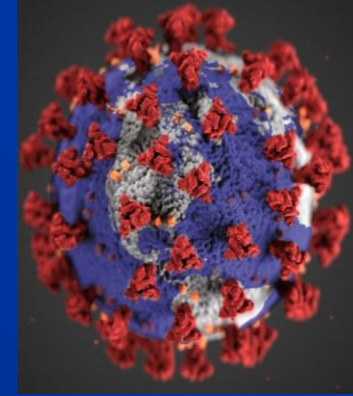


IEEE Oakland/East Bay Section Chapter Officer Training Briefing



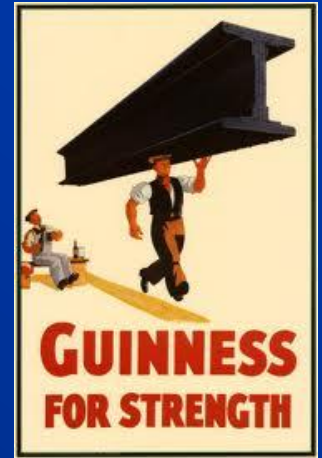
Noon, February 25, 2021
Virtual Covid Edition



- Intro to IEEE
- *Chapter* organization & requirements
- The Four-Year Cycle & Basic Officer Duties
- The Annual Cycle & Annual Planning
- Your “product”: The Meeting Cycle
- Meeting basics and Best Practices
- Choosing a speaker
- Your other chapter “products”

What is the IEEE? The “Elevator Speech”

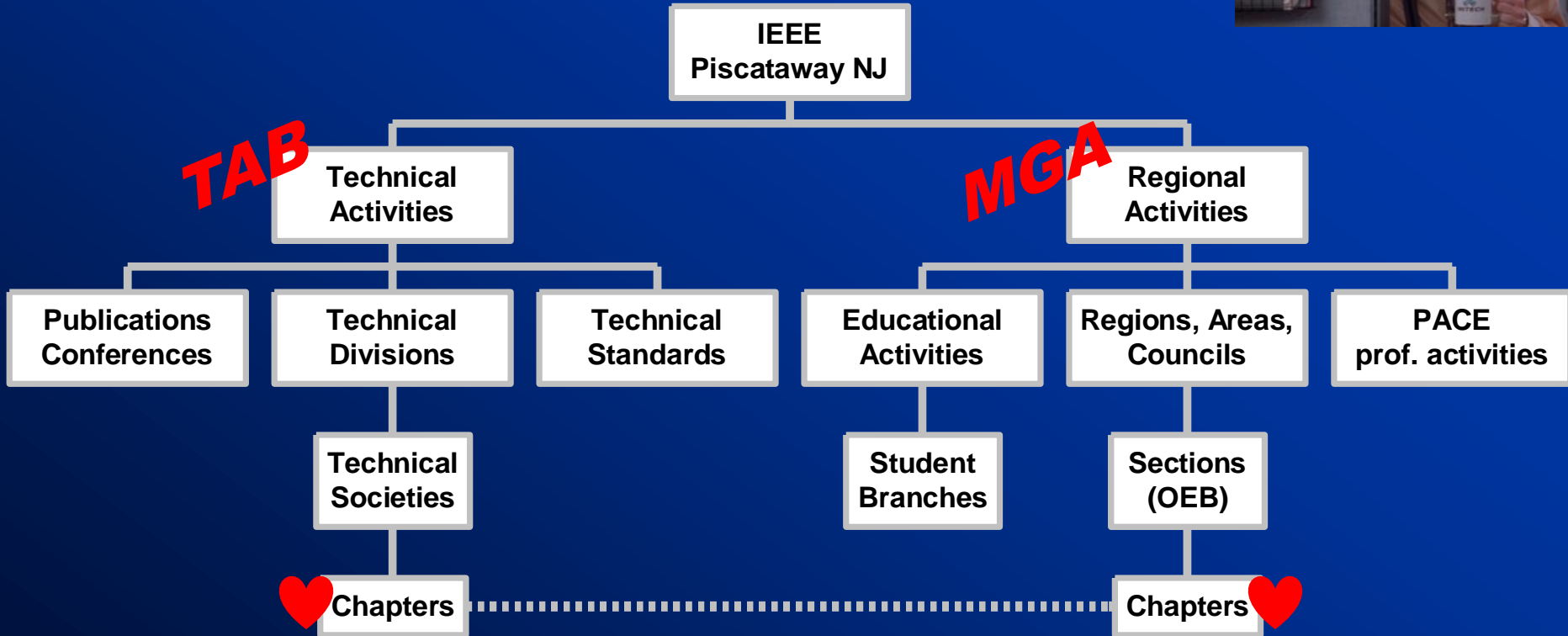
- The World’s largest (>421,000) technical professional society
 - >800 active standards; >100 periodicals; >300 conferences/year;
“responsible for 30% of the world’s knowledge”
- Our charter:
 - “Scientific advancement and diffusion of knowledge”
 - “Advancement of the profession” (our careers)
 - “Use skills to enhance the quality of life for all people”
- Our strengths:
 - 10 Divisions, 39 active technical Societies & 7 Technical Councils*
 - Peer-reviewed Transactions, practical publications, newsletters
 - International conferences & workshops, published proceedings
 - 2116 chapters in 334 sections; grassroots member involvement
 - Professional advancement, support; networking; career benefits



Local

You are part of something big. Welcome!

Yes, IEEE has an org chart!



- Chapters are where it all comes together!
- As a Chapter Officer, you are key to IEEE's success

The Big Picture: Why be an IEEE Chapter Officer?



