technical meetings that are sponsored or co-sponsored by IEEE offer great opportunities to recruit new IEEE and Society members. This activity should be performed jointly by the local Section and Regional MD Officers, the Region Conference Coordination Committee, the Chair (or an appointed member) of the Conference Organization Committee and the IEEE Staff.

To find Conferences in your area visit: ieee.org/conferences

Every IEEE sponsored Conference has a provision in their contract requiring an IEEE Membership presence on-site. Your Section Executive Committee therefore should plan on having a membership development table staffed by local volunteers. The MD officer for the sponsoring Society should contact their conference chairs well in advance to assure that a skirted table and display space is made available for a membership table.

If possible, try and request exhibit space in the registration area, which is usually a high traffic area well suited for the MD table location. Also, locate and reserve the Society’s Banner to display at the table. Make sure there is enough room for a few chairs. If you have a laptop at the exhibit table, confirm that the room or your space has an Internet connection.
Membership Development at Conferences (continued)

Listed below are tips to help your MD Booth be a success at both conferences and your local events:

- An MD table or booth should be located near the Conference Registration Desk as an IEEE Information Center.
- The MD booth should be equipped with promotional material including membership recruitment brochures, higher-grade applications, various IEEE printed materials, magazines and giveaways which can be ordered via the MD materials order form.
- The local Section or Region MD Officer with the Conference organizers should arrange that the MD promotional material be requested and received on time.
- In cooperation with the Registration Desk there should be a possibility to join IEEE online. Conference participants joining IEEE at the Conference should pay the reduced fee for members.
- The booth should be staffed by IEEE volunteers familiar with IEEE advantages and activities. The local Section and its MD Officer together with the Conference organizers should look for volunteers. Student members are often interested to staff this type of activity.
- As part of the IEEE membership team and representing your local Section or Society, have business cards or Member-Get-a-Member (MGM) cards to offer while discussing IEEE membership. Use the card as you introduce yourself and talk about how you benefit from IEEE membership either by volunteering today or the services and benefits you utilize the most from IEEE.
- There is a looping PowerPoint presentation you can use available on the MD portal.
- Consider streaming videos on a monitor. The IEEE Member Experience Channel on IEEE.TV and the IEEE Brand Experience website have a number of options to choose from.
- If you have a laptop at your exhibit table, use it to:
  - Let attendees join/renew
  - Capture contact information for people interested in learning more about IEEE or volunteering
  - Show attendees what IEEE has to offer via the IEEE website

The Conference Member Recruitment (CMR) Program

The CMR program is also available to help recruit new IEEE members at conferences. As an incentive to join IEEE, each new full-dues paying higher grade IEEE membership applicant is given a free membership to one of IEEE’s 39 technical societies. This is in addition to the normal discount that IEEE members receive on the conference registration fee.

To request MD materials or a CMR code for conferences >> ieee.org/cmr

IEEE Video Resources

IEEE videos bring the mission and vision of IEEE to life. By showcasing the core purpose of IEEE, to foster technological innovation and excellence for the benefit of humanity, these videos illustrate how and why IEEE is essential to the global technical community and to technical professionals everywhere. There are two resources available to access video content:

IEEE Brand videos >> brand-experience.ieee.org/brand-videos/

The IEEE Experience Channel >> ieeetv.ieee.org/channels/ieee-experience
3. Know your membership goals.

Each year, the Membership Recruitment and Recovery Committee (MRRC), in conjunction with Membership Development (MD) staff, establishes goals related to growing IEEE membership.

MD goals are established for each individual Section, for both recruitment and retention. The Section goals are then rolled up to the Region level, producing a Region goal for recruitment, retention, and overall membership.

Section goals are developed using the last three years’ trends for recruitment and retention. Each Section has a unique goal based on different dynamics, so the methodology for creating the goal is different based on whether the Section has had growth or decline three years in row, as well as the overall size and location of the Section.

The data showing progress to goals will be reported at the Section level every month in the Regional Membership Development reports. The global Membership Development reports will show the progress rolled up by Region.

