Regional Activities and Technical Activities: Working Together for Chapters

www.ieee.org/chapters
www.ieee.org/scs
Chapter Support Staff

Vicki Waldman, Supervisor, RAD Section/Chapter Support

April Nakamura, TAD Society Chapter Coordinator

RAD - TAD
Geographic & Technical Unit Relationships

IEEE Board of Directors

Technical Activities Board
- Divisions
  - Societies
    - Chapters
  - Affinity Groups

Regional Activities Board
- Regions
  - Councils
    - Student Branches
      - Student Branch Chapters
  - Affinity Group Parents (WIE, GOLD, CN)
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:

- Technical Society Parent
- Geographic Parent

Chapter
Some ComSoc Statistics

- 135 Chapters worldwide in 2001
- 513 meetings/conferences (average 3.8 meetings/year/Chapter)
- average attendance: 11.74 members & guests per meeting
More Statistics

- 55 joint Society Chapters, 22 of these with Signal Processing
- 2 joint Section Chapters
- 3 joint Section and Society Chapters
Did you know?

- Chapters can earn a $180 rebate annually through the Section.

- 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.
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

- Through IEEE Regional Activities Department
  - $180 for Chapters in compliance
  - $3/per member, including affiliates!
  - 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

- 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
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/scsreports
  - Select link for meeting report (L-31)
  - Print a copy to send to Section Secretary
REPORT OF MEETING ACTIVITY

This report form is for the permanent records of the Section Secretary who will forward all copies to the IEEE Regional Activities Department in one annual reporting package at the end of each calendar year.

Section Secretary - complete and file this form following each meeting of the Section.
Subsection Secretary - complete and forward this report to the Section Secretary following each Subsection meeting.
Chapter or Affinity Group Officer - complete and forward this report to the Section Secretary within ten days following each Chapter or Affinity Group meeting.

↓ SPONSOR OF MEETING (fill in name of all that apply):
Section: ____________________________
Subsection: __________________________
Chapter: ____________________________
Affinity Group: ______________________

↓ MEETING DATE: ____________ WAS THERE AN ADMISSION CHARGE? YES ☐ NO ☐ Optional food or facility expenses with a meeting not considered an admission charge.

↓ MEETING CATEGORY: 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ (check only one) Technical Educational Professional Administrative Social

↓ ATTENDANCE: IEEE members: _________ Guests: _________ Total: _________

↓ DID STUDENT MEMBERS ATTEND THIS MEETING? YES ☐ NO ☐

↓ WAS THIS MEETING JOINT WITH STUDENT BRANCH(ES)? YES ☐ NO ☐

Title of Paper: ____________________________ Organization: ____________________________ Phone: ____________________________
Address: ____________________________

Speaker Rating: Would you recommend this speaker to other IEEE audiences?
(circle) NOT RECOMMENDED 1 2 3 4 5 STRONGLY RECOMMENDED

Title of Paper: ____________________________ Organization: ____________________________ Phone: ____________________________
Address: ____________________________

Speaker Rating: Would you recommend this speaker to other IEEE audiences?
(circle) NOT RECOMMENDED 1 2 3 4 5 STRONGLY RECOMMENDED

Presiding Officer: ____________________________ Title: ____________________________ Date: ____________________________
MEETING REPORT

This report form is for the permanent records of the Section Secretary who will forward all copies to the IEEE Regional Activities Department in one annual reporting package at the end of each calendar year.

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Chapter or Affinity Group Officer - complete and forward this report to the Section Secretary within ten days following each Chapter or Affinity Group meeting.

SPONSOR OF MEETING (fill in name):

Section or Council: 
SubSection: 
Chapter: Princeton/Central Jersey CE/COM Chapter
Affinity Group: 

MEETING DATE: 9 March 2001

WAS THERE AN ADMISSION CHARGE? no
(Optional food or facility expenses with a meeting not considered an admission charge)

MEETING CATEGORY: (Select ONE) Administrative
This is a confirmation of the information you have submitted for your meeting activity. Please print a copy of this document for your records and send it to your Region, Society, or Section contacts, as needed. Thank You.

SPONSOR OF MEETING (fill in name):

Section: New York
SubSection:
Chapter: Communication
Affinity Group:

MEETING DATE: 2 October 2001
WAS THERE AN ADMISSION CHARGE? no
(Optional: food or facility expenses with a meeting not considered an admission charge)
MEETING CATEGORY: (Select ONE) Technical

ATTENDANCE: IEEE Members: 25 Guests: 11 Total: 36

WAS THIS MEETING JOINT WITH STUDENT BRANCH(ES)? no
DID STUDENT MEMBERS ATTEND THIS MEETING? yes

Title of Paper 1: User Interface Design
Speaker: Alexander Bell
Organization: AT&T
Phone: 212-555-5555
Address:
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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Successful Meetings
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
Newsletters
Newsletter Editors’ Page

www.ieee.org/ra/scs
Click on “Newsletter Editors” (left)

- All-Electronic Newsletters
- “Filler” articles
- Best practices
- SC ’99 Presentations on newsletters
- Links to Section newsletters for ideas
"All-Electronic" Newsletters

- Mostly electronic is better
- One snail mailing to members each year
- Four Steps
  - Electronic mailing list
  - Prepare the membership
  - Format the newsletter
  - Start the transition
“Filler Articles”

- IEEE web accounts
- Update member records online
- IEEE Email aliases
- IEEE Online Store
- IEEE Travel Service Online
- Senior Member elevation process
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
Chapter Chair Pins
Recognition Product Pricing

- **Certificates**
  - $4 or $5 depending on style
  - Customized - $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

- **New Officer Kits**
  - welcome letter
  - report forms
  - list of responsibilities
  - request for letter to employer
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
  - member lists, labels
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
Section/Chapter Support Staff

- Tracy Hawkins - t.hawkins@ieee.org
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- Vicki Waldman - v.waldman@ieee.org
  Rebates, Reporting, Unit viability
  SCOOP
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  Officer specialist, Roster, Unit Formations
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  Web master, bylaws
- Kathy Baretta - k.barrett@ieee.org
  Section Custody Accounts
- Donna McClelland - d.mcclelland@ieee.org, Product orders
We're Here to Help!

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