

Regional Activities and Technical Activities: Working Together for Chapters

**www.ieee.org/chapters
www.ieee.org/scs**

Chapter Support Staff

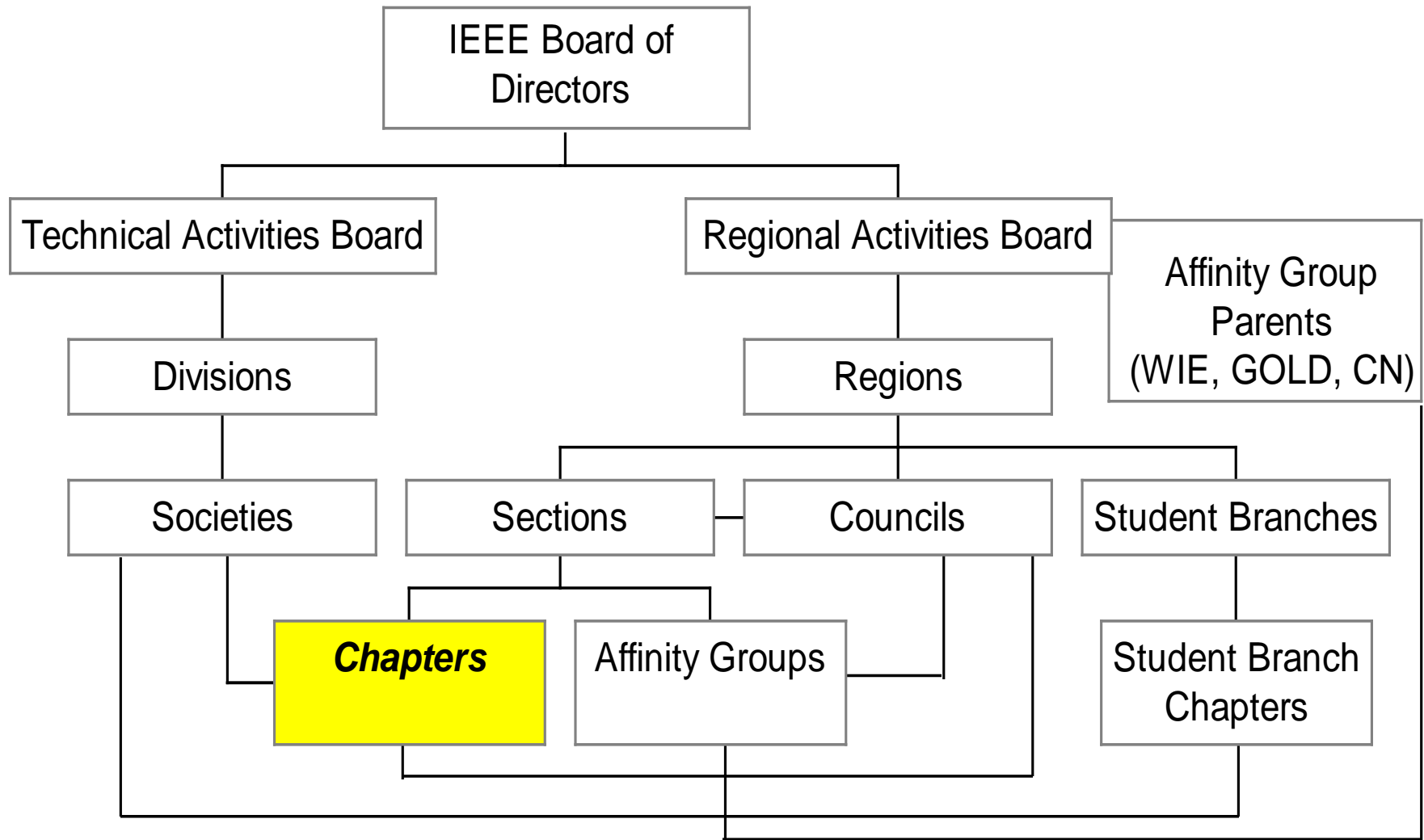
**Tracy Hawkins,
Manager, RAD
Section/Chapter
Support**



