Section Operations

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(Presentation prepared by Vicki Waldman, IEEE)
Agenda

- General Overview...Geographic Unit Relationships
- Governance
- Required Reporting
- Best Practices
- Elections
- Volunteer Recruitment Website
General Overview
Geographic & Technical Unit Relationship

Technical Activities Board
- IEEE Societies

Regional Activities Board
- Regions
  - Areas
  - Sections
    - Chapters
    - Affinity Groups
    - Council
      - Student Branches
      - SB Chapters
      - SB Affinity Groups

Parents - WIE, Consultants, GOLD
<table>
<thead>
<tr>
<th>Geographic Units</th>
<th>2004</th>
<th>2005</th>
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<td>Regions</td>
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<td>Areas</td>
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<td>Sections</td>
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<td>Student Branch Affinity Groups</td>
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## Geographic Units in Region 1 at year-end 2005

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<td><strong>Total</strong></td>
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Why do we have Sections?

- Ideal vehicles for informative local technical & professional meetings and for networking.
- Meetings are one of the most visible & valuable ways in which Sections, Chapters, and Affinity Groups serve their members.
- Successful meetings help to achieve the goals of education & professional advancement that are basic to all IEEE Units.
- Provides a uniform way to manage IEEE business & maintain a healthy environment for membership retention and growth.
Geographic Unit Relationships

- Regions oversee Sections
- Sections oversee Subsections, Chapters, Student Branches and Affinity Groups
- Councils are comprised of Sections, and exist at the pleasure of the member Sections
- Some Councils (but not all) have Chapters and Affinity Groups, and therefore oversee them
Geographic Unit Relationships

- Affinity Group Parents also oversee Affinity Groups
  - Women In Engineering (WIE)
  - Consultants’ Networks
  - Graduates Of the Last Decade (GOLD)
  - Life Members (approved by RAB in June)
- Student Branches oversee Student Branch Chapters
- Societies also oversee Chapters and Student Branch Chapters
Section Governance
RAB Mission

- Serve the needs of the members of the IEEE by maintaining, enhancing, and supporting the geographical organizational units of the IEEE.

- Responsible for IEEE membership & member development.
  - Membership includes, recruitment, development, administration of admissions, retention, elevation, and service, as well as related operational and budget issues.
  - Member development includes member value development, new member programs and services and support for members’ careers, in collaboration with other IEEE Organizational Units.
RAB Operations Manual

- Developed in 1998 when the IEEE Bylaws were modified
- Should be the primary resource for all geographic units officers

Other sources of information
- IEEE Bylaws
- IEEE Policies

www.ieee.org/rabopsman
RAB Operations Manual

- **Section on Geographic Organizational Units**
  - In the process of being revised to implement Powers Reserved Concept
  - Delegate items to the Region Directors and/or geographic units (i.e. Region Director (or Region Committee) will be able to approve Section name change
  - Will also include information on responsibilities, authorities & accountabilities of geographic units
Section Operations

- All Sections are required to operate according to the RAB Operations Manual – are not required to have Bylaws.
- Sections are allowed to have an addendum or separate governance document.
  - Region Director approves if there are no conflicts with RAB Operations Manual.
  - Exceptions/conflicts must be presented to RAB.
Section Operations Manual

- Provide logistical information for management of Section
  - Vendors or venues used
  - Handling of reimbursements
  - Officer transition
  - Newsletter & web page management
  - And more . . .

