IEEE Membership Development Conference Call / Web Cast

3 December 2011

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Today's Edition

Membership Statistics and Goals Update – John Day

Updates / Wrap-Up / Direction - Aleksandar Szabo

Open Floor Q&A

Subject Appendix: Field Team Resources

Today's Speakers

Aleksandar Szabo
Chair, IEEE MRRC

John Day
Director, Membership Development

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Web Cast Interface – ReadyTalk®

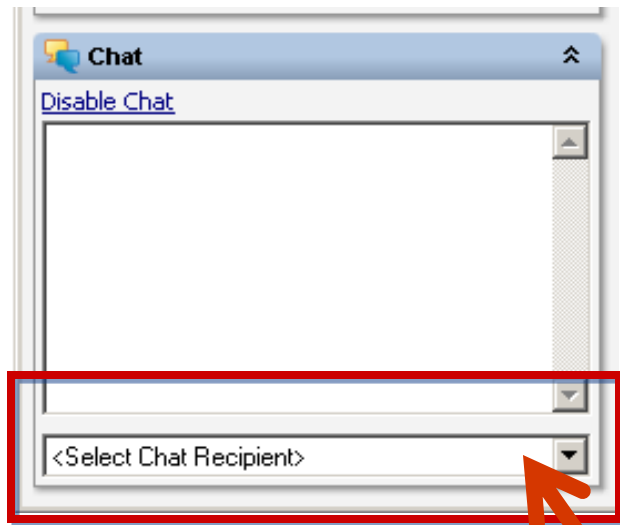Raise Hand

Hide Chat

Full Screen

Introductions /
Ask Questions

Web Cast Attendance Roll Call

Use the Chat pod.

Please type in your name/ title/location.

Web Cast Notes

Webcast presentation will be available on _new_ MD online community at http://oc.ieee.org (general access page) or http://ieee-md-net.oc.ieee.org/main for the MD Community/Group. You will need to use your IEEE web account for access. Once in, the presentation will be posted under the "Content" Tab. If you wish to join, please send email to c.downer@ieee.org for an invite.

Attendees will hear the broadcast via their computer.
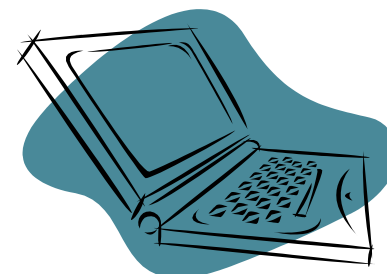
This webcast is recorded. Presentation and audio will be available as an "on-demand" resource – URL and announcement to be posted in the MD online community (please see access above)_._

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Webcast Notes – Raising Questions

- You can continue to ask topical questions using the chat box during the entire webcast. They will be presented by our Moderator to the appropriate presenter for response.

- Some questions in the Chat Box may be responded to during the webcast by presenters or Moderator.

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Membership Statistics & Goals Update

November 2011

Presented by:

John Day

Director, Membership Development

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November 2011 Dashboard – IEEE Membership

2012 Goal Attainment

		Goal*
Total Membership	38.3%	400,000
Higher Grade	39.7%	308,700
Student w/GSM	33.6%	91,300