**April Nakamura,
TAD Society
Chapter
Coordinator**

RAD - TAD

Geographic & Technical Unit Relationships



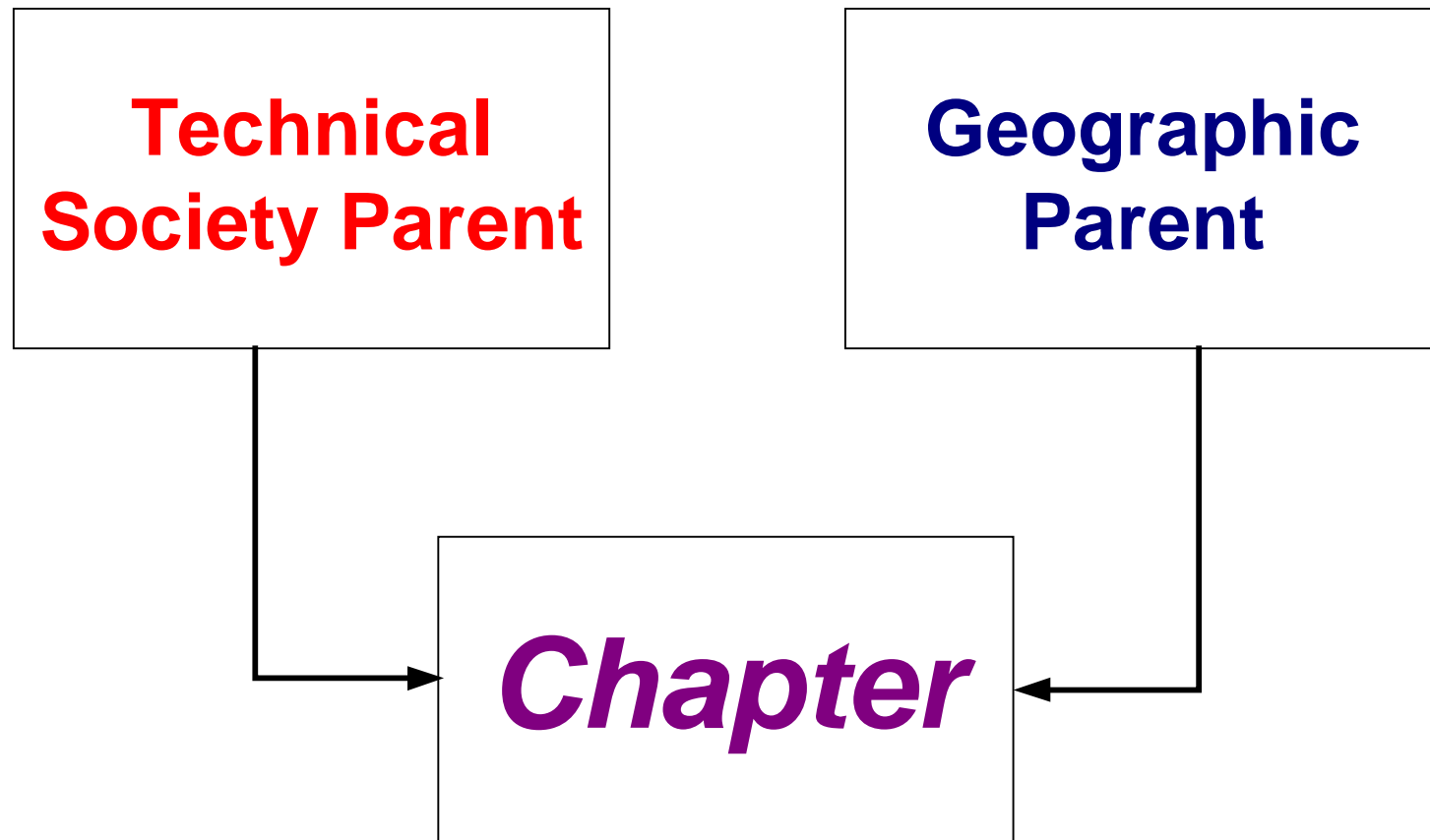
Geographic Unit Relationships

- Regions oversee Sections
- Sections oversee Subsections, Chapters and Affinity Groups
- Councils are comprised of Sections, and exist at the pleasure of the member Sections

Geographic Unit Relationships

- Some Councils (but not all) have Chapters and therefore oversee them
- Student Branches oversee Student Branch Chapters
- Societies also oversee Chapters and Student Branch Chapters

Simply put:



Some ComSoc Statistics

- 151 Chapters worldwide in 2003
- 631 meetings/conferences (average 4.1 meetings/year/Chapter)
- Average attendance at each ComSoc Chap meeting: 30 Members, 18 guests

Did you know?

