2023 MGA Surplus Funding Proposal

PROJECT TITLE: Seamless Collaboration and Connection: Enhancing Virtual Networking with the Meeting Owl Pro across Region 1 and Region 2.

PROPOSAL SUBMITTED BY: IEEE REGIONS 1 and 2

PROJECT LEAD NAME: Greg Gdowski and Drew Lowery
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PROJECT DESCRIPTION

Our proposal is to utilize the Owl Labs Meeting Owl Pro as a means of facilitating virtual networking and collaboration across Regions 1 and 2 by connecting members in remote locations. With its advanced audio and video technology, the Meeting Owl Pro can seamlessly integrate individuals into virtual meetings and events, offering an immersive and engaging experience. By leveraging this technology, we aim to improve our ability to merge the two regions and promote greater communication and collaboration among members. With the Meeting Owl Pro, members will be able to connect and collaborate in real-time, regardless of their geographic location, making it easier for teams and groups to work together effectively.

Significance:

The IEEE Board of Directors has approved a merger between Region 1 and Region 2 as part of the organization's realignment initiative. This decision was made to ensure that each region is fairly represented on the Board, and after careful consideration and analysis of the organization's strategic goals. The leadership of both regions is committed to a smooth transition to a new unified Region 2 by 2028, and efforts are underway to provide support and resources to facilitate integration.

However, the geographic landscape (Figure 1) of the two regions presents a challenge to collaboration and connection between members, who number 21,000 and 19,000 in Regions 1 and 2, respectively. Members within one section rarely interact with members in other sections, which limits their exposure to diversity in the organization. The COVID-19 pandemic has accelerated the development of virtual meetings, but these lack the in-person experience that most members have come to expect. The opportunity is to create hybrid meetings that offer the best of both worlds, allowing members to experience diversity without significant travel expenses.

One of the difficulties in creating hybrid meetings is the need for equipment and limited internet bandwidth at meeting locations. However, technology has advanced significantly to overcome these obstacles. In 2022, Region 1 launched a pilot study using the Owl Labs Meeting Owl Pro to facilitate hybrid meetings. The study was successful, and while there were occasional deployment issues, these can be overcome with limited support and training modules. Exciting new metrics have been developed as a consequence of the pilot study to evaluate the overall impact of new proposed
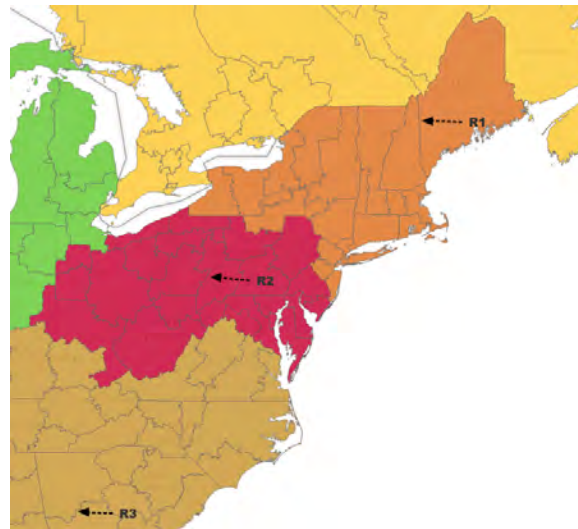

Figure 1 Geographic area of Regions 1 and 2.

initiative on Regions 1 and 2.

We propose to provide each Section in Regions 1 and 2 with an Owl Labs Meeting Owl Pro unit. The requested funds will be dedicated solely to the delivery of this technology. Our pilot study with four Sections has demonstrated that this technology will be well-received by all Sections, regardless of their size, within both regions. Our experience with the pilot study has provided valuable insights that can be readily applied to other Sections in Regions 1 and 2.

The outcome of this initiative will serve as a testbed to determine the viability of a larger global deployment and initiative, which could have an exciting much more significant impact on the IEEE organization as a whole.

What makes the Owl Labs Meeting Owl Pro unique and ideal for this proposal?

The Meeting Owl Pro (**Error! Reference source not found.**) was innovated within Region 1 by Owl Labs in Boston. It is a video conferencing camera that offers several advantages for remote meetings and collaborations, including:

1. 360-degree camera: The Meeting Owl Pro has a 360-degree camera that can capture every angle of the room, making it easier for remote participants to see and hear everything that's happening.

2. Smart technology: The Meeting Owl Pro uses smart technology to focus on the speaker and automatically adjust the camera angle and zoom, making it easier to follow the conversation.

3. Easy setup: The Meeting Owl Pro is easy to set up and use. Simply plug it in, connect it to your computer, and start your video conference. While we have experienced one deployment issue, this has since been resolved. Overall, this an attribute that is critical in setting up hybrid meetings quickly without disruption to the normal setup time of an in-person meeting.