*Sep 2011 through Aug 2012

Total Member Retention

■ 2011 ■ 2010

NOV	DEC	JAN	FEB
34.1% 34.4%	50.1%	62.5%	69.7%
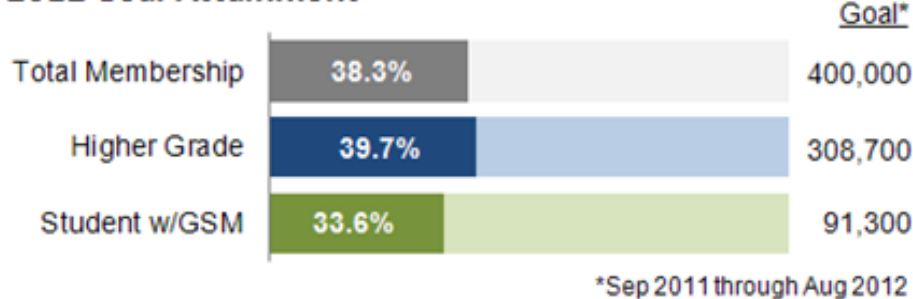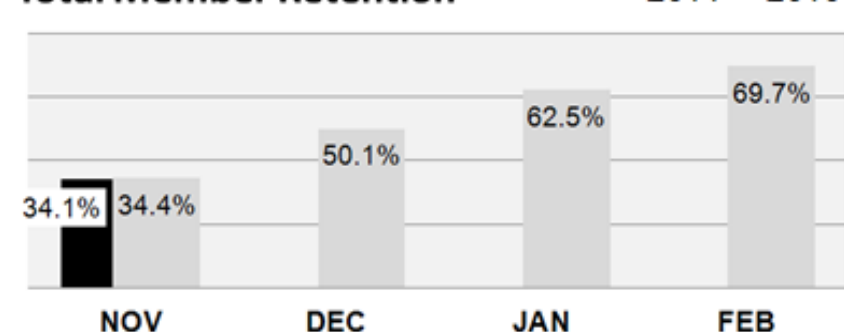
Monthly Census		YoY Variance		Nov '11	Nov '10	Oct '11	Nov '11 vs. Oct '11
IEEE Membership	⊕	8,777	+ 2.2 %	407,704	398,927	401,585	+ 1.5%
• Honorary	∧	2	+ 6.9%	31	29	30	+ 6.9%
• Fellow	∧	164	+ 2.5%	6,693	6,529	6,694	-
• Senior Member	∧	848	+ 2.6%	33,512	32,664	33,412	+ 0.2%
• Member	∧	3,109	+ 1.3%	251,162	248,053	251,259	-
• Associate Member	∨	(90)	-0.6%	15,724	15,814	15,631	+ 0.6%
• Graduate Student	∨	(254)	-0.7%	37,114	37,368	34,261	+ 8.3%
• Undergraduate Student	∧	4,998	+ 8.5%	63,468	58,470	60,298	+ 5.3%
Society Memberships	⊕	1,578	+ 0.5%	339,551	337,973	334,138	+ 1.6%
• 16 Societies up > 1%	∧	6,951					
• 10 Societies +/- 1%	⟷	(92)	Societies Note: Sum of respective gains and losses, with all counts including Affiliates. Without Affiliates, total Society memberships are up year-over-year by 4,069 or +1.3%.				
• 12 Societies down > 1%	∨	(5,281)					

Active Membership by Region

REGION	Higher Grade w/o GSM 2011	2010	Change #	%	Graduate Students 2011	2010	Change #	%	Undergraduate Students 2011	2010	Change #	%	TOTAL MEMBERS 2011	2010	Change #	%
1	31,072	31,748	(676)	-2.1%	1,901	1,968	(67)	-3.4%	2,140	2,064	76	3.7%	35,113	35,780	(667)	-1.9%
2	27,516	28,067	(551)	-2.0%	1,779	1,814	(35)	-1.9%	2,231	2,070	161	7.8%	31,526	31,951	(425)	-1.3%
3	25,038	25,309	(271)	-1.1%	2,272	2,378	(106)	-4.5%	3,109	2,894	215	7.4%	30,419	30,581	(162)	-0.5%
4	18,821	19,118	(297)	-1.6%	1,849	1,836	13	0.7%	2,355	2,308	47	2.0%	23,025	23,262	(237)	-1.0%
5	24,574	24,849	(275)	-1.1%	1,738	1,843	(105)	-5.7%	2,732	2,554	178	7.0%	29,044	29,246	(202)	-0.7%
6	49,290	49,876	(586)	-1.2%	2,941	3,170	(229)	-7.2%	3,851	3,630	221	6.1%	56,082	56,676	(594)	-1.0%
R 1-6	176,311	178,967	(2,656)	-1.5%	12,480	13,009	(529)	-4.1%	16,418	15,520	898	5.8%	205,209	207,496	(2,287)	-1.1%
7	13,377	13,420	(43)	-0.3%	1,853	1,807	46	2.5%	1,569	1,559	10	0.6%	16,799	16,786	13	0.1%
8	54,377	52,334	2,043	3.9%	10,280	10,167	113	1.1%	9,945	9,172	773	8.4%	74,602	71,673	2,929	4.1%
9	9,399	8,440	959	11.4%	1,501	1,578	(77)	-4.9%	6,607	6,405	202	3.2%	17,507	16,423	1,084	6.6%
10	53,658	49,928	3,730	7.5%	11,000	10,807	193	1.8%	28,929	25,814	3,115	12.1%	93,587	86,549	7,038	8.1%
R 7-10	130,811	124,122	6,689	5.4%	24,634	24,359	275	1.1%	47,050	42,950	4,100	9.5%	202,495	191,431	11,064	5.8%
TOTAL	307,122	303,089	4,033	1.3%	37,114	37,368	(254)	-0.7%	63,468	58,470	4,998	8.5%	407,704	398,927	8,777	2.2%

Table title: **Geographic IEEE Membership Summary - November 2011**

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Member <u>Renewals</u> – 2012