- Chapters can earn a \$200 rebate annually through the Section.
- Chapters can earn a bonus by having 6 or more technical, educational or professional meetings
- Chapters operate under the Bylaws of the Section.

Did you know? P. 2

- A review of the Section's bylaws may address many questions of how a Chapter should be operating.
- Chapters are permitted to have a separate bank account.
- Chapters are encouraged to use the Concentration Banking Program

To Form a Chapter

- 12 IEEE members (no students or affiliates) of the Society sign a formation petition.
- Joint Chapter formation petitions must include at least three (3) members of each Society.

To Form a Chapter, P.2

- Joint Section Chapters have one (1) parent Section.
- Section must approve formation.
- Society must approve formation.

Joint or not?

- To change the status of an existing Chapter:
NO PETITION NEEDED!
- Submit written request through Section(s),
include:
 - details of requested changes
 - name of organizer
- staff obtains approval from Region Director
and Society President

To be a Chapter Chair

- Member, Senior or Fellow grade membership
- Member of the Society.
- Familiar with the requirements of the Chapter Officer and Committee Chairs' positions.



Is that in my job description?

A Chapter Chair's Duties

- Responsible for the operation of the Chapter.
- Responsible for determining the needs of the members of the Chapter.

Chapter Chair Duties, P. 2

- Presents plans for meeting the members' needs to the Chapter Executive Committee for approval.
- Presides at meetings of the Chapter and the Chapter Executive Committee.

Chapter Chair Duties, P. 3

- Presents appointments of Chapter Committee Chairs to the Chapter Executive Committee for approval.
- Responsible for assuring that Chapter Officers and Committee Chairs are properly trained.

Chapter Chair Duties, P.4

- Represents the Chapter at Section Executive Committee meetings and at Administrative Committee meetings of the Society.
- Responsible for conducting the annual Chapter Election.



Financial Management

Chapter Funds

- IEEE Regional Activities Department
 - \$200 for Chapters in compliance
 - \$4/per Senior Member or Fellow; \$3/Member or Student; \$1.50/affiliates
 - \$75 bonus for 6 or more tech/ed/prof mtgs
 - Payment combined with Section's rebate
 - Contact Section Treasurer for information about funds.

Chapter Funds, P.2

- If a separate bank account is needed:
 - U.S. Chapters use Concentration Banking
 - Have a Section officer's signature on bank account too.
 - At least 3 officers should have access to the account.
 - Financial activity & bank statements to Section Treasurer for annual report

Donations

- IEEE Policy permits Chapters to accept donations for activities of scientific or technical nature
- “Solicitation” must be approved in advance by IEEE Executive Committee
- Donations TO any organization must be approved in advance by IEEE Executive Committee

Donations

- For more information on IEEE policies relating to contributions, grants, and the IEEE Foundation, contact IEEE Development Office staff:
 - supportieee@ieee.org
 - www.ieee.org/foundation

Society Funding of Chapters

- Many IEEE Societies provide funding to their Chapters. This is in addition to the IEEE Section Rebate.
 - In general, the chapter is required to report directly to the Society,
 - In general, most societies are satisfied with a copy of the L-31 report.
 - Regular funding ranges from \$50 to \$500 per chapter per year.

Society Funding of Chapters

- Special Award funding or special subsidies for conferences and events can be as much as \$2000.
- Societies may fund Chapter travel expenses for certain events.
- Chapters should report receipt of Society funds to their Sections.



Required Reporting



Meeting Reports

- Chapter Secretary submits meeting and officer reports to Section Secretary
- Minimum 2 technical meetings/year
- Also report other categories:
 - professional
 - educational
 - administrative
 - social

Meeting Reports

- Online reporting available:
 - www.ieee.org/L31
 - Utilize “email copy” feature
 - Section Secretary
 - Society contact
 - Print a copy for your records

Reporting

- Financial activity must be reported to the Section Treasurer.
- Reports to due to Section by 1st week in February.
- 3 years of no meeting reports may mean dissolution of Chapter

We Get Upset When . . .