4. Portable design: The Meeting Owl Pro is lightweight and portable, making it easy to move between rooms or take it on the go. This is an essential attribute that we have found is import to Sections.

5. Compatibility: The Meeting Owl Pro works with a variety of video conferencing platforms, including Webex, Zoom, Microsoft Teams, and Google Meet.

6. High-quality audio: The Meeting Owl Pro has high-quality microphones that can pick up sound from every corner of the room, making it easier for remote participants to hear everything that's being said.

Overall, the Owl Labs Meeting Owl Pro is a versatile and easy-to-use video conferencing camera that can help make remote meetings more effective and engaging.

Figure 2 Meeting Owl Pro (top), video technology (middle), audio technology (bottom).

Figure 3 Utilization of the Owl Labs Meeting Owl Pro unit at (top) the hybrid Rochester Section ExCom Meeting on December 6, 2022 at the Tandoor of India restaurant in Henrietta NY and the (bottom) hybrid North Jersey Excom Meeting located at a university conference room.
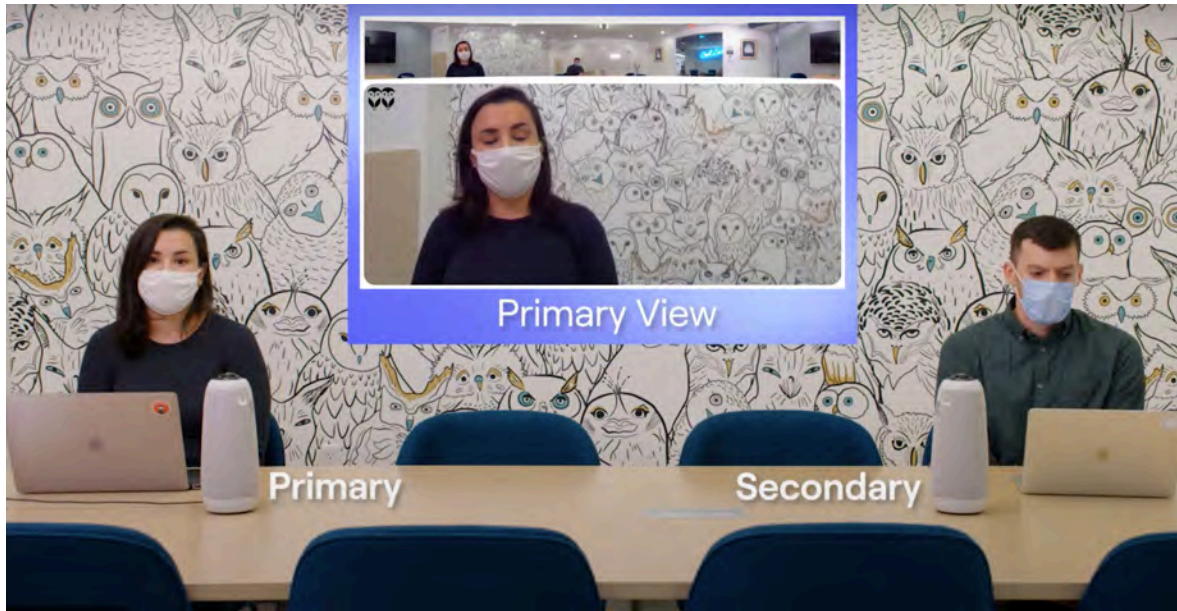
Figure 4 [Screen capture from a youtube video](#) illustrating how two Meeting Owl Pro units can be paired using Owl Connect to extend their audio and video range.

Pilot Study

A pilot study was conducted in Region 1 to assess the feasibility of using the Meeting Owl Pro in various environments and sections across the region. Four units were purchased and deployed in the Syracuse, North Jersey, Long Island, and Boston Sections. Additionally, Region 1 Director Greg Gdowski purchased a Meeting Owl Pro through the University of Rochester and used it during the local Rochester Section Excom meeting. The device was tested in different settings, including restaurants with low-bandwidth internet resources, university classrooms, conference rooms with high-bandwidth internet resources, and hotels for IEEE Board meetings and R1 Board of Governor meetings (Figure 3). In all cases, the Meeting Owl Pro was used with Webex, which is part of the global IEEE resources.

Moreover, two wirelessly connected Meeting Owl Pro units were utilized by Region 1 and 2 during a joint Board of Governors meeting held in New York City in February 2023 (Figure 4). Owl Connect was used to pair two Owls to extend their audio and video range by 8 feet (2.5m) in any direction, which was successfully achieved. The utilization of two systems shows promise for larger meetings with more participants. Unfortunately, the BoG meeting was recorded on a personal computer system that was later stolen, resulting in no available pictures.

The feedback received has been mostly positive, with Ajay Poddar stating that "all attendees enjoyed the Owl device, very powerful. We did not have any issues with its use. The Owl device is simply very good, thank you for giving it to our section for evaluation," and Hong Zhao describing it as a "nice experience of using the Owl device."