4. The MD officer cannot do all the MD work that will be needed.

Invite life members, students, YP Affinity Group members and others with some available time to help share the work. The tasks, no matter how trivial, can yield profound results. Something as simple as designating an individual the “brochure person,” responsible for bringing membership applications to every Section or Chapter event, will ensure a membership recruitment presence for non-members in attendance. Designating an individual as a “greeter” at an event will establish a welcoming environment.

5. Promote IEEE Membership.

Display member benefits on all IEEE Entity Web pages, and provide a link to the online membership application. Have a staffed membership table with applications and related MD materials at all Section, Student Branch and Chapter meetings. Recognize those local companies who support IEEE activities and membership.

IEEE membership brochures and other promotional supplies are available to membership development officers and their respective organizational units, e.g., Sections, Societies via the MD materials order form.

Order supplies online >> ieee.org/md

6. Communicate Value and Benefits.

Communicate the benefits and services offered by IEEE at all meetings and activities. Before you can communicate the value of IEEE membership, you need to first know the benefits of membership.

View all member Benefits >> ieee.org/benefits

7. Reward your MD volunteers.

Acknowledge and showcase the volunteers who advance your membership development plan. Present them with certificates of accomplishment, buy them dinner, and/or submit their names to IEEE for recognition in the monthly membership development progress report.
Membership Development Portal

Located at ieee.org/md, the MD portal offers a gateway to the resources & tools, peer-to-peer collaboration, as well as reports & analyses available to membership development volunteers. Whether your focus is on recruiting new members at meetings or conferences, retaining members or working to recover IEEE members, information and tools are ready to help you.

Resources & Tools – The MD home page contains links to many resources (OU Analytics, Print-on-Demand documents, MD Webcast Archive Guides, Presentations to make your own, program pages and the MD materials order form).

Membership Training – A series of short (5-20 minute) training videos have been developed and posted on the MD Portal. These modules provide an overview of membership development and guidance to effectively grow and retain membership in your Section/Region.

The IEEE Brand Identity Toolkit explains the basic usage rules for all corporate identity elements and how to utilize them for your communication pieces. Access to IEEE volunteer business cards, letterhead, PowerPoint presentations, and word templates for flyers and handouts at: brand-experience.ieee.org

MD Webcast – MD officers and volunteers are invited to attend monthly MD Webcasts which provide an overview of the monthly IEEE statistics, as well as presentations from volunteers and staff on topics related to membership development, recruitment, retention, recovery, strategy and updates on IEEE services, products and benefits. The MD email list “md-alert-all” provides announcements of the monthly MD webcast and the Monthly MD Report as well as general MD information.

MD Monthly Report – The Monthly MD Report provides the latest statistical ‘pulse’ of global membership, membership trends and MD Calendar guidance, along with MD-related announcements and activities. Regional MD Monthly Reports provide an in-depth view of MD activities within a Region, including Section data. Regional reports are sent out by the Region 1-10 MD Chairs.
Developing Your Membership Team

These lists will help you get started – you know your area’s volunteers the best! Build each role to what you need to get accomplished.

Who can help me?

- Ask your Section or Society officers if they could refer available volunteers or have a pool of volunteers interested.
- Recruit members from your Section – students, Young Professional members, Life Members.
- Set up your team and let them know what the work is and who is doing what.
- Mobilize the resources your Section or Society has.

What is the Work?

- Outline the work you want to accomplish.
- Outline the work you need accomplished.
- Break down the work into the amount of time needed, how often it gets done (frequency) and prioritize.
- Outline the work so those interested can see if they have the skills and/or time to help.
- Determine which volunteers will be working and assign tasks.

Communicate regularly with your team

- Set up an email list to send communications on projects.
- Update your Section or Society officers on your team’s progress.
- Update status of work to team so they know projects or work are moving forward or not meeting deadline.
- Inspire and encourage your team to work toward the goals.