- You don't submit
 - Officer Reporting annually
 - change of Chapter Chair

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Holding Successful Meetings

- Select a subject
 - What interests your members? Ask!
 - Do not limit subject matter - related fields may be appropriate and of interest
- Select a format
 - Seminar, tutorial, conference, lecture?

Holding Successful Meetings

- Find a good speaker
 - Distinguished Lecturers Program
 - Authors
 - Local colleges and universities
 - Local professional associations
 - Corporations in your area
 - Other Chapters

Holding Successful Meetings

- Logistics: location and schedule
 - convenient and accessible
 - sufficient parking
 - regular schedule of meetings
 - plan ahead for whole series, 6 months or a year

Holding Successful Meetings

- Plan a social dimension
 - allow time for socializing
 - provide for networking
 - refreshments

Holding Successful Meetings

- Publicize the meeting
 - bulletin boards
 - internal mail
 - Section communications
 - email
 - newsletters

Distinguished Lecturers Program

- What is the Distinguished Lecturer(DL) Program?
 - A personal visit to a Chapter from a “distinguished” lecturer.
 - Offered by Societies/Councils.
- How do Chapters benefit?
 - Outstanding technical content at a meeting.
 - Visit counts towards meeting requirements.
 - Opportunity to expand the Chapter.

<http://www.ieee.org/lecture>



Distinguished Lecturers (cont.)

- 32 Societies Participate
 - Many allow any IEEE entity to make use of their program.
 - There are over 500 lecturers currently on the list.
 - Joint Chapters benefit in particular.
- Arrangements should be made directly through the sponsoring Society.

Distinguished Lecturers (cont.)

- Each Sponsoring Society/Council Coordinates its own program.
 - Maintain a list of Speakers
 - Program Coordinator
 - Funding Determined by the Society
 - Determine which entities are eligible to request a speaker.

Distinguished Lecturers (cont.)

- **In general**, the Societies do not set restrictions on where or to whom the lecturers may speak.
- **In general**, Societies only pay expenses for a lecturer who is traveling to one of its Chapters.
- **In general**, Societies will do all they can to “share the wealth”

Distinguished Lecturers (cont.)

- Reaching out to your Section
 - Section membership should be invited to DL programs.
 - Provides an opportunity to explore new areas of technology.
 - Improve relationship with Section Leadership
 - Increase attendance.

DLs without Travel Expense!

- Microsoft Office Live Meeting software allows Internet conferencing for a minimal fee (\$50, plus phone charges).





www.ieee.org/web/webconf

How do I find out about DLs?

www.ieee.org/lecture

www.ieee.org/chapters

Address  <http://www.ieee.org/organizations/tab/cha/lectweb2.html>



IEEE HOME SEARCH IEEE SHOP WEB ACCOUNT CONTACT IEEE

Membership Publications Services Standards Conferences Careers/Join

[Chapter Coordinator Roster](#)
[Create a New Chapter](#)
[Chapter Funding Guide](#)
[Distinguished Lecturer Program](#)
[Electronic Distinguished Lectures](#)
[Chapter Briefs Archive](#)
[IEEE Useful Links](#)
[Chapter Coordinator Retreat](#)
[IEEE Technical Activities](#)

» Local Activities

Distinguished Lecturer Programs

To access information on the Societies' distinguished lecturer programs, click on a Society name for a link to that Society's online Distinguished Lecturer information. You can also send a blank e-mail to the address listed and a prewritten text file will automatically be sent to you in response. The text file contains the names of lecturers currently available from that Society, the Society's rules for obtaining the lectures and directions for contacting them.