Lessons learned:

Lessons learned from the pilot study include encountering initial difficulties, such as an older computer with a USB-C connector that couldn't connect to the Meeting Owl Pro. A solution was found by including USB adapters, which can be used to connect the device to a wider range of

computer systems. Another instance was the device taking several minutes to connect to a system that had never used it before, which can be addressed through proper training and video guides to assist users in utilizing the device. These lessons will be incorporated into the proposed initiative by including commonly used adapters and providing sufficient training to ensure a smooth user experience.

Distribution and utilization of devices.

To ensure a seamless deployment process, the Owls will be delivered to the designated Section Chair via insured mailing USPS services. The Section Chair will be responsible for overseeing the storage and usage of the hardware. As a prerequisite to receiving the device, each Section must agree to replace it at their own cost if it is lost or stolen. Additionally, detailed instructions and links to training materials, developed as part of the proposed initiative, will be provided to each Section.

The Owls are primarily intended to be used during Excom meetings, as well as other Section and Chapter meetings. Sections that agree to utilize the hardware during technical meetings will have the opportunity to expand the reach of their events across Region 1 and Region 2 through regional vtools invitations and emails. Section Chairs will be required to report the number of individuals attending meetings remotely from outside their Section, which will serve as a metric of outreach success resulting from hardware usage.

Furthermore, the regions will monitor the hardware usage using Owl Labs software, such as Owl Nest (*see below*). If the units are not being used regularly, the regions will reserve the right to recall and redeploy the hardware to Sections that have greater needs and usage. This ensures efficient resource utilization and promotes productivity within the region.

Desired outcomes of the proposed program:

Our program aims to enhance collaboration within and across Regions 1 and 2 by improving meeting attendance, member engagement, member retention, and overall satisfaction. To evaluate the success of the program, we will track the following outcomes:

1. Meeting attendance: We will measure the impact of the Meeting Owl Pro deployment on meeting attendance among remote members by comparing attendance numbers before and after the deployment.
2. Member engagement: We will evaluate if the Meeting Owl Pro has led to increased member engagement among remote members by collecting feedback from members and tracking participation rates during meetings.
3. Cost savings: We will attempt to assess if the Meeting Owl Pro has resulted in cost savings associated with reduced travel expenses by comparing travel expenses before and after the deployment.
4. Member retention: We will evaluate if the Meeting Owl Pro has led to increased member retention among remote members by comparing retention rates before and after the deployment.
5. Satisfaction: We will measure member satisfaction with the Meeting Owl Pro by collecting feedback on ease of use, audio and video quality, and overall effectiveness.

By regularly monitoring these metrics, we can assess the effectiveness of the Owl Labs Meeting Owl Pro deployment and make necessary adjustments to ensure continued success. Our program aims to foster greater collaboration, communication, and efficiency within and across Regions 1 and 2."

Does the project involve more than one Region: Region 1 and Region 2.

How the project shall address member engagement, member retention, member recruitment?

The Owl Labs Meeting Owl Pro can help improve member engagement, member retention, and member recruitment in several ways:

1. Member Engagement: The Meeting Owl Pro's 360-degree camera and smart technology can help remote members feel more connected and engaged during virtual meetings. By being able to see and hear everyone in the room, remote members are more likely to feel included in the conversation and to participate actively.

2. Member Retention: By providing a high-quality video conferencing experience, the Meeting Owl Pro can help keep remote members engaged and connected to the group. This can lead to higher member retention rates as remote members feel more connected to the group and are more likely to continue participating.

3. Member Recruitment: The Meeting Owl Pro can also help attract new members to a group or organization by providing a professional and engaging virtual meeting experience. Remote members who are considering joining a group or organization may be more likely to do so if they feel that they will be able to participate fully in virtual meetings and connect with other members.

In summary, the Meeting Owl Pro is an excellent tool for enhancing member engagement, retention, and recruitment. It offers a high-quality and immersive virtual meeting experience that helps remote members feel more connected and included. By strengthening the sense of community and belonging within a group or organization, the Meeting Owl Pro can help improve overall member satisfaction.

Furthermore, Sections that utilize the hardware for hybrid meetings will be advertised region-wide, thus increasing the diversity and overall access to events for members of any section. This will promote inclusivity and encourage more members to participate in events, regardless of their physical location. The Meeting Owl Pro's ability to bridge the gap between in-person and virtual meetings will undoubtedly improve the overall quality of events and foster a more cohesive and engaged community.

Description of the short-term and long-term impact of the project:

This project will have both short and long-term impacts in connecting groups of people across the large geographic areas that define Region 1 and Region 2.

Short-term impacts:

1. Improved communication: The Meeting Owl Pro can help improve communication and collaboration among regional and sectional members in remote locations. By providing a high-quality video conferencing experience, members can easily communicate and share information, which can help improve productivity and efficiency.