- RAB Staff have examples available
Required Reporting

(www.ieee.org/web/geo_activities/rab/scs/Required_Reporting/index.html)
Reports

- In order to receive funding from RAB, units must submit the following:
  - Financial Report
  - Officer Report
  - Meeting Reports (all units)
    - Section, Subsection, Technical Chapters & Affinity Groups
- All financial activity & officers should be reported through the Section, including that of subunits
- 10% bonus if all reporting submitted no later than end of third week in February
Financial Report (L-50)

- Complete the hard copy or the Excel spreadsheet (Excel spreadsheet is recommended)
  - http://www.ieee.org/scsreports
- Accounts for all financial activity
  - Expenses
  - Revenue, including investments
- Responsibility of Section Chair/Treasurer
- Include all unit & subunit data in one L-50 (preferred)

For questions: financial-report@ieee.org
Officer Confirmation Reports

- Even if there are no changes, must report officers on annual basis
  - IEEE Membership must be current.
  - Membership Grade – Graduate Student, Member, Senior, and Fellow grades qualify
  - Must reside in the geographic area.
  - Chapter Officers - must be a member of the Chapter's Society. Joint Chapters only required to be a member of one of the Societies.
Meeting Reports

- Submit electronically (www.ieee.org/L31)
  - Can be submitted at any time but the unit will not receive credit for meetings reported after their rebate has been distributed.
  - Can be queried for meeting topic ideas

- Report all Meetings

- Revised Categories
  - Technical (Educational Topics, Tutorials)
  - Non-Technical (Professional/Career, Social)
  - Administrative (ExCom Meetings)
Meeting Reports

- Meetings held by a Chapter or Affinity Group, or Joint Chapter or Affinity Group, of a Section may be counted by the Section
  - Each unit submit a report both get credit for the meeting
  - Joint Chapter meetings (where the Chapter is joint with two or more Sections) will be credited to the administrative (parent) Section
Meeting Requirements

- Sections & Subsections
  - At least 5 technical, non-technical or administrative meetings

- Chapter
  - At least 2 technical meetings

- Affinity Groups
  - At least 2 technical, non-technical or administrative meetings
Elections
Nominations Process

- Very important to conduct elections for Section/Chapter officers
- Appoint Nominating & Tellers Committees (No officers & No potential candidates)
- Identify Candidates - Confirm candidate is willing to serve if elected
- Two + candidates per office, if possible
- Announce slate to membership 60 days prior to Election
Term Limits and Restrictions

- Typical Term limits are for 1 year, eligible to serve up to 2 more years.
- Unit Chair cannot serve also as Unit Treasurer
- No Section expenditures permitted in support of any candidate
Election

- **Ballot**
  - Includes final slate of candidates
  - *Must* be made available to *all* members
  - Mail is the preferred method
  - Web-based balloting acceptable, but
    - Need to verify that only eligible members are voting

- **Ballot return deadline**
Results of Election

- Tellers Committee Chair reports results to the Section ExCom
- Announce the results in the Section newsletter
- Provide officer list to IEEE (http://www.ieee.org/web/geo_activities/rab/scs/Required_Reporting/Officerforms.html)
- Schedule a transition meeting between newly elected and incumbent officers
- Prepare to honor the outgoing officers
Best Practices
Best Practices

- **Communication**
  - Establishing good email links to the members
  - Send meeting announcements on the 1st of every month & send special announcements throughout the year
  - Setup a good web site with calendar, newsletter, and web page content that can be managed by the Chapter and Committee Chairs with no programming or HTML knowledge required.
  - Have regular section meetings & use them as anchors for the chapter meetings.
Best Practices – Industry Relations

- Have technical meetings every month at lunchtime. The meetings are always in the same location & the day of the month.
  - Invite business leaders to these monthly meetings.
Best Practice – Meeting Attendance

● In communicating with Members, always remember to emphasize the networking opportunities to be had at meetings. (North Jersey Section)

● When planning a meeting, look at current news events & try to recruit a speaker who can address the topic in a pertinent fashion. (Oregon Section)

● Have the meeting announcements printed in the newsletters of other local technological organizations. (Syracuse Section)

● Invite members new to your Section to eat free at the first dinner meeting they attend. (Erie Section)
Recruitment of Volunteers
Volunteer Recruitment Toolkit

- Developed based up feedback from Personal contact project
  - Most common issue was volunteer recruitment
- Provides references in one place on IEEE web, virtual community
Intended Audience