IEEE Membership Renewal / Retention - November 2011															
REGION	HIGHER GRADE w/o GSM				GRADUATE STUDENTS				UNDERGRADUATE STUDENTS				TOTAL MEMBERS			
	Opportunity	Renewal			Opportunity	Renewal			Opportunity	Renewal			Opportunity	Renewal		
		#	%, '12	%, '11		#	%, '12	%, '11		#	%, '12	%, '11		#	%, '12	%, '11
1	30,800	13,442	43.6%	44.2%	1,470	563	38.3%	40.2%	1,629	304	18.7%	20.4%	33,899	14,309	42.2%	42.9%
2	27,262	11,950	43.8%	43.9%	1,389	481	34.6%	37.6%	1,696	321	18.9%	19.0%	30,347	12,752	42.0%	42.3%
3	24,855	10,524	42.3%	41.4%	1,718	674	39.2%	39.3%	2,293	355	15.5%	18.5%	28,866	11,553	40.0%	39.7%
4	18,819	8,007	42.5%	42.7%	1,452	536	36.9%	41.6%	1,755	359	20.5%	21.6%	22,026	8,902	40.4%	41.0%
5	24,361	9,983	41.0%	40.9%	1,312	547	41.7%	39.7%	1,924	355	18.5%	17.8%	27,597	10,885	39.4%	39.4%
6	48,494	20,990	43.3%	42.6%	2,275	888	39.0%	42.3%	2,756	558	20.2%	22.0%	53,525	22,436	41.9%	41.6%
R 1-6	174,591	74,896	42.9%	42.7%	9,616	3,689	38.4%	40.3%	12,053	2,252	18.7%	20.0%	196,260	80,837	41.2%	41.3%
7	13,377	5,099	38.1%	37.2%	1,343	711	52.9%	53.5%	1,125	329	29.2%	29.3%	15,845	6,139	38.7%	37.9%
8	53,968	16,155	29.9%	30.3%	8,053	3,087	38.3%	38.9%	7,678	1,107	14.4%	13.6%	69,699	20,349	29.2%	29.4%
9	9,151	2,201	24.1%	22.1%	1,156	331	28.6%	26.1%	5,519	290	5.3%	5.8%	15,826	2,822	17.8%	16.5%
10	52,421	17,763	33.9%	34.1%	8,965	2,104	23.5%	22.7%	24,941	959	3.8%	3.1%	86,327	20,826	24.1%	24.1%
R 7-10	128,917	41,218	32.0%	32.0%	19,517	6,233	31.9%	31.8%	39,263	2,685	6.8%	6.5%	187,697	50,136	26.7%	26.7%
TOTAL	303,508	116,114	38.3%	38.3%	29,133	9,922	34.1%	34.7%	51,316	4,937	9.6%	9.7%	383,957	130,973	34.1%	34.4%

- Additional renewal campaign initiated by MD Staff team in November
  - Total member retention, as of November, down (0.3)% YoY, compared to (3.5)% last month
- Regions 7-10 retention performance roughly the same as last year, within margin of comfort
- U.S. retention highlights …
  - HG retention by Regions 3 and 6 outperforming same-period last year by > +0.5%
  - Region 6's weighted contribution (member counts) is driving YoY retention gains in U.S. HG membership
  - YoY Student retention across U.S. compromising total U.S. retention performance

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Member <u>Recruitment</u> – 2012 Membership Year, Cumulative YoY

	HIGHER GRADE w/o GSMs				GRADUATE STUDENTS				UNDERGRADUATE STUDENTS				TOTAL MEMBERS			
REGION	2011	2010	Change		2011	2010	Change		2011	2010	Change		2011	2010	Change	
			#	%			#	%			#	%			#	%
1	250	317	(67)	-21.1%	199	156	43	27.6%	466	441	25	5.7%	915	914	1	0.1%
2	240	316	(76)	-24.1%	159	156	3	1.9%	483	410	73	17.8%	882	882	0	0.0%
3	206	245	(39)	-15.9%	217	277	(60)	-21.7%	724	770	(46)	-6.0%	1,147	1,292	(145)	-11.2%
4	176	223	(47)	-21.1%	163	181	(18)	-9.9%	552	577	(25)	-4.3%	891	981	(90)	-9.2%
5	217	268	(51)	-19.0%	189	198	(9)	-4.5%	720	675	45	6.7%	1,126	1,141	(15)	-1.3%
6	460	542	(82)	-15.1%	236	286	(50)	-17.5%	1,025	904	121	13.4%	1,721	1,732	(11)	-0.6%
R 1-6	1,549	1,911	(362)	-18.9%	1,163	1,254	(91)	-7.3%	3,970	3,777	193	5.1%	6,682	6,942	(260)	-3.7%
7	174	180	(6)	-3.3%	170	171	(1)	-0.6%	402	342	60	17.5%	746	693	53	7.6%
8	984	1,010	(26)	-2.6%	981	1,083	(102)	-9.4%	2,035	1,368	667	48.8%	4,000	3,461	539	15.6%
9	269	288	(19)	-6.6%	157	226	(69)	-30.5%	909	905	4	0.4%	1,335	1,419	(84)	-5.9%
10	1,369	1,384	(15)	-1.1%	1,330	1,446	(116)	-8.0%	3,591	3,001	590	19.7%	6,290	5,831	459	7.9%
R 7-10	2,796	2,862	(66)	-2.3%	2,638	2,926	(288)	-9.8%	6,937	5,616	1,321	23.5%	12,371	11,404	967	8.5%
TOTAL	4,345	4,773	(428)	-9.0%	3,801	4,180	(379)	-9.1%	10,907	9,393	1,514	16.1%	19,053	18,346	707	3.9%