2. Increased participation: Many Sections within R1 and R2 geographically span over 90 miles. In many cases, members in remote locations have never attended sectional meeting. The Meeting Owl Pro can help increase participation and engagement among remote members. By making it easier for remote members to see and hear everything that's happening in the meeting, they are more likely to participate actively and feel included in the conversation.

3. Reduced travel costs: The Meeting Owl Pro can help reduce travel costs associated with in-person meetings. This can help organizations save money and reduce their carbon footprint.

Long-term impacts:

1. Increased collaboration: By providing an effective virtual meeting experience, the Meeting Owl Pro can help build stronger relationships among group members in remote locations. This can lead to increased collaboration and innovation over time.

2. Improved decision-making: The Meeting Owl Pro can help improve decision-making by ensuring that all group members have the same information and are able to participate fully in the discussion. This can help organizations make better decisions and achieve better outcomes.

3. Increased engagement and retention: By providing a sense of connection and community among remote members, the Meeting Owl Pro can help increase member engagement and retention over the long term. This can lead to a stronger and more resilient organization.

Overall, the Owl Labs Meeting Owl Pro can have both short and long-term impacts in connecting groups of people across large geographic regions. By providing an effective virtual meeting experience, the Meeting Owl Pro can help improve communication, collaboration, and decision-making, and build stronger relationships among remote members over time.

Project Budget (USD) (Split % of the budget between Region & MGA):

We have worked with Owl Labs and one of their primary distributors (CDW) to provide an aggressive discount for deploying their technology across R1 and R2. The initial cost of our pilot study was approximately $1,100/unit. Owl Labs is excited by our proposal and will allow us to purchase up to 50 units for $861/unit (*see included quote*). Our plans are to purchase a total of 50 units including:

1. R1 and R2 Board of Governors: 4 units
2. 22 R1 Sections and 2 subsections: 24 units
3. 20 R2 Sections and 2 subsections: 22 units

Income

IEEE Region 1 (R1 Pilot 2022 budget)	(*see below*)	USD $5,260
IEEE MGA Funding (if approved)	46x$861	USD $50,000
Other sources (if applicable)	USD $0	

Expenses (total cost of project: USD: $55,243)

R1 Pilot (purchased and deployed in December 2022)

4 Meeting Owl Pro ($1,100/unit)	USD $4,400
4 Cases ($100/unit)	USD $400
4 25' Cables ($30/unit)	USD $120
4 USB Adaptors ($20/unit)	USD $80
4 tripods (Amazon Basics 50-inch Tripod Stand With Bag)	USD $60
4 Shipping to Sections ($50/unit)	USD $200
Total	**USD $5,260**

Proposed R1/R2 wide initiative

46 Meeting Owl Pro ($861/unit, shipping $487)	USD $40,092
46 Cases ($100/unit)	USD $4,600
46 25' Cables ($30/unit)	USD $1,380
46 USB Adaptors ($20/unit)	USD $920
46 tripods (Amazon Basics 50-inch Tripod Stand With Bag)	USD $690
46 Shipping to Sections ($50/unit)	USD $2,300
Total	**USD $49,983**

Software requirements, if any:

The Owl Labs Meeting Owl Pro has the following software requirements:

1. Operating system: Windows 7 or later, macOS 10.10 or later, Chrome OS, or Linux Ubuntu 16.04 or later.
2. Video conferencing software: The Meeting Owl Pro is compatible with most video conferencing software, including Zoom, Skype, Google Meet, Microsoft Teams, and Webex.
3. USB 2.0 port: The Meeting Owl Pro requires a USB 2.0 port to connect to your computer.
4. Internet connection: The Meeting Owl Pro requires an internet connection with at least 1 Mbps upload and download speed for optimal performance.
5. Processor and memory: The Meeting Owl Pro does not have specific processor or memory requirements, but it is recommended to use a computer with at least an Intel Core i5 processor and 8 GB of RAM for the best experience.
6. Browser: The Meeting Owl Pro can be used with most modern web browsers, including Google Chrome, Mozilla Firefox, and Microsoft Edge.

Overall, the Meeting Owl Pro is designed to be compatible with a wide range of devices and software, making it easy to use in a variety of settings.

Estimated start/completion dates:

If approved for funding, the project will commence immediately. We anticipate that the deployment of the Meeting Owl Pros will take approximately 2-3 months after approval of the proposal. Following the deployment, Regions 1 and 2 will develop training and support modules to facilitate the use of the Meeting Owl Pro across the regions. The project is expected to be fully completed by the end of 2023, with all aspects of the proposed work finished by that time.