Recognize the volunteer effort

- When work is completed, recognize the volunteers’ accomplishments to the team and to your Section or Society officers.
- Acknowledge those on your team at Section or Society meetings.
- Nominate for a Region, Section or Society award. View Awards & Recognition information at ieee.org/about/awards/index.html
IEEE Membership Development Activities

IEEE’s membership development activities are coordinated through the Member and Geographic Activities Board Membership Recruitment and Recovery Committee (MRRC). The MRR Committee creates, promotes and monitors appropriate and effective membership development programs to increase IEEE membership.

More information on the MRR Committee >> ieee.org/md

First Year New Member Experience

Attracting and recruiting new members is critical to growing membership. However, joining IEEE is only the beginning of what we hope to be a long term relationship. The process to retain these members begins the day they join.

To help new members understand and navigate IEEE during their first year experience, IEEE sends a Welcome email with a link to a "Getting Started" webpage. This page has a pre-recorded new member welcome video along with links to the most used IEEE benefits broken down into six categories:

- Technical Content
- Networking
- Career Resources
- Local Activities
- Discounts
- Humanitarian & Philanthropic Opportunities

To access the page >> ieee.org/start

In addition to the Welcome email, new members will receive a series of automated messages over the first few months of their membership aimed at helping them to familiarize themselves with the larger IEEE and connect them to the reasons they joined. At this point, new members also start to receive the monthly member benefits bulletin, society information (should they belong to a society), and other generic IEEE messages. While IEEE strives to inform our new members, the view from the IEEE email series is on a macro scale.

As an IEEE Membership volunteer, you play a critical role in supporting our new members in navigating IEEE’s landscape. Most new members will engage IEEE on a local level making new member outreach from the Section/Chapters a key activity in your membership planning. One of the best ways to strengthen a new member’s ties with IEEE is to send a message from your local Section. Points to include in this message are:

- Congratulatory/thank you message for joining
- Short overview of your Section and introduction of who you are
- List of key Section contacts in case they need assistance
- Invitation to attend an upcoming event/meeting
- Reminder to register and attend a New Member Orientation session

New member lists can be generated using the "Membership, Subscriptions and More" sub-dashboard in OU Analytics. Be sure to use the member communication preferences data to remove members who do not want to be contacted.

For new member email templates >> ieee.org/md

Access OU Analytics >> ieee.org/ouanalytics
Senior Member Elevation Events

The grade of Senior Member is the highest for which application may be made and shall require experience reflecting professional maturity. For admission or transfer to the grade of Senior Member, a candidate shall be an engineer, scientist, educator, technical executive, or originator in IEEE-designated fields for a total of 10 years and have demonstrated 5 years of significant performance.

Learn more >> ieee.org/seniormember

The IEEE Senior Membership Nomination Event Guide was developed to provide the necessary tools to conduct a successful event in the recruitment of members to Senior Member grade elevation. The Event Guide contains Microsoft Word documents that can easily be customized for your nomination event, showing you what to do throughout the entire process from five weeks prior to the event to one day after the event. Holding a Senior Member event provides potential Senior Member applicants with the opportunity to network with potential references and receive guidance on completing their application. It also provides your Section or Society the opportunity of engaging IEEE members at all levels.

IEEE Fellow Program

IEEE Fellow is a distinction reserved for select IEEE members whose extraordinary accomplishments in any of the IEEE fields of interest are deemed fitting of this prestigious grade elevation. Learn about the history of the IEEE Fellow grade, the elevation process, and how the program evolved through the years to become the program it is today:

Learn more >> ieee.org/fellow

Additional IEEE Memberships

Additional memberships are also available — Society, Standards, Women in Engineering and Young Professional memberships enrich the IEEE experience.

IEEE Society Membership — Membership in an IEEE Society offers both tangible and intangible benefits. Members have cited the following benefits that influence their decision to join a Society: affiliating or identifying oneself with a prestigious professional organization; having access to multi-disciplinary technical information; creating opportunities for peer networking; having the opportunity to publish and participate in conferences at member reduced rates; and advancing professionally on the job.

