Meeting Member Technical Needs by Building Strong Chapters

Sections Congress – Amsterdam
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Jacek Zurada - IEEE V-P Technical Activities
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How to Meet Members’ Technical Needs by Building Strong Chapters?

Jacek Zurada
IEEE V-P Technical Activities
Overview

• Who is Technical Activities?
• Statistics on Chapters, Regions, Sections
• How to initiate successful Chapters?
• How to sustain successful Chapters’ activities?
• Chapter funding: best known secrets
• Discussion
• Appendix: Examples of successful programs
  • TISP
  • Minesweepers
  • Hackathons
Who is Technical Activities?

• 353,496 Society memberships (216,015 individuals) as of December 2013
• Technical Activities Board (TAB)
• 39 Societies and 6 Councils
• Technical Communities in various phases of maturity
• TAB Committees, some IEEE-wide Committees (ex. Conferences, Future Directions)
• TA Staff
• Volunteers for journals, conferences, chapters (members & non-members)
IEEE Conferences
IEEE Society/Council/Geographic Unit/Other – Sponsored/Co-Sponsored

Conference Activity through 31 December 2013

<table>
<thead>
<tr>
<th>Year</th>
<th>Financially Sponsored</th>
<th>Technically Co-Sponsored</th>
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IEEE publishes **161** Journals, Transactions and Magazines and represents **more than 30% of the world’s annually published literature** in electrotechnology, computing and related fields.
Society Memberships by Region (26 May 2014)

R7 – 8,448 Memberships
R8 – 43,575 Memberships
R9 – 8,570 Memberships
R1 to 6 – 95,685 Memberships
R1 – 16,081 Memberships
R2 – 14,493 Memberships
R3 – 13,342 Memberships
R4 – 11,075 Memberships
R5 – 13,270 Memberships
R6 – 27,424 Memberships
R10 – 43,790 Memberships
Chapters by Section (Small) (26 May 2014)

R7, Saint Maurice Section – 2 Chapters
R8, Belarus Section – 4 Chapters
R9, Aguascalientes Section – 0 Chapters
R10, Kwangju Section – 0 Chapters

R1 to 6
R1, Berkshire Section – 2 Chapters
R2, Lima Section – 0 Chapters
R3, Tri Cities Section – 1 Chapter
R4, Missouri Slope Section – 1 Chapter
R5, Arkansas River Valley Section – 0 Chapters
R6, Alamogordo-Holloman Section – 0 Chapters
Society Memberships by Section (Small) (26 May 2014)

- R7, Saint Maurice Section – 26 Memberships
- R8, Belarus Section – 37 Memberships
- R10, Kwangju Section – 88 Memberships
- R1, Berkshire Section – 55 Memberships
- R2, Lima Section – 38 Memberships
- R3, Tri Cities Section – 50 Memberships
- R4, Missouri Slope Section – 47 Memberships
- R5, Arkansas River Valley Section – 18 Memberships
- R6, Alamogordo-Holloman Section – 9 Memberships
- R9, Aguascalientes Section – 14 Memberships
Chapters by Section (Medium) (26 May 2014)

- R7, Kitchener-Waterloo Section – 19 Chapters
- R8, Norway Section – 8 Chapters
- R9, Centro-Norte Brasil Section – 7 Chapters
- R1, New Hampshire Section – 7 Chapters
- R2, Columbus Section – 7 Chapters
- R3, Central Virginia Section – 1 Chapter
- R4, Central Illinois Section – 1 Chapter
- R5, High Plains Section – 2 Chapters
- R6, Albuquerque Section – 5 Chapters
- R10, Kolkata Section – 12 Chapters
Society Memberships by Section (Medium) (26 May 2014)

- R7, Kitchener-Waterloo Section – 441 Memberships
- R8, Norway Section – 774 Memberships
- R9, Centro-Norte Brasil Section – 229 Memberships
- R1, New Hampshire Section – 786 Memberships
- R2, Columbus Section – 707 Memberships
- R3, Central Virginia Section – 332 Memberships
- R4, Central Illinois Section – 538 Memberships
- R5, High Plains Section – 532 Memberships
- R6, Albuquerque Section – 663 Memberships
- R10, Kolkata Section – 892 Memberships
Society Memberships by Section (Large) (26 May 2014)

R1 to 6
- R1, Boston Section – 4300 Memberships
- R2, Northern Virginia Section – 2762 Memberships
- R3, Atlanta Section – 2123 Memberships
- R4, Chicago Section – 2455 Memberships
- R5, Dallas Section – 2041 Memberships
- R6, Santa Clara Valley Section – 6392 Memberships