Additional sections/comments
Deployment and support across Region 1 and Region 2:

To deploy the Meeting Owl Pro across 42 sections in Regions 1 and 2, we will utilize the following steps:

1. Purchase the necessary Meeting Owl Pro units for each section. In most cases, we anticipate this will be at least 1 unit for each Section. Sections with Sub-sections may require additional units.
2. We will provide training and support for members on how to use the Meeting Owl Pro effectively. This will be done in collaboration with Owl Labs. We will create video resources that will be deployed on the R1 and R2 websites so that members can readily use the Meeting Owl Pro efficiently.
3. We will establish guidelines and protocols for using the Meeting Owl Pro during meetings to ensure that all members can participate fully. These will be tailored to utilizing the Meeting Owl Pro with the most utilized platform, Webex. We have been using the currently purchased Meeting Owl Pro units successfully with Webex in 4 Sections of R1.
4. Monitor the use of the Meeting Owl Pro across sections and collect feedback from members to evaluate its effectiveness and identify areas for improvement. This will be accomplished by creating a feedback form on the R1 and R2 websites using gravity forms.

Overall, deploying the Owl Labs Meeting Owl Pro across 42 sections in Regions 1 and 2 could help improve communication, collaboration, and member engagement, while also reducing travel expenses and improving member retention.
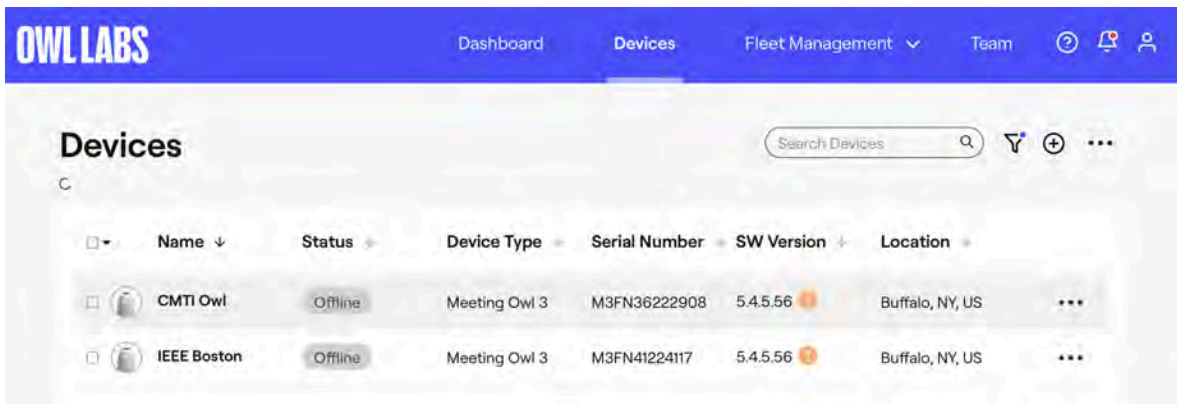
Figure 5 Utilization of Owl Labs "Owl Nest" to manage devices and software updates across Region 1 and Region 2.

Regional management of deployed devices:

We have extensively tested the powerful resource, Owl Nest, provided by Owl Labs, for managing the hardware and software updates of our deployed devices. As shown in Figure 5, the Owl Nest tool not only streamlines the device update process, but it also provides detailed device analytics, which enables us to gain a comprehensive understanding of how frequently the Owls are being utilized.

The Nest Administrators have the privilege to remotely manage our organization's fleet of Owls through the Owl Nest platform. This tool enables administrators to remotely update device software, customize an Owl's default settings, and perform other essential tasks, all without requiring physical access to the device. This streamlined management process allows us to efficiently manage the devices from any location.

Moreover, the Owl Nest's analytics function enables us to assess the utilization of the technology by each Section. In case an Owl is not being utilized regularly, the Regions will have the ability to recall and redeploy units to Sections that have a greater need. This ensures the efficient utilization of resources and enhances the Regions ability to monitor the hardware.

Review and Complete Purchase

MATT PERSONS,

Thank you for considering CDW for your technology needs. The details of your quote are below. **If you are an eProcurement or single sign on customer, please log into your system to access the CDW site.** You can search for your quote to retrieve and transfer back into your system for processing.

For all other customers, click below to convert your quote to an order.