View IEEE’s Societies >> ieee.org/societies

IEEE Standards Association Membership — Influence the direction and application of standards development worldwide. Learn more >> standards.ieee.org

IEEE Women in Engineering (WIE) Membership — a global network of IEEE members and volunteers dedicated to promoting women engineers and scientists, and inspiring girls around the world to follow their academic interests in a career in engineering and science. Learn more >> wie.ieee.org

IEEE Young Professionals (YP) — an international community of IEEE members and volunteers who have graduated from their first professional degree within the past 15 years. YP members are interested in elevating their professional image, expanding their global network, connecting with peers locally and giving back to their community. Learn more >> yp.ieee.org

www.ieee.org/md
IEEE Member Benefits

Knowing how IEEE can benefit others requires an understanding of all the benefits IEEE offers. IEEE is the world’s largest technical society, bringing members access to the industry’s most essential technical Information, networking opportunities, career development tools, and many other exclusive benefits. IEEE membership benefits break down into two categories: (1) Core Benefits received by all individuals who join IEEE, and (2) Premium Benefits, which are available exclusively to IEEE members at an additional cost.

- **Collabratec®** – IEEE’s online social platform where technology professionals can network, collaborate and create.
- **IEEE.tv™** – an award-winning, Internet-based television network delivering special-interest programming about technology and engineering for the benefit of IEEE’s members and the general public.
- **eBook Classics** – IEEE members now have access to more than 350 eBooks from the IEEE Press collection through IEEE Xplore.
- **IEEE Spectrum Magazine** – 12 monthly issues (print) and online, digital delivery
- **IEEE Potentials Magazine** – 6 issues (online). All members have access to Potentials articles via IEEE Xplore
- **Today’s Engineer** – monthly e-zine devoted to the issues affecting IEEE members’ careers
- **IEEE Xplore® digital library** – with over 4 million full-text documents, discover and access scientific and technical content published by IEEE
- **GoogleApps@IEEE**
- **Member-only discounts** on IEEE conferences, publications, educational offerings and business/financial services
- **IEEE Sections and Technical Chapters** - network with local members who share similar interests
- **IEEE Job Site** – locate career opportunities easily and confidentially
- **IEEE Career Alert** – a weekly email newsletter containing career advice plus the job of the week from the IEEE Job Site
- **IEEE Mentoring Program** – This online program, offered through Collabratec®, facilitates the matching of IEEE Members for the purpose of establishing mentoring partnerships.
- **IEEE ResumeLab** – Provides the ability to use templates to build a customizable resume, cover letter, etc., publish information to a sharable website and uses standardized language to assist for members for whom English is a second language.
- **Consultants Database** – a service available for matching technical consultants to clients
Premium Benefits – Benefits Requiring an Additional Fee

- **IEEE Continuing Education Programs** – short courses and workshops delivered online in one-hour learning modules, offering Professional Development Hours (PDH) or Continuing Education Units (CEUs) to help maintain licensing or certification
- **IEEE Learning Network** - online website of over 600 educational courses offering the latest in continuing education in engineering, technology, and more.
- **IEEE Education Partners Program** – up to a 10% discount on online degree programs, continuing education and certificate programs.
- **IEEE Member Digital Library** – access up to 25 full-text articles a month from any IEEE publication or conference proceeding
- **Proceedings of the IEEE** – leading authoritative resource for in-depth research coverage, tutorial information and reviews
- **IEEE Member Discounts** – insurance products and discounted products and services (including home & office services) designed for the professional technologist and engineer
- **Travel Services** – enhancing the overall travel experience for IEEE members and their families

*View all member benefits >> ieee.org/benefits*
Extra Help

Responding to Membership Objections

As an IEEE Volunteer attempting to recruit new members, expect to hear objections to IEEE membership and pointed questions about membership value. This is normal—we all compare. How you respond to such objections will differentiate your recruitment success from others. Listed below are common objections to IEEE membership, and suggestions for how you can respond. Ask the member to go to the Global Benefits Finder to sort by country and their current career phase to view what is available for developing their career at www.ieee.org/benefits

My employer will not pay for my dues.
Response: We’re grateful that some employers reimburse for IEEE membership dues, but IEEE membership is about individuals who desire to take ownership of their career, regardless of an employer’s willingness to reimburse dues. Individuals who belong to IEEE take personal responsibility for their careers.