Cumulative Recruitment -- November 2011

- Assess opportunities to build awareness and interest in membership at Section, Chapter, and Branch-sponsored events and activities
- Have membership brochures / handouts present at all events -- Order online MD Kits (no cost to your OU) from www.ieee.org/md. Look for link to order MD Kits (right column)
  - <u>Volunteers of Region 6</u> … A half-dozen MD Kit orders from across the Region over the past week – about the same volume of MD Kit orders from across the entire U.S. for an entire month

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Goals – 2012 Membership Year (Aleksandar's Challenge)

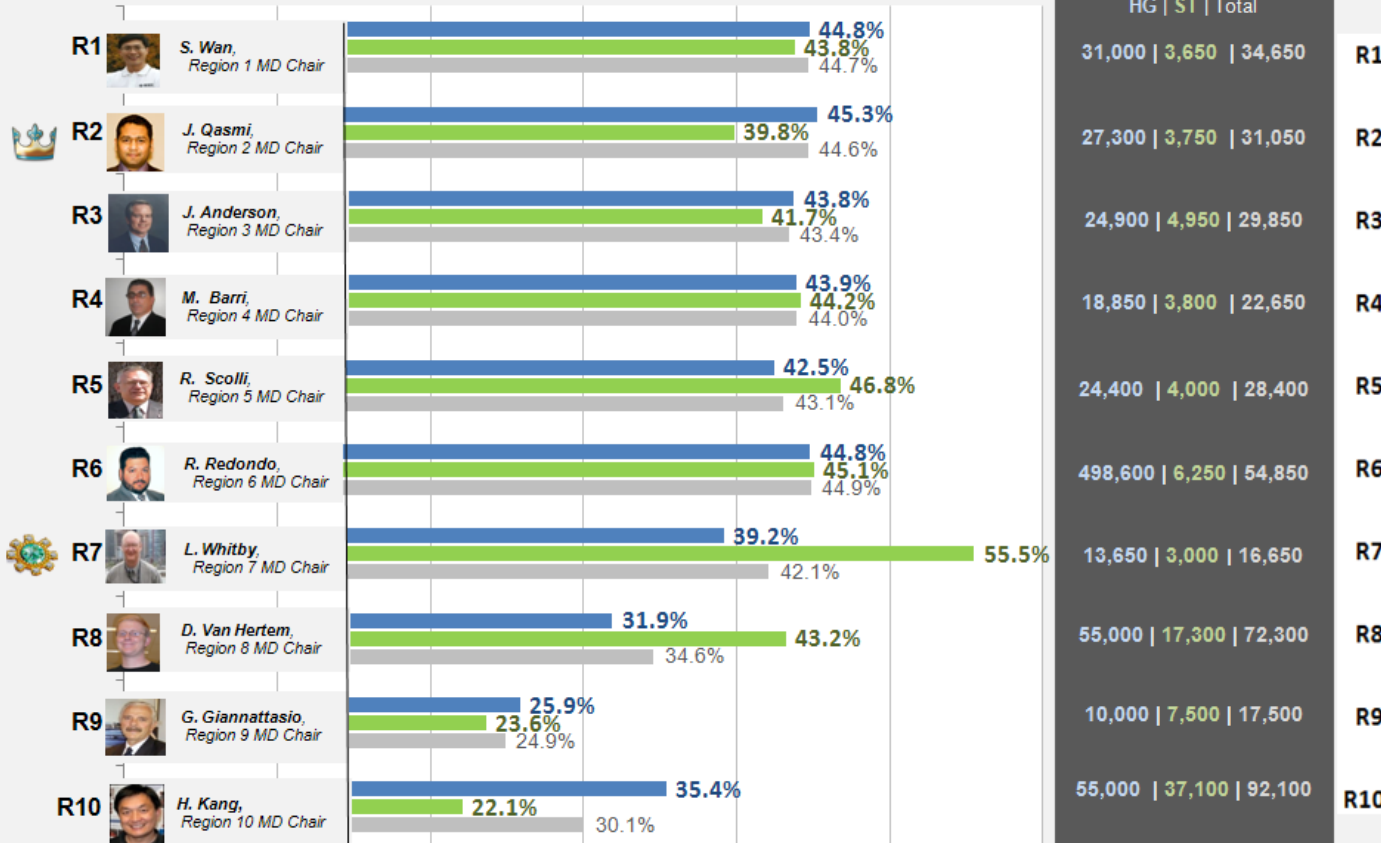**Aleksandar's Challenge** 🛡 400,000 members in Aug 2012 ◆IEEE