Convert Quote to Order

QUOTE #	QUOTE DATE	QUOTE REFERENCE	CUSTOMER #	GRAND TOTAL
NFHX038	1/26/2023	QTY 50 OWL MEETING 3	217832	$46,402.82

QUOTE DETAILS

ITEM	QTY	CDW#	UNIT PRICE	EXT. PRICE
Owl Labs Meeting Owl 3 - conference camera Mfg. Part#: MTW300-1000 Contract: Standard Pricing	50	7057116	$860.66	$43,033.00

SUBTOTAL	$43,033.00
SHIPPING	$486.64
SALES TAX	$2,883.18
GRAND TOTAL	$46,402.82

PURCHASER BILLING INFO	DELIVER TO
Billing Address: IEEE ACCTS PAYABLE 445 HOES LN PISCATAWAY, NJ 08854-4150 **Phone:** (732) 981-0060 **Payment Terms:** NET 30 Days	**Shipping Address:** IEEE MATT PERSONS 445 HOES LN PISCATAWAY, NJ 08854-4150 **Phone:** (732) 981-0060 **Shipping Method:** DROP SHIP-GROUND
	Please remit payments to:
	CDW Direct P.O. Box 75723 Chicago, IL 60675-5723

Sales Contact Info

Thurman Dieter | 800.800.4239 | thurdie@cdw.com

LEASE OPTIONS			
FMV TOTAL	**FMV LEASE OPTION**	**BO TOTAL**	**BO LEASE OPTION**

$43,519.64	$1,257.72/Month	$43,519.64	$1,435.71/Month

Monthly payment based on 36 month lease. Other terms and options are available. Contact your Account Manager for details. Payment quoted is subject to change.

Why finance?

• Lower Upfront Costs. Get the products you need without impacting cash flow. Preserve your working capital and existing credit line.

• Flexible Payment Terms. 100% financing with no money down, payment deferrals and payment schedules that match your company's business cycles.

• Predictable, Low Monthly Payments. Pay over time. Lease payments are fixed and can be tailored to your budget levels or revenue streams.

• Technology Refresh. Keep current technology with minimal financial impact or risk. Add-on or upgrade during the lease term and choose to return or purchase the equipment at end of lease.

• Bundle Costs. You can combine hardware, software, and services into a single transaction and pay for your software licenses over time! We know your challenges and understand the need for flexibility.

General Terms and Conditions:

This quote is not legally binding and is for discussion purposes only. The rates are estimate only and are based on a collection of industry data from numerous sources. All rates and financial quotes are subject to final review, approval, and documentation by our leasing partners. Payments above exclude all applicable taxes. Financing is subject to credit approval and review of final equipment and services configuration. Fair Market Value leases are structured with the assumption that the equipment has a residual value at the end of the lease term.

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OWL CONNECT

Hear and see it all by pairing two Meeting Owls to span larger spaces. Owl Connect expands your coverage by 8 ft (2.5 m) and puts a Meeting Owl within 3-6 ft of every in-room participant.

KEY BENEFITS

- **Inclusive and collaborative hybrid meetings:** Shows remote participants the right view of the room at the right time so they can listen and participate with ease.

- **Full-room 360° video and audio coverage:** Maximizes video and audio engagement by putting a 360° camera, speaker, microphone within 3-6 feet (1.5 meters) of all in-room participants.

- **Supports all of your spaces:** Supports immersive hybrid collaboration in everything from small huddle spaces to large boardrooms so all participants can see, hear, and understand each other.

- **Devices get smarter over time:** Owl Labs devices receive WiFi software updates and enhancements over-the-air so they become more robust and intelligent over time.

> "
>
> Owl Connect is true differentiation, as there isn't a mainstream vendor mixing two cameras and multiple microphones at this price-point, or at all for that matter.
>
> __ **DAN ROOT, SENIOR ANALYST, WAINHOUSE**