To receive the entire list below in e-mail format, send a blank message to: info.distlec@ieee.org

[IEEE Distinguished Lecturer Program Overview](#)

IEEE Aerospace & Electronic Systems Society info.distlec.aes@ieee.org	IEEE Lasers & Electro-Optics Society info.distlec.leo@ieee.org
IEEE Antennas & Propagation Society info.distlec.ap@ieee.org	IEEE Magnetics Society info.distlec.mag@ieee.org
IEEE Broadcast Technology Society info.distlec.bt@ieee.org	IEEE Microwave Theory & Techniques Society info.distlec.mtt@ieee.org
IEEE Circuits & Systems Society info.distlec.cas@ieee.org	IEEE Neural Networks Council info.distlec.nn@ieee.org
IEEE Communications Society info.distlec.comm@ieee.org	IEEE Nuclear & Plasma Sciences Society info.distlec.nps@ieee.org

Alternate IEEE Sources for Lectures

- IEEE Educational Activities
 - <http://www.ieee.org/organizations/eab/icet/presentations.htm>

The screenshot shows a web browser window with the title "» Education" in the top left corner. Below this is a blue header bar with the ICET logo on the left and the text "IEEE Center for Education & Training" in large, bold, blue font. Underneath the header is the word "Presentations" in bold blue font. A paragraph of text reads "Online aids for your educational needs." Below this is a white box with a blue border. Inside this box, on the left, is a blue circle with a white question mark. To its right is the section title "Audio/PowerPoint Presentations" in bold. Below the title is a list of three presentation titles: "Bargain Hunting in the No Free Lunch Mall of Complex Systems", "Recent Advances in Convex Optimization", and "Shaping the State of Non-Linear Systems". To the right of this list is a vertical scrollbar. Further to the right, a text block states: "Audio/powerpoint presentations will introduce you to new technologies." At the bottom left of the white box, there is a small blue circle with a white question mark.

» Education

ICET **IEEE Center for Education & Training**

Presentations

Online aids for your educational needs.

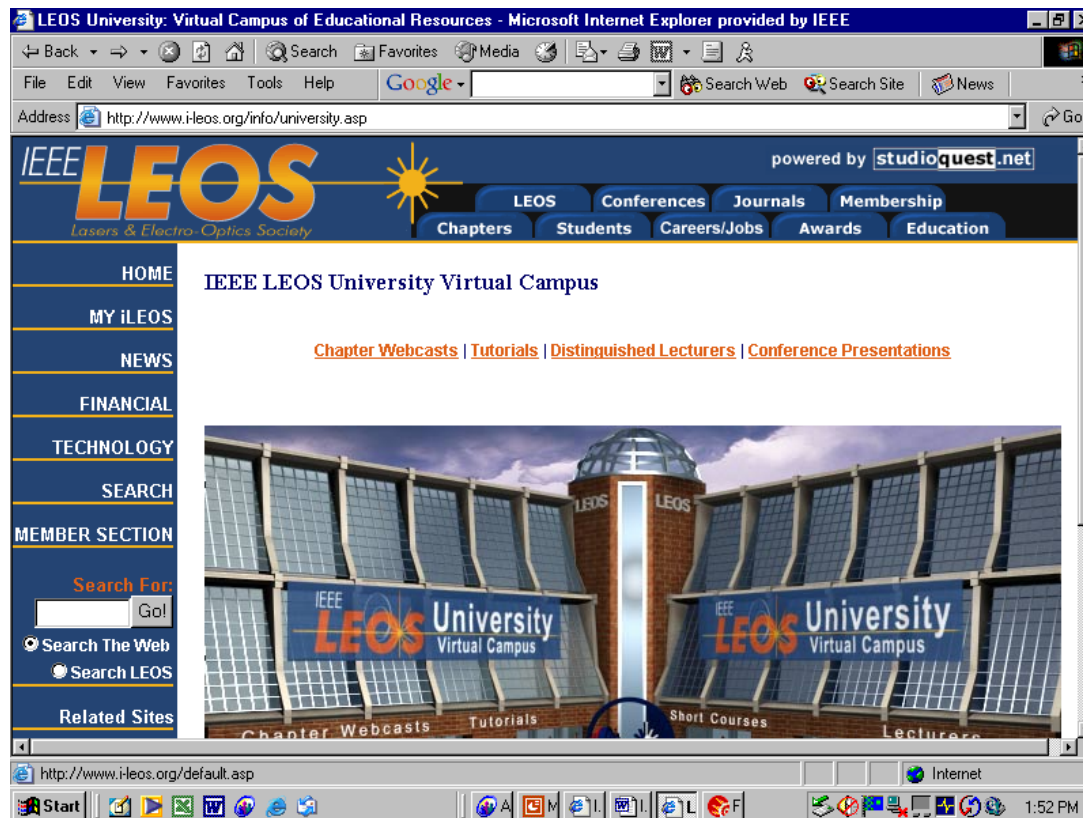
Audio/PowerPoint Presentations

Bargain Hunting in the No Free Lunch Mall of Complex Systems
Recent Advances in Convex Optimization
Shaping the State of Non-Linear Systems

Audio/powerpoint presentations will introduce you to new technologies.