NOV 2011

Chart Key: % of Challenge Achieved:
- ■ Higher Grade
- ■ Student Grade
- ■ Total Members

👑 = best **higher-grade** progress to date
⚙ = best **student grade** progress to date

GRADE GOALS
HG	/	ST	/	Total
308,700	/	91,300	/	400,000

Numeric Goals by Region
HG | ST | Total

Region	Chair	Higher Grade	Student Grade	Total Members	HG	ST	Total	
R1	S. Wan, Region 1 MD Chair	44.8%	43.8%	44.7%	31,000	3,650	34,650	R1
R2 👑	J. Qasmi, Region 2 MD Chair	45.3%	39.8%	44.6%	27,300	3,750	31,050	R2
R3	J. Anderson, Region 3 MD Chair	43.8%	41.7%	43.4%	24,900	4,950	29,850	R3
R4	M. Barri, Region 4 MD Chair	43.9%	44.2%	44.0%	18,850	3,800	22,650	R4
R5	R. Scolli, Region 5 MD Chair	42.5%	46.8%	43.1%	24,400	4,000	28,400	R5
R6	R. Redondo, Region 6 MD Chair	44.8%	45.1%	44.9%	498,600	6,250	54,850	R6
R7 ⚙	L. Whitby, Region 7 MD Chair	39.2%	55.5%	42.1%	13,650	3,000	16,650	R7
R8	D. Van Hertem, Region 8 MD Chair	31.9%	43.2%	34.6%	55,000	17,300	72,300	R8
R9	G. Giannattasio, Region 9 MD Chair	25.9%	23.6%	24.9%	10,000	7,500	17,500	R9
R10	H. Kang, Region 10 MD Chair	35.4%	22.1%	30.1%	55,000	37,100	92,100	R10

Achievement progress combines renewals, recruitment, and reinstatement for the 2012 membership year., 16 Aug 2011 through 15 Aug 2012.

Student counts combine graduate and undergraduate members

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# Region 1–6 Strategy Update: "First-Year Focus"

- Large Section support
- Last membership year, these 18% of the U.S. Sections accounted for 60% of the total HG recruitment
- <u>Probability</u> > Without doing something, 18% of the Sections will account for 60% of first-year member attrition in the U.S.
    - 60% of last year's HG recruitment in the U.S. = 5,000 members

Dedicated MGA Staff support to this targeted effort: **Adrienne Hahn,** a.hahn@ieee.org

- Adrienne is establishing direct contact with the MD Volunteers in these Sections—strategy development, execution, progress reporting
- Opportunity to pilot new tactics and tools, for eventual expanded roll-out

First-Year Focus United States– Five Largest Sections per Region	
Boston	Chicago
New York	Twin Cities
North Jersey	Southeastern Michigan
Princeton	Central Indiana
Connecticut	Milwaukee
Northern Virginia	Dallas
Washington	Central Texas
Baltimore	Houston
Philadelphia	Denver
Pittsburgh	Saint Louis
Atlanta	Santa Clara Valley
Eastern North Carolina	Seattle
Florida West Coast	Oakland-East Bay
Huntsville	San Diego
Orlando	Oregon
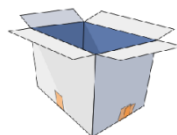
Auxiliary MD Kit also to be sent to these Sections to support recruitment efforts

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Society Memberships (including Affiliates) **– Monthly YoY & Drivers**