HOW TO USE OWL CONNECT

1. Place 2 Meeting Owls 6-8 feet apart in your meeting room or classroom.

2. Plug both Meeting Owls into a power source, and plug 1 Meeting Owl into the host computer.

3. Use the Meeting Owl app to pair your Meeting Owls.

4. When your video conferencing meeting begins, remote participants will see the view of whichever Meeting Owl is closest to the active speaker.
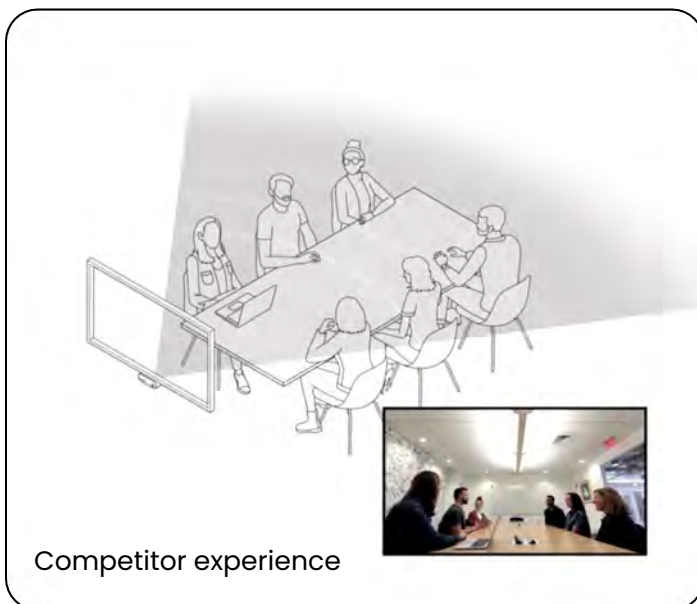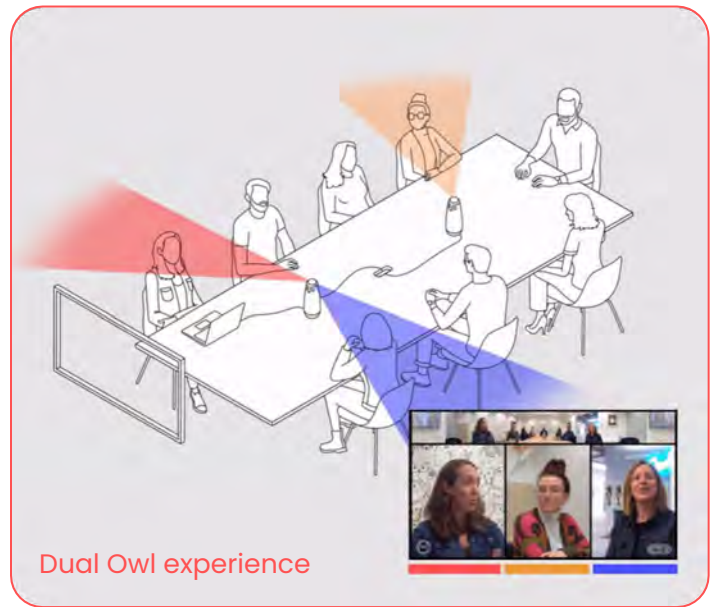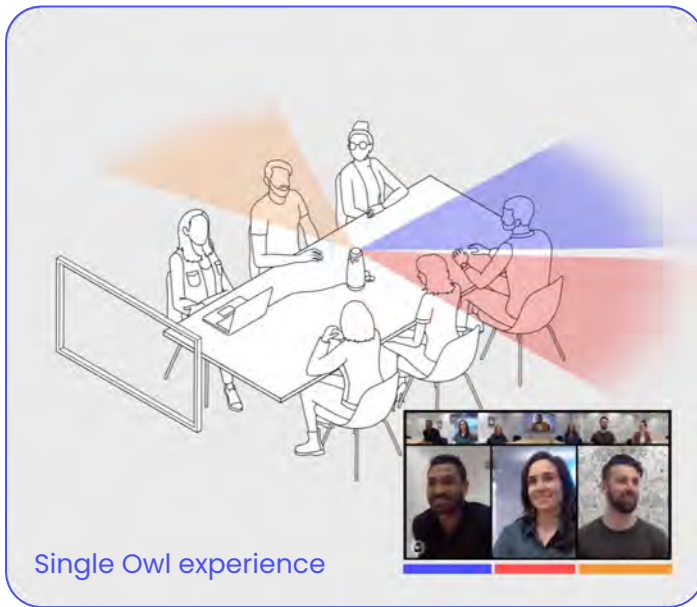
   Step-by-step instructions here

Learn More About Owl Connect

Setup options

Owl Labs devices wirelessly communicate to determine the best view of the room to show to remote participants at the right moment.

	Meeting Owl 3	Owl Connect
VIDEO PICKUP	10ft radius (20ft end to end)	28ft end to end
AUDIO PICKUP	18ft radius (36ft end to end)	44ft end to end

Single Owl experience

Dual Owl experience

Competitor experience

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The Meeting Owl has completely transformed our ability to work well across our team and our organization.
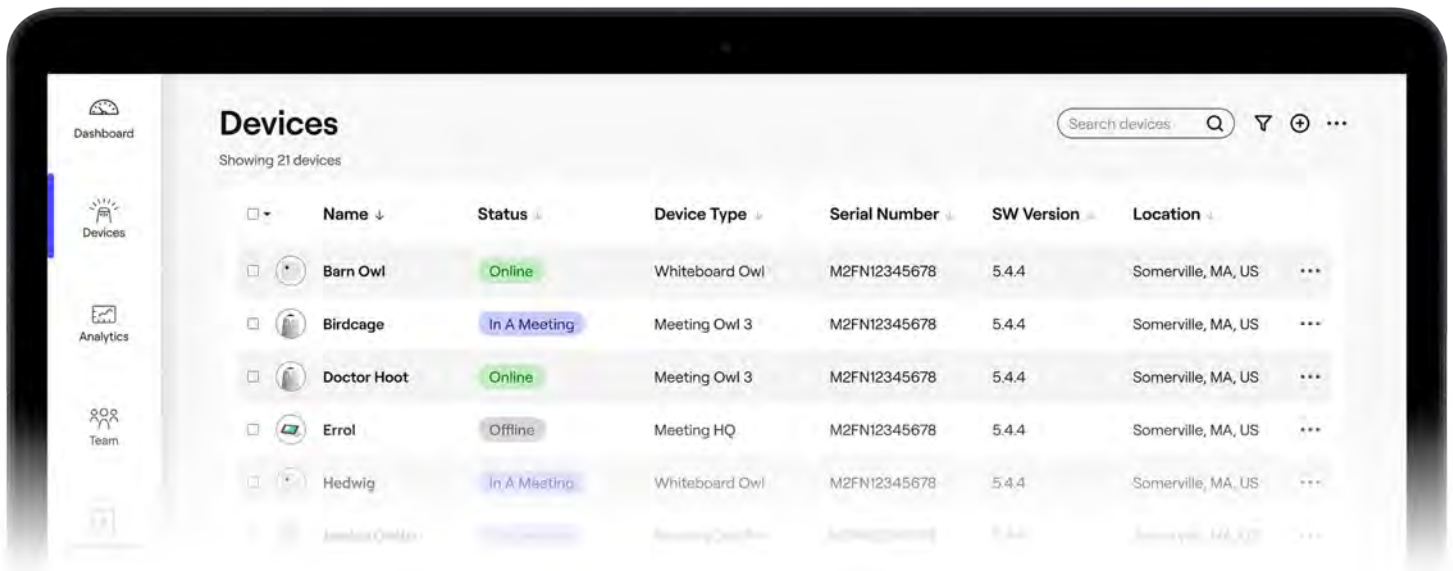
Learn More