R7, Toronto Section – 1761 Memberships

R8, U.K. & Rep of Ireland Section – 5994 Memberships

R9, South Brazil Section – 1204 Memberships

R10, Tokyo Section – 5998 Memberships
Chapters

- 2359 Chapters
- Receive support from both Section and Societies
  - administrative & financial support from Sections
  - technical and some financial support from Societies
- Can be “joint”
  - across two or more Societies
  - or two or more Sections
- Provide value to members
Society/Technical Council Chapters

Consist of members from one or more IEEE Societies/Technical Councils who share technical interests and geographical proximity

Chapter activities include:
- guest speakers
- workshops
- seminars
Best Practices

- Develop members’ professional and leadership skills
- Locate speakers in the area
- Encourage growth and new members
- Recruit volunteers
- Motivate volunteers
- Recognize the work of volunteers
- Spread the work around
- Diversify the organization
Chapter development steps:

1. Analyze Society X membership in your Section
2. Contact Society X VP-Membership or Development for names of potential leaders (Chapters’ Founders)
3. Work with potential Founder on energizing the base
   - collect signatures
   - advise on potential activities
   - share lists of prospective leaders
   - use PPCT (upcoming tools) to populate the community

If Chapter in existence

1. Do select actions from the above to energize Chapter’s activities, increase membership etc
Chapter Formation

To form a new IEEE Society Chapter:
- Organizer must gather 12 or more signatures from IEEE Members on petition (higher-grade members of Society)
- Approval required from local Section and Society
- If a Chapter already exists, it can be expanded

Joint Society Chapters
- Comprised of two or more Societies with members that share similar field of interest
- Expands perspective / potential events and info sharing

Joint Section Chapters
- Membership across boundaries of two or more Sections
- Only one Section is the “administrative parent”, responsible for overseeing Chapter
Building Successful Chapters

- Officers’ roles must be established (sugg. 3-5)
- Chapter’s Committee needed with:
  - Chair
  - Vice Chair
  - Secretary
  - Treasurer
  - VP of Tech Programs (ex.)
  - VP of Membership (ex.)
  - VP of Communications (ex.)
Building Successful Chapters

- Regular meetings must be held (2+ per year) in order to ensure accountability of Chapter

- Officers should attend Section ExCom meetings to network with other local Chapters

- Chapters must report annually to the administrative Section and IEEE Headquarters
Maintaining Successful Chapters

- Active participation in S/C conferences
- Organization of special sessions in conferences
- Inclusion of special section of journals
- Organization of special meetings
- Engagement & Communications
  - Website
  - Newsletter
  - Membership list or PPCT circle
- Accountability
Maintaining Successful Chapters

Organization of
- Local workshops
- Lectures or Distinguished Lectures series
- Symposia to engage younger members
- Technical webinars / monthly meetings

Expansion of Student Chapters and membership development

Fostering relationships with other S/Cs or local chapters with overlapping interests
Maintaining Successful Chapters

- Establish training of future leaders
  - Experienced leaders serve as mentors
  - Develop young members and provide with increasing responsibilities
  - Emphasize volunteer experience should be personally and professionally rewarding and enjoyable

- Industry outreach
- Integration of students, practitioners and academics
- Incubation of new and evolving technology subjects
Example 1 of improvements: Map and time display for Chapter/Section events

Display conferences, DLs, chapter events & meetings on a map meshed w. google maps or another tool, with time codes
Example 2 of improvements: Map and time display for Chapter/Section events

- Identify points on the map with leaders, champions, moderators
- Link members and Sections, Chapters
- Link to actual membership data and email
IEEE Sections responsible for formation of local Chapters and Chapter Support

IEEE Section receives $$ for every active Chapter that has submitted required reporting and held at least two technical meetings

Additional bonus provided for Chapters reporting 6 or more technical, educational, or professional meetings

Many Societies elect to help chapters financially
- Some OUs provide regular funding
- Some OUs provide funding upon request
Questions
Teacher In-Service Program (TISP)

- **Train Volunteers**
  - IEEE Chapter/Section Members
  - IEEE Student Members
  - Teachers and Instructors

- Using approved lesson plans on engineering and engineering design

- IEEE members will develop and conduct TISP training sessions with teachers

- Teachers will conduct training sessions with students within their local Chapter/Section

www.ieee.org/teacherinservice
TISP Goals

- Empower IEEE “champions” to develop collaborations with local pre-university education community to promote applied learning
- Enhance the level of technological literacy of pre-university educators
- Increase the general level of technological literacy of pre-university students
- Increase the level of understanding of the needs of educators among the engineering community
- Identify ways that engineers
  - Can assist schools
  - Can assist school systems
In November, the IEEE Robotics and Automation Society – Egypt Chapter organized **Minesweepers: Towards a Landmine-Free World**: 1\(^{st}\) international outdoor robotic competition focused on humanitarian demining.