TOTAL SOCIETY MEMBERSHIPS
(including Affiliates)
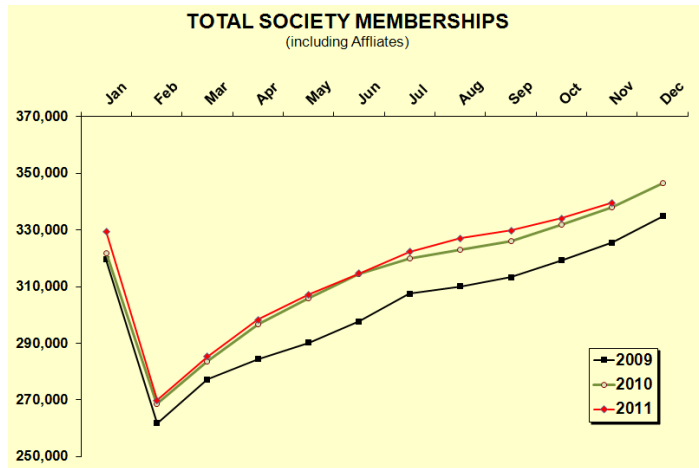
Total Society Memberships: **339,551**
YoY +0.5% (last month, +0.7%)

Society MD Disposition	YoY
Total Memberships Across 38 Societies	**+ 1,578**
Growth > 1%: 16 Societies	+ 6,951
+ / - 1%: 10 Societies	(92)
Decline > 1%: 12 Societies	(5,281)

Influence of Larger Societies

Power & Energy + 1.414 Communications + 1,013

35% of the gains

Computer (3,928)

74% of the declines

⭐ Double-Digit Percentage Gains
Year-over-Year

Society	YoY	
	Percent	Count
Robotics & Automation	20.4%	1,578

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In Closing … Membership Always Begins with the Individual Member

When we focus on "Membership" the member and their needs get lost in the crowd.

If we focus on the "Member" we strive to satisfy them, on their terms

"I feel welcome"

"My needs are met"

"I make a difference"

"I am the IEEE"

"I am a part of something great"

Truly satisfied members renew; truly satisfied members refer others to IEEE

thank you
questions ?

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Updates & Reminders / Direction

Aleksandar Szabo
    Chair, 2011 IEEE Membership
    Recruitment and Recovery (MRR)
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Use of SAMIEE for Renewal Data

1 December 2011

Presented by:
Aleksandar Szabo
IEEE MGAB MRRC Chair
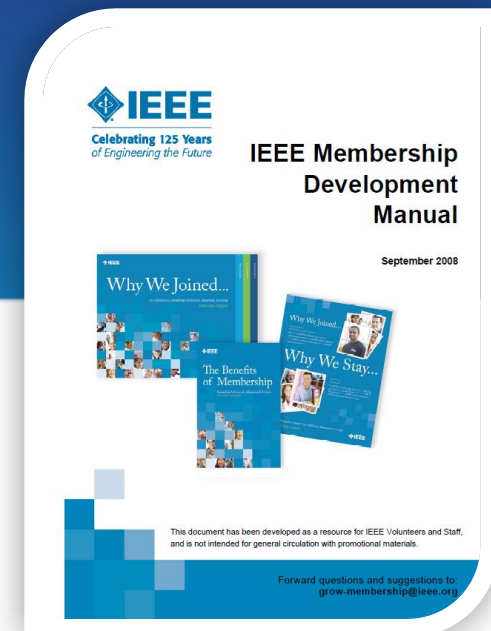
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IMPORTANT: User access to SAMIEE is limited by organizational unit and to the following IEEE volunteer positions
(names must be in the Geographic Roster!)

- Region Directors, Director Elects, Past Directors, Treasures, Secretaries
- Region MD Chairs
- Section/Council/Subsection Chairs, Vice Chairs, Treasures and Secretaries
- Section/Council/Subsection MD Chairs
- Chapter and Joint Chapter Chairs
- Student Branch Chairs and Counselors
- Society Presidents, President Elects, Past Presidents, Vice Presidents, Treasures, Secretaries, Executive Directors, Administrators, Chapter Coordinators
- Society MD Chairs

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Every MD Officer should use SAMIEEE

- Only by using SAMIEEE, MD Officers can get the data about the members in their organizational units
- Only by using these data MD Officers can efficiently do their job
- MD Officers should be familiar with SAMIEEE
- MD Officers should use SAMIEEE regularly
- MD Officers should use the Predefined Queries and if they want to modify them
- MD Officers can possibly prepare and use their own queries
- MD Officers not familiar with SAMIEEE should visit www.ieee.org/samieee and/or ask for help volunteers using SAMIEEE

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Past Due Members – Pre-Arrears and Deactivated Members - Arrears

- Members who will not renew for 2012 till the end of 2011 will continue to have all the member benefits during the two months grace period (January and February 2012). Such members are named Non-Renewed Members, Past Due Members or "Pre-Arrears"

- At the end of February, after the Terminator Action, all the Pre-Arrears who didn't renew are sorted out, their member benefits, rights and privilages are deactivated (they don't receive the journals anymore) and they are named Deactivated Members or "Arrears"