MANAGE YOUR OWLS IN THE NEST

Welcome to The Nest: Our customer portal that gives you the tools to manage your fleet and support your team.

360 DEGREES OF VISIBILITY

- **Stay on top of your tech stack:** See the status all of your Owl Labs devices at-a-glance, or deep-dive into specific spaces.

- **Support and manage your technology at scale:** Adjust device settings, update software, and troubleshoot your tech remotely.

- **Prevent tech issues before they happen:** See real-time status updates and get notified about errors to keep your meeting spaces online and running smoothly.

- **Get usage insights:** See how your devices are being used to inform your workplace planning and purchasing.

- **Save time and better support your team:** Easily stay on top of your Owl Labs tech and reinvest your time into supporting and innovating for your team.

Learn More

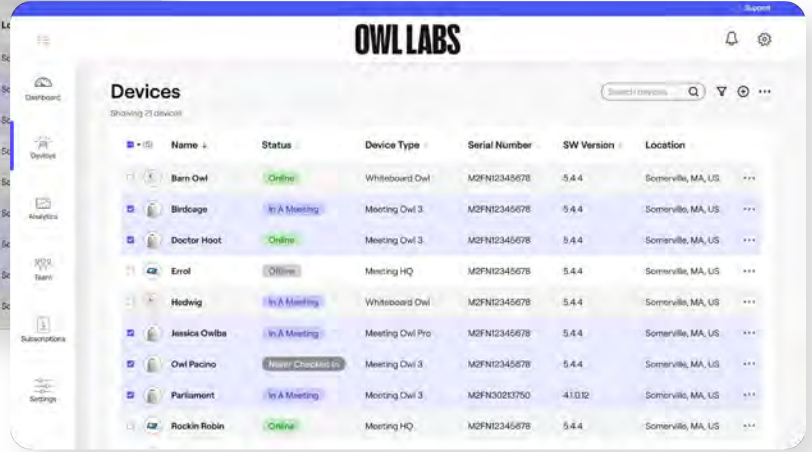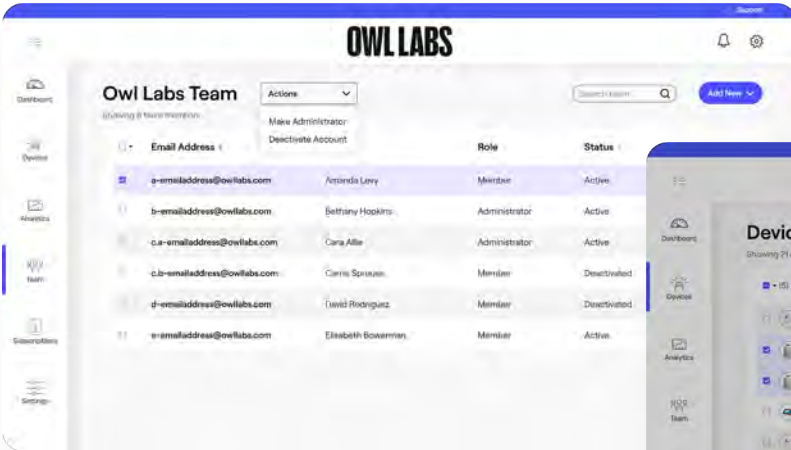| Partner Name | Company Name \| Partner Tier | Email | Phone Number |

A CLOSER LOOK AT THE NEST

Remote device management

Real-time device statuses and notifications

Team and user management

Device analytics

Learn More