21 teams from around the world constructed a teleoperated/autonomous unmanned ground/aerial vehicle able to search for underground anti-personnel mines and aboveground unexploded ordnances.

Winners: EMAR (individuals), Minebusters (German University inn Cairo), The Rabbite (Misr University for Science and Technology), MineDragon (Creatokids) and Kids Finder Robot (IDEL School).
Hackathon

- Program supported by TAB
- Test program conducted at Drexel University in November. 4 programs, plus possible 5th site, to be carried out
- Upcoming programs organized by IEEE Chapters
Chapters and Sections Working in Close Cooperation

Enrique Tejera, IEEE SM
• IEEE Organization
• How Technical Societies and Regional Organizations Interact
• Definitions
• Actions from Sections / Regions / Societies to promote Chapters Activities
• Sections and Chapters Obligations
• Financial Resources for Sections and Chapters
• Panama Section Experience
• Recommendations and suggestions on how chapters and sections can provide benefits to the membership
IEEE Organization

- Technical Activities Board
- Divisions
- Technical Societies
- MGA
- Regions
- Areas
- Sections
- Chapters
- Affinity Groups
  - Sub-Sections
  - Student Branches
  - Council
- SB Chapters
- SB Affinity Groups
- Parents - WIE, Consultants, GOLD,
“Sections. A Section shall be the basic operating geographic organizational unit of IEEE and shall be constituted by a minimum of fifty (50) members. A Section shall be established with the approval of the Regional Activities Board by petition of those who live/work in relatively close proximity to be served by activities that further the missions of IEEE”.
- IEEE Bylaws

“Chapters. A Chapter shall be a technical subunit of a Region, one or more Sections or a Geographic Council. A Chapter shall comprise a minimum of twelve (12) members of a Society, or group of Societies and shall be established by petition to the parent geographical and technical organizational units concerned to fulfill the mission of IEEE”.
- IEEE Bylaws

“A Chapter is a technically-oriented organizational unit... formed to promote the interests of Section Members in a specific technical area associated with one or more of the IEEE Societies.”
- TAB Operations Manual
Definitions
What is an IEEE Section?

Section

• A group of members in a defined area in an IEEE Region
• Requirements for formation – 50 IEEE members
• Validity – Minimum of 25 IEEE members in one year
• Activity – Minimum of five (5) activities per year
• Information – Secretary and Treasurer Reports
• All Section Chairs are voting members in the Regional Committee
• Resources - Region, Societies, Section/Chapter Support, Sites IEEE Web-Sites
Definitions

What is an IEEE Technical Chapter?

Chapter

- A group of members of an IEEE society in an IEEE Section
- Requirements for formation – Minimum of 12 members of an IEEE society
- Validity - Minimum of 10 members of the society in one year
- Activity – Minimum of two (2) activities per year
- Information – Activities Reports
- Responsibilities – The Chapter Chairs are voting members in the Sections boards.
- Resources - Section, Societies, Region, Section/Chapter Support, IEEE Web-Sites
How the Section can help?

Section

• Provide forums during technical activities of the section where chapters can present their own activities.

• Encourage Chapter activities.

• Provide lists of distinguished lecturers to the chapters.

• Coordinate meetings with representatives of the industry who can support chapters activities.
SECTION

• Promote join meetings with other technical and professional organizations.

• Organize workshops, tutorials and other programs to help chapters in their performance.

• Explore the utilization of technical an economical resources.

• Develop specific technical projects to get funding and resources from IEEE, Societies, Region...
How the Section can help?

• Promote the formation of chapters facilitating resources for the development of technical and professional activities.

• Create and maintain up to date the WEB site to maintain the membership informed about activities and resources.

• Plan and prepare schedule of activities to avoid conflicts between chapters activities within the section.

• Recognize volunteers with awards and recognitions programs well defined.
IEEE Organization

- TAB
- Divisions
- Societies
- MGA
- Regions
- Sections
- Chapters
How the Region can help

REGION

- Attend major Section and Chapters Activities.
- Keep contact with all Sections and chapters regularly.
- Program formation and training workshops.
- Program technical conferences for Sections and Chapters.
- Help the Sections and Chapter to program their Web Sites.
- Provide lecturers and incentive Sections and Chapters to get involved in Technical and Professional Activities.
- Provide special funds and awards when necessary.
How the Societies can help

SOCIETIES

• Maintain contact with all Sections and Chapters regularly.