- Any IEEE geographic unit recruiting volunteers
  - Sections
  - Chapters
  - Affinity Groups
Key Components of Kit

Located on IEEE web
www.ieee.org/vol-recruit

- Officer job descriptions
- Customizable brochure
- One-page flyer
- Recruiting tips
- Recognition tips
- Presentation based on recruiting tips
Online Communities
IEEE Online Communities

- An Online Community consists of a group of individuals that have a shared purpose or common interests.
- Utilize online communication and collaboration tools to facilitate the accomplishment of their goals or to fill voids that may currently exist by relying solely on in-person or real-time interactions.
- Online Community Members are engaged in value-creating relationships with "anytime/anywhere" access to shared knowledge.
IEEE Online Communities

- Over 95 IEEE Online Communities
- 21 Regionally Focused Communities
  - IEEE New Hampshire Section
  - IEEE Eastern North Carolina Section
  - IEEE Latinoamerica – Region 9
  - IEEE Region 2 Leadership Forum
  - IEEE Nigeria Section Computer Society Chapter Forum
  - IEEE Ramas Estudiantiles de Consejo Mexico IEEE
  - Region 8 Student Forum
  - IEEE Region 8 Industry Relations Forum
  - IEEE Region 9 Student Forum
  - IEEE Section-Chapter Volunteer Forum

www.ieeeecommunities.org
Section/Chapter Volunteer Forum Online Community

- For leaders and volunteers in IEEE Sections, Chapters, Affinity Groups
  - Discussion threads
  - Polls
  - Calendars
  - Contributions and files

www.ieeecommunities.org/section-chapter_vol
Thank You
Additional Resources/Contacts
Unit Formations

- Petition to form
  - Section, Subsection, Council, Chapter, Affinity Group
- Verification process
- Notification
  - Geographic, Technical or Affinity Group parents

Contact Lauren Leaston, l.leaston@ieee.org,
+1 732 562 5511
www.ieee.org/scs (link for Unit Formation)
Geographic Roster

- Lists all Region, Section, and Council officers as reported to IEEE Staff
- Access:
  - Must have IEEE web account
  - must be listed in the Roster
- Data extracted from IEEE member database
- Updated every two weeks
- Update at:
  http://www.ieee.org/web/geo_activities/rab/scs/Required_Reporting/Officerforms.html

Contact  Lauren Leaston, l.leaston@ieee.org,
+1 732 562 5511
www.ieee.org/roster
Contiguous Section Members

Contiguous Section Membership

- Member of adjoining Section
- Form available on web or for email attachment
- Flag can only be removed manually

Contact Lauren Leaston, l.leaston@ieee.org,
+1 732 562 5511
www.ieee.org/scs (click on FORMS)
Communication Vehicles

- **SCOOP** – monthly newsletter
  - IEEE news for Section, Council, Subsection and Area Chairs and Treasurers; Newsletter Editors and Webmasters
  - Distribution list updated from submitted officer reports
    
    www.ieee.org/scoop

- **Section Chapter Support web pages**
  - Information and forms for Unit officers
    
    www.ieee.org/ra/scs

**Contact** Vicki Waldman, v.waldman@ieee.org,
+1 731 562 5564
Administrative Training
PowerPoint Presentations

- IEEE Section Management Orientation
- Financial Management
- Treasurer Training Program
- Recognition for IEEE Sections and Chapters
- Section Newsletters
- Educational Activity Resources

Currently being updated – contact RA staff if you need additional information
Recognition Products & Supplies

- Supplies
  - Letterhead & envelopes

- Recognition Products
  - Banners (customizable)
  - Plaques, certificates
  - Officer pins (by grade, position)
Recognition Products & Supplies

- For volunteers
- Billing
  - Rebate & Concentration Banking deductions preferred
    - Treasurer or chair approval needed
  - Invoicing available

Contact Donna McClelland, d.mcclelland@ieee.org
+1 732 562 5518
www.ieee.org/scsproducts
E-Notice