- Starting from the beginning of March 2012 all members renewing for 2012 are transfered from the list of Arrears to the list of Active Members and their member benefits, rights and privilages are activated again instantaneously (they receive again the journals)

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PRE-ARREARS - MEMBERS WHO DID NOT RENEW FOR 2012
ACCESS BEFORE THE END OF FEBRUARY 2012 ONLY

- **Go to SAMIEEE www.ieee.org/samieee**
- **Click Access SAMIEEE**
- **Insert you User ID and Password and click Login**
- **Click SAMIeee in Shared Folders**
- **Click Geographic Predefined Queries and you will get the list of Predefined Queries**

- **From the list of Predefined Queries select**
  - (GEO) 2011 Last Renewal Year for Active Members - Name, Grade, Email
    Results show information only about members in your geographic unit who paid for 2011, but didn't renew for 2012 along with Name, Grade, Membership Status and Email Contact. You can download the table to Excel and sort the data as you like.

- **From the list of Predefined Queries you can also select**
  - (MD) First Year Members not Renewed
    Results show information only about first year members in your geographic unit who joined for 2011, but didn't renew for 2012, showing Name, Grade, Membership Status and Email Contact. You can download the table to Excel and sort the data as you like.

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MEMBERS WHO RENEWED FOR 2012

▪ **Go to SAMIEEE www.ieee.org/samieee**

▪ **Click Access SAMIEEE**

▪ **Insert you User ID and Password and click Login**

▪ **Click SAMIeee in Shared Folders**

▪ **Click MD Predefined Queries and you will get the list of Predefined MD Queries**

▪ **From the list of MD Predefined Queries select**

– (MD) 2012 Renewal Year for Active Members - Name, Grade, Email
Results show members in your geographic unit who renewed for 2012, info includes Name, Grade, Membership Status and Email Contact. You can download the table to Excel and sort the data as you like.

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SELECTING THE ARREARS USING SAMIEEE

Use SAMIEEE to get the list of Arrears in your Organizational Unit
Before 28 Feb 2012 – Deactivated members who didn't renew for 2011
After 1 March 2012 – Members deactivated at the end of February 2012 who didn't renew for 2012

- **Go to SAMIEEE www.ieee.org/samieee**
- Click Access SAMIEEE
- Insert you User ID and Password and Login
- Click SAMIeee in Shared Folders
- Click Geographic Predefined Query and you will get the list of Predefined Queries
- From the list of Predefined Queries select (GEO) Arrears: Member Contact Info By Section-By Grade
- Download the list to Excel and sort the data as you like...

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To learn more about SAMIEEE visit www.ieee.org/samieee

Select

- ❑ the Quick Training Guide – a two page doccument giving step-by-step instructions on the basic SAMIEEE use
- ❑ Online Video Training Modules
- ❑ Reference Materials

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Reminders / Updates

❑ Report new officers via the online reporting at
http://www.ieee.org/societies_communities/geo_activities/required_
reporting/officer_forms.html

❑ Begin to review members who have not yet renewed – use
SAMIEEE pre-defined queries for reports.

❑ Continue to reach out to new joined members.

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Wrap Up / Direction – MD Prioritization

❑ January through April
  – 85% effort - Retention / Arrears Recovery
  – 15% effort - Recruitment

❑ May through August
  – 10% effort - Arrears Recovery
  – 90% effort - Recruitment

❑ September through December (switching gears)
  – 85% Recruitment
  – 15% Renewal monitoring
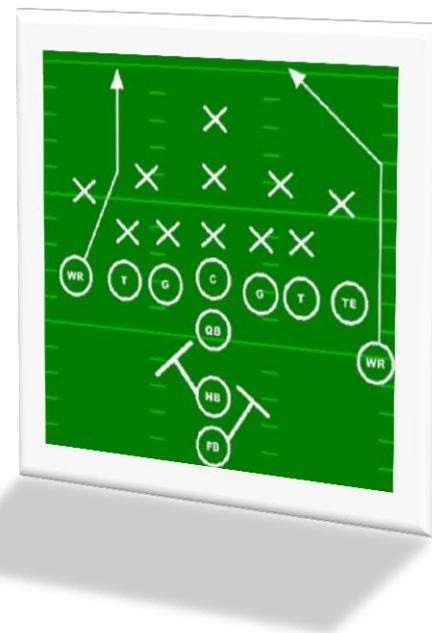
All the while … MD Staff support:
- Retention / arrears recovery campaigns, electronic and print (through August)
- Recruitment / incomplete applications / reinstatement campaigns (monthly)
- Recruitment / authors outreach (May timeframe)

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Future MD Webcast Topics & Speakers – Tentative Schedule

<u>January</u>

- �«ª» IEEE Job Site Update
- ◻ IEEE Contact Center Services
- ◻ Arrears Planning

<u>February</u>

- ◻ Arrears Actions

Wrap Up / Direction – Next Webcast

Schedule for 2012 is being determined.