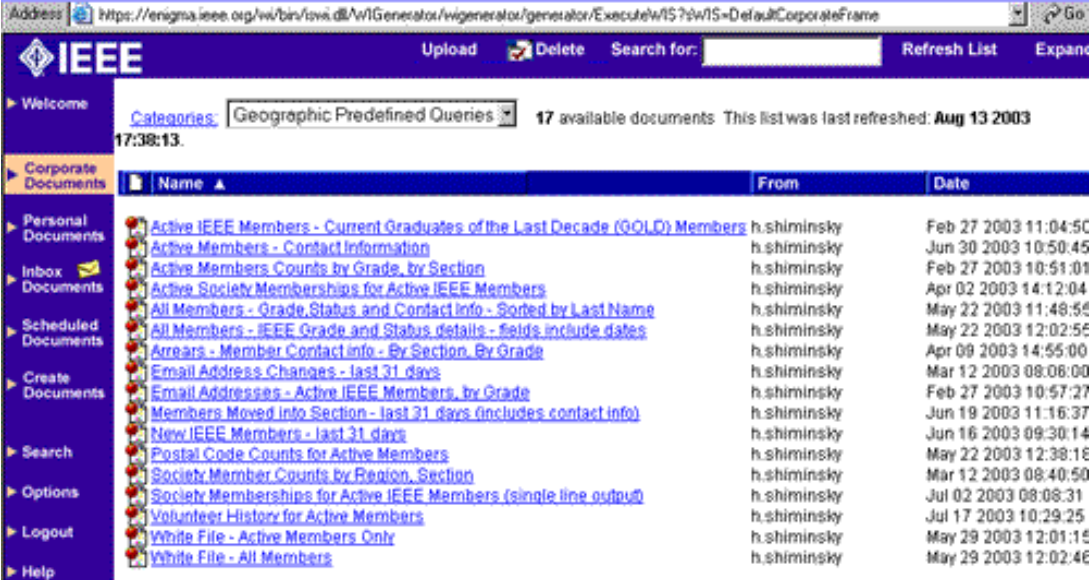
Alternate IEEE Sources for Lectures

- IEEE Society Lectures Online



Membership Information

- You can access IEEE's membership database at: www.ieee.org/samiee
- Training available via internet conference.
- Pre-defined queries are ready for your use!



The screenshot shows a web browser window with the URL <https://enigma.ieee.org/wi/bin/owa.dll/WiGenerator/wigenerator/generator/ExecuteWIS?wWS=DefaultCorporateFrame>. The page features the IEEE logo and a navigation menu on the left with options like Welcome, Corporate Documents, Personal Documents, Inbox, Scheduled Documents, Create Documents, Search, Options, Logout, and Help. The main content area displays a table of predefined queries under the heading 'Categories: Geographic Predefined Queries'. The table has columns for Name, From, and Date, and lists 17 available documents. The last refresh date is Aug 13 2003.

Name	From	Date
Active IEEE Members - Current Graduates of the Last Decade (GOLD) Members	h.shiminsky	Feb 27 2003 11:04:50
Active Members - Contact Information	h.shiminsky	Jun 30 2003 10:50:45
Active Members Counts by Grade, by Section	h.shiminsky	Feb 27 2003 10:51:01
Active Society Memberships for Active IEEE Members	h.shiminsky	Apr 02 2003 14:12:04
All Members - Grade, Status and Contact Info - Sorted by Last Name	h.shiminsky	May 22 2003 11:48:54
All Members - IEEE Grade and Status details - fields include dates	h.shiminsky	May 22 2003 12:02:55
Arrears - Member Contact Info - By Section, By Grade	h.shiminsky	Apr 09 2003 14:55:00
Email Address Changes - last 31 days	h.shiminsky	Mar 12 2003 08:06:00
Email Addresses - Active IEEE Members, by Grade	h.shiminsky	Feb 27 2003 10:57:27
Members Moved into Section - last 31 days (includes contact info)	h.shiminsky	Jun 19 2003 11:16:37
New IEEE Members - last 31 days	h.shiminsky	Jun 16 2003 09:30:14
Postal Code Counts for Active Members	h.shiminsky	May 22 2003 12:38:18
Society Member Counts by Region, Section	h.shiminsky	Mar 12 2003 08:40:50
Society Memberships for Active IEEE Members (single line output)	h.shiminsky	Jul 02 2003 08:08:31
Volunteer History for Active Members	h.shiminsky	Jul 17 2003 10:29:25
White File - Active Members Only	h.shiminsky	May 29 2003 12:01:15
White File - All Members	h.shiminsky	May 29 2003 12:02:46