- Electronic newsletter subscription service
  - Facilitates newsletter, meeting notice distribution
  - Derived from membership database
  - Automatic updates
  - Staff handles bounced messages
  - Delivery statistics provided
  - Unit must register for this service

Contact Vera Sharoff, v.sharoff@ieee.org,
+1 732 562 5509
www.ieee.org/enotice
Entity Web Hosting

- Over 1,080 Geographic Units participating in program
- IEEE provides system administration of Web server
- URL redirects available on request

Contact Khanh Luu, ewh@ieee.org
+1 732 562 6358
http://ewh.ieee.org/
GOLD

- Young Professionals
  - Identified on SAMIEEE
  - graduated within last ten years
- Peer connection
- Local social activities
- Leadership opportunities

Contact Cathy Downer, c.downer@ieee.org,
+1 732 562 5506
www.ieee.org/gold
Student Services

- Student Branch and Student Branch Chapter Support
  - Annual reports, rebates/allotments
  - Entity Web hosting for Student Branches
  - Recognition and Professional Awareness Programs
  - SAMIEEE access for Student Branch Counselors and SB Chairs

- *Potentials* Magazine
Student Services

- Student web application
  - All students can join IEEE online
  - Instant access to online services
  - Branch Counselor endorsement is no longer required
  - Self-certification required by student applicants

Contact Laura Durrett, student-services@ieee.org
+1 732 562 5523
www.ieee.org/students
Membership Development

- MD Programs
  - Member-get-a-Member/Student-get-a-Student, [www.ieee.org/mgm](http://www.ieee.org/mgm)
  - Nominate a Senior Member (Sections), [www.ieee.org/nsmi](http://www.ieee.org/nsmi)
- Recruitment programs and tools, [www.ieee.org/mdprogrms](http://www.ieee.org/mdprogrms)
Membership Development

- Membership Development Progress Report – monthly newsletter
  www.ieee.org/mdprogrpt
- Membership statistics
  - Mailed monthly to MD Chairs
- MD supplies – applications, posters
  www.ieee.org/organizations/rab/md/mdsupplyform.html

Contact Mike Binder, m.binder@ieee.org
+1 732 562 5514
Regional Activities Policy, Administration

- Questions on RA Operations/Policy
  - Cecelia Jankowski, Managing Director Regional Activities
    - c.jankowski@ieee.org, +1 732 562 5505
  - Dan Toland, Manager – RA Administration
    - d.toland@ieee.org, +1 732 562 5515
What Is The IEEE Master Brand?

- The IEEE Master Brand is the Board-approved symbol of the IEEE.
- IEEE Board of Directors has requested that all units use the correct version of the Master Brand
- It includes the IEEE logo – the diamond shaped emblem with the right-hand rule -- and the letters I-E-E-E.
- It has pre-set proportions and cannot be created by simply combining the two components.

The IEEE Master Brand looks like this.
Why Is Consistent Use of the IEEE Master Brand Important?

• The IEEE Master Brand helps to
  • Build recognition for the IEEE;
  • Enhance the IEEE name and reputation of technical excellence;
  • Introduce the IEEE to potential members and customers; and
  • Protect the IEEE name and logo from trademark infringement.
IEEE Master Brand Dos and Don’ts

- Do use the version that looks like the one at the bottom of this page.
- Do download the latest version from www.ieee.org/masterbrand
- Do refer to the IEEE Identity Standards for usage guidelines (www.ieee.org/identitystandards)
- Don’t use out-of-date logos.
- Don’t animate the Master Brand.
- Don’t use it instead of the letters I-E-E-E in the name of your IEEE organization.
Other IEEE Departments

- Educational Activities
  www.ieee.org/organizations/eab/

- IEEE Publications

- Conference Services
  www.ieee.org/conferences/

- Standards Association
  http://standards.ieee.org/

- Technical Activities
  www.ieee.org/organizations/tab