• Provide lecturers for Chapters and Joint chapters.

• Motivate membership to participate in the Section and Chapters activities.

• Encourage Chapters and Sections to co-sponsor activities.

• Promote joint activities with other technical organization
How the Societies can help

SOCIETIES

• Promote the development of technical programs that can generate their own resources.

• Motivate the chapters to use the Distinguished Lecturer Program.

• Coordinate Technical Activities with Sections and Chapters.

• Provide financial resources for Chapters and Sections.

• Program Training workshops for the formation of champions.
Chapter and Section Obligations

• Attend Section Congress (Section Chair or Chair Elect).

• Motivate the Activities in the Chapters (Technical Activities Coordinator)

• Coordinate activities with the student branches (Student Activities Coordinator)

• Guide the student branches to use IEEE resources (Student Activities Coordinator)

• Coordinate the membership development Activities (Membership Coordinator)
Chapter and Section Obligations

- Develop, implement and activate Affinity group such as WIE, Young Professionals and others (Membership Coordinator).

- Use IEEE Data Base and motivate membership to participate in activities (Membership Coordinator).

- Document and keep up to date section By Laws (Section Chair).

- Call to elections, promote nominations in accordance with section rules (N&A Coordinator).
Chapter and Section Obligations

• Recognize Members, Fellows, Seniors, Excellence, Dedication and Work for the Section/Chapter (Awards Coordinator).

• Communicate to the membership the Section, Chapters and Student Branches events (Communications Coordinator).

• Communicate to the membership information related to the Section (Communications Coordinator).

• Create and keep up to date WEB site with important links and information including schedule of events (Communications Coordinator).
Financial Resources for Sections and Chapters

- The Section receives $2,000.00 (Annual) for completing a minimum of 5 activities and maintaining a membership of at least 25 members.

- The Section receives $3.00 (Annual) for each active member (M, S, A); $1.5 AF and $4 for SM or F.

- Subsections receive a $500 rebate. Requires financial report included in section's report, 5 meeting per year and a minimum of 15 active members.

- The Chapters receive $200.00 (Annual) completing a minimum of 2 activities and maintaining a membership of at least 10 members.

- Affinity groups receive also a $200 Rebate when complying with minimum criteria of activities.
Panama Section Experience

The section counts with 485 members

240 Professionals

245 Students

49 Senior Members

Under IEEE classification it is considered as a small Section

Technical Chapters  5  - PES / IAS / Computer / Communications / EMBS

Student Branches  5  - U Latina / USMA / UP / UTP / OTEIMA

Affinity Groups  3  - Life Members / Young Professionals / WIE

Section Committees
Financial Resources for Sections and Chapters

• The Section receives a bonus of 10% (Annual) for the submittal of annual reports (Activities + Financial) on time. This is requirement for other bonuses.
• Sections reporting more than 10 meetings receive a bonus of $200 and Subsections a bonus of $100.
• The Chapters and Affinity Group with more than 6 technical activities receive additional $75.
• Several societies provide awards and recognitions in function of chapters performance during the year.
• Section and Chapters receive also special finance for technical activities and other important projects.
Panama Section Experience

Committees – Report to the Sections

- Membership
- Student Activities
- Awards and Recognitions
- Professional Activities
- Newsletters – NoticIEEEro
- IEEE and the Community
- IT, Vtools, Web
- Social Media
Panama Section Experience

SECTION

Manages all administrative functions

Office – Staff

Finances - Rebates – Bank Accounts

Training

Reports

Major Events

Nominations for awards and recognitions

Participation in IEEE Regional and worldwide contests
The Panama Section was awarded the 2013 Outstanding Small Section
Panama Section Experience

CHAPTERS

Manage Technical Programas
Distinguished Lectures from Societies
Seminars
Technical Visits
Participate / Use Society Programs
  Awards
  Contests
Recommended and Suggestions

• Investigate and identify what are the chapters needs.
• Revise the resources offered by IEEE and societies for the use of technical Chapters.
• Make use of the Distinguished Lecturers Programs.
• Establish training programs and workshops for the formation of champions in the sections.
• Identify where there is potential for the formation of new technical chapters and push them forward.
• Comply with the requirements of activities and reports to maintain the chapters active.
Recommendations and Suggestions

• Promote coordinating meetings between Chapters/Section for the activities programming.

• Establish working procedures where the chapters manage the technical aspects of the Section and the Section officers the administrative part.

• Establish programs to recognize and award for outstanding members in technical aspects in the Section.

• Promote a close relation between IEEE/Industry in the Section offering activities attractive for those companies.