IEEE

Newsletters

Newsletter Editors' Page

- All-Electronic Newsletters
- “Filler” articles
- Best practices
- SC 2002 Presentations on newsletters
- Links to Section newsletters for ideas

www.ieee.org/scs

Click on “Newsletter Editors” (left)

“All-Electronic” Newsletters

- Mostly electronic is reality
- One snail mailing to members each year required (at least thru Section)
- Four Steps
 - Prepare the membership
 - e-Notice Service
 - Monthly
 - Thru the Section

“Filler Articles”

- IEEE web accounts
- Update member records online
- IEEE Email aliases
- IEEE Online Store
- IEEE Travel Service Online
- Senior Member elevation process



IEEE

Recognition

Who should you recognize?

- Chapter officers
- Conference organizers
- Committee chairs
- Newsletter editors/web masters
- Newly elected Fellows & elevated Senior Members

But how???

- Newsletter article
- Web page
- Certificate
- Plaque
- Chapter Chair pins

Certificates

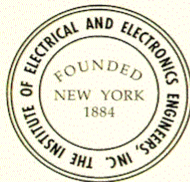


The **IEEE** is pleased to present this Certificate to

Professor Jane Doe

in recognition and appreciation of your valued
services and contributions as

a speaker at the New York Section
Technical Conference on Fuzzy Logic
28 August 1999



Barclay G. Insinger

Plaques



Chapter Chair Pins



Recognition Product Pricing

- Certificates
 - \$4 or \$5 depending on style
 - Customized – up to \$18
- Pins
 - \$20/each
 - Include member # to verify grade
- Plaque for engraving
 - \$18

Ordering Recognition Products

- Contact scs-products@ieee.org
 - or www.ieee.org/scs
 - Click on “Products”
- Can be purchased through deduction from annual Section rebate
 - Must be approved by Section Chair or Treasurer



Additional Information for Officers

Chapter Officer Support

- Chapter Formation
 - Chapter Opportunity Analysis
 - Petition Processing
- Entity Web Hosting
 - <http://ewh.ieee.org>
- SAMIEEE Access
 - Available online
 - Use IEEE web account

Chapter Officer Support

- Maintenance of Officer Reporting
 - *Regional Activities staff updates officer information on the main IEEE database*
- Recognition supplies:
 - officer pins
 - certificates of appreciation
 - plaques
 - banners

Web Publications for Officers

- *Program Resources Guide*
- *The SCOOP* newsletter
- Chapter Briefs newsletter
- Society Chapter Funding Guide
- Geographic Roster (password protected)

 links from www.ieee.org/scs

CONTACTS AND WEB SITES

- **Chapter Information**
 - www.ieee.org/chapters
- **Change Contact Information**
 - address-change@ieee.org
 - www.ieee.org/membership/coa.html
- **Concentration Banking and Investments**
 - concentration-banking@ieee.org
 - www.ieee.org/services/financial/treasury
 - +1 732 562 6837

CONTACTS AND WEB SITES

- **Section/Chapter Recognition Supplies**

Banners, Certificates, Pins, Plaques

www.ieee.org/ra/scs/prodorder.html

scs-products@ieee.org

- **Regional Activities**

www.ieee.org/ra

regional-activities@ieee.org

- **Section/Chapter Support**

www.ieee.org/ra/scs

sec-chap-support@ieee.org

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- Donna McClelland -
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We're Here to Help!

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