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Thank you
Questions ?

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Open Floor Q&A

Webcast Notes – Raising Questions

- You can continue to ask topical questions using the chat box during the entire webcast. They will be presented by our Moderator to the appropriate presenter for response.

- Some questions in the Chat Box may be responded to during the webcast by presenters or moderator.

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Question raised by Vernon Price on Payment Options: outside of the U.S., information on IEEE web site, currency conversion.

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IEEE Dues Payment Process Options

In place for Regions 8, 9 and 10 (where requested)

Local Member Options:

- Collection can be handled by group: Student Branch, Society, Geographic Units

- Collect payments & send to IEEE as group _only._ One bank fee payment ($15.00 for wire transfer) or group check (Bank Draft) may then apply

- Work with Geographic Unit if they have a Custody Account

Additional information

IEEE Support Center

– https://supportcenter.ieee.org/

– Most popular questions raised and responses

– Featured Support Topics

Custody Accounts

• http://www.ieee.org/societies_communities/geo_activities /resources/local_currencies.html

Currency exchange rate

• http://www.gocurrency.com/

APPENDIX

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Appendix
Team Resources

MRRC Team Development – Engagement

- Alignment with the new MGA mission and values
- Volunteer & Staff partnership
- MD position vacancies
- Regional Training
- Partnering across IEEE
- MD Portal & Virtual Community
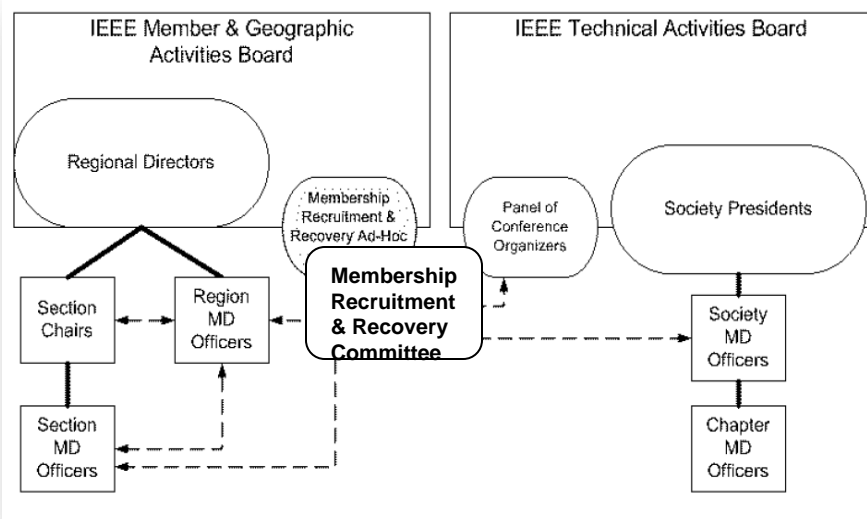
If the MGA is Successful …
IEEE member satisfaction & relevance is growing and reflected in improved retention and total membership
The MGA is a data-driven organization that proactively anticipates and reacts to the needs of the member and the profession
The MGA facilitates recruitment, training, development of IEEE volunteer leaders
The MGA facilitates successful regions, sections, chapters, and affinity groups
The MGA is responsible for all aspects of member and membership activities with the IEEE
The MGA ensures a "home(s)" for every member
Technology professionals will understand IEEE membership's importance in their careers
The MGA will develop sections, and regions and reward them based on their measured success
The MGA facilitates communications and engagement opportunities for IEEE members in multiple ways
IEEE and its members' achievements are universally recognized

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Membership Development Portal – www.ieee.org/md

- Membership Reports
- MD Online Community
- SAMIEEE access
- Membership Development Manual
- Member benefits at a glance (One-page flyer)
- Recruitment programs and tools
- MD Kits – online order form
- Benefit Development Toolkit: Regions 7-10
- Presentation templates
- IEEE membership statistics

Online Order Form available

Online MD Resources

- **The web page to join the IEEE**   **www.ieee.org/join**
- **The web page for MD volunteers**   **www.ieee.org/md**
- **The web page for IEEE benefits**
    – **www.ieee.org/benefits**

- **Your Region web page**   **www.ieee.org/??**
- **Your Section web page**   **www.ieee.org/??**
- **Your Chapter web page**   **www.ieee.org/??**
- **Your Conference web page**   **www.ieee.org/??**
- **Your Student Branch web page**   **www.ieee.org/??**

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