IEEE membership is too expensive.
Response: The cost of IEEE membership compared to most professional associations is significantly lower, as much as 30%, compared to organizations such as the National Society of Professional Engineers, American Medical Association, and the American Bar Association. When you really think about it, IEEE membership dues are quite reasonable when you consider the quantity and quality of benefits offered to members. Also, IEEE membership often pays for itself. The discounts members receive on IEEE products or attending a conference makes membership a good return-on-investment. For professional-grade applicants whose income does not exceed $14,700, IEEE offers a 50% reduction in IEEE dues, regional assessments and dues for one IEEE Society and its optional publications.

The value of IEEE membership does not justify the cost.
Response: IEEE membership offers an array of benefits that may be of interest to you. Perhaps you are unaware of some of these benefits. They include access to technical publications; professional and educational development; unique networking venues; discounts on conference attendance, insurance programs, IEEE products. Every member has their own, personalized gateway into IEEE membership via myIEEE.

I have no time to read the publications.
Response: It’s a constant challenge between finding the time to be informed, and one day discovering that you’re not technically current. Our members tell us that reading IEEE publications saves them time, as they do not need to “reinvent-the-wheel” at work. IEEE publications are the world’s best collection of technical information. Taking the time to read this information keeps you technically current. Investing 30 minutes with one publication could save you 40 hours of research at work.

I can find all this information on Google—what’s the value of membership?
Response: There’s a lot of information to be found on Google, but IEEE publications are not available for free on Google. Moreover, the quality of technical information found via Google is random, and doesn’t adhere to any consistent standards of technical excellence. Did you know that 60,000 patents cite IEEE information? – These patents cite IEEE, not Google. IEEE membership is much more than access to information. It’s about networking, professional development, and you taking personal responsibility for your career. Membership is about meeting new colleagues, and coming into contact with really great people—individuals who join IEEE form friendships that last a lifetime. You wouldn’t meet these people on Google.
**I can get all of the information through my employer, so why should I belong?**

**Response:** Information is only one component of IEEE membership. Yes, organizations worldwide rely upon IEEE information to be technically current and competitive—it speaks to IEEE’s quality. IEEE membership is more than access to information. IEEE membership is about you being competitive and taking personal responsibility for your career. IEEE’s benefits include venues and tools for members to network, build valuable professional connections, and hone leadership skills. These are essential meeting new colleagues, and coming into contact with really great people—individuals who join IEEE form friendships that last a lifetime. IEEE membership is more than what you receive—it’s also about what you’re giving back. When you belong to IEEE, you are supporting a much larger mission—your membership enables initiatives such as public information and policy efforts, affordable student membership, and the introduction of technology careers to young people worldwide.

**I’ve recently been unemployed, and can no longer afford the dues.** **Response:**
IEEE will help you during these times. IEEE has a reduced-dues program for unemployed members, which allows you to keep your benefits, which are very helpful for finding a new job—for example, networking at local Section and Chapter meetings, uploading your resume to the IEEE Job Site, engaging the career navigator.

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**IEEE Contact & Support Center**

The IEEE Contact Center is available to answer your questions about IEEE, including IEEE products and services, and all aspects of membership (renewal, reinstatement, elevation, grade change and more!). Part of the IEEE Contact Center, the IEEE Support Center provides answers online to the most frequently raised questions. You can also connect in a live chat with an Associate online.

**Questions, responses and live Chat >> supportcenter.ieee.org**

IEEE Contact Center located at ieee.org/contactcenter

Email contact at: contactcenter@ieee.org

IEEE Support Center located at supportcenter.ieee.org

Telephone
+ 1 800 701 4333 USA and Canada
+ 1 732 981 0060 Worldwide

Submit a Question to the IEEE Support Center, supportcenter.ieee.org/app/ask

Use the live Chat feature to talk with a Support Center Associate
THANK YOU FOR YOUR VOLUNTEER LEADERSHIP AND FOR MAKING A DIFFERENCE