- Title looks good on a resume
- Your boss gets credit for your *pro bono* work
- Meet new people, network, increase contacts
- Fulfill a professional duty; set an example to others
- Learn planning, negotiating, motivation/recruitment, team building...these things help YOUR career
- Path to other opportunities to serve
- Serve your profession; improve the world's leading technical professional society

***So how do you make your chapter
all it can be?***

A Key Concept: The 3 nested IEEE Timescales



- **The 4-year Cycle**

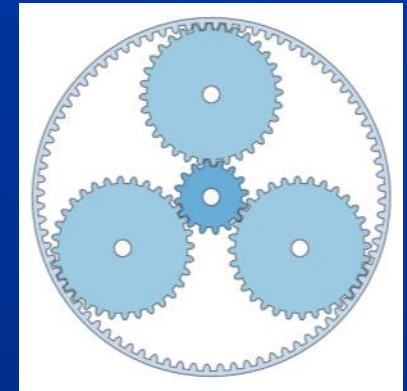
- Normal officer succession is Treasurer, Secretary, Vice Chair, Chair
- Office terms are 13 months, with 1-month overlap for transition
- Learn the job, do the job, teach the job, move up (to MGA or TAB)
- No recycling, a 4-year commitment (not a life sentence) that helps everyone

- **The 1-year Cycle**

- Officer Training, Officer Reporting, Annual Planning
- Plan, Publicize, and Hold 4 technical talks
- Represent your Chapter at the Section level
- Accomplish other chapter goals
- Recognize, Thank, and Recruit volunteers, esp. next year's Treasurer

- **The Meeting Cycle**

- Approx. two months in duration
- A 4 mtg/year pace prevents overlap
- Know who does what to make successful meetings happen



Chapter organization & the 4-year cycle

- Treasurer (**numbers**)
 - Learn your job in January (from last year's Treasurer)
 - Do your job (nsuploads) for 13 months)
 - Learn your next job
- Secretary (**words**)
 - Do your job (minutes, actions)
 - Learn your next job
- Vice Chair/Speaker Coordinator (**people**)
 - Do your job (recruit & promote speaker)
 - Learn your next job
- Chair (**vision**)
 - Do your job (promote the chapter & its volunteers)
 - Find your successor; next year's Treasurer



Suggested officer progression/rotation

Local Chapter Officer Duties in detail



Highly suggested officer progression/rotation

- **Treasurer**
 - Pay the bills, maintain the checkbook & other finances
 - Track assets (cash-on-hand, computer eqpt, coffee pot...)
 - Communicate performance-to-budget to other officers
 - Prepare next-year's budget with at least one level of categories (previous year includes "forecasts" in Nov/Dec, updated to "actuals" in Jan)
 - Provides yearly financial reports to your Section or direct to HQ
 - Coordinates the other Compliance Reports
- **Secretary**
 - Tracks member/guest meeting attendance, typically via sign-in sheet
 - Finalizes (with attendance) Meeting Reports via vTools
 - Maintains a member/guest database (past attendees) & knows OUAalytics
 - Takes & maintains "minutes" for all mtgs, incl. Action Items, & Annual Plan
 - Maintains the **Speakers List** of past & potential speakers
 - Handles meeting publicity...eNotice, mailings (emails and posters)
 - Default webmaster
- **Vice Chair/Speaker Coordinator**
 - invites, coordinates, and introduces technical speakers
 - Assists in publicity (Grid) and reserves venue
 - back-up the Chair (when Chair is absent, whether physically or...)
 - Learning & cultivating The Vision Thing (Expert in OUAalytics, Dashboard)
- **Chair**
 - Calls & chairs meetings, enforces The Plan (annual & mtg cycles)
 - Sets agendas, appoints committees, gives awards, sets TONE
 - Nurtures/recruits volunteers; runs and reports a yearly election
 - The conduit to, and representative of, the Section
 - Responsible for a chapter satisfying all IEEE requirements
 - Responsible for seeing everything above this bullet gets done!



The IEEE Chapter Offices in 1 slide

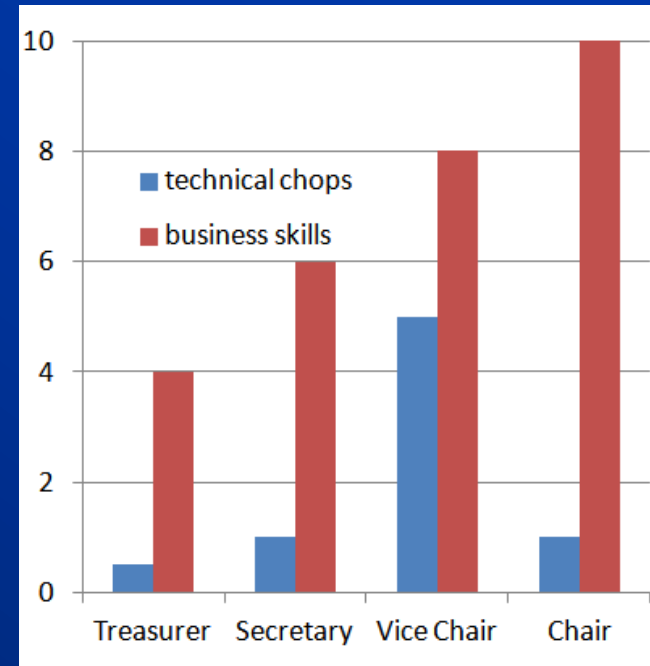
The Office	Key Idea	Key Responsibility	Key IEEE doc produced	Key IEEE Tools	Key Goal
Treasurer	Numbers (\$)	Concentration Banking acct.	Annual Financial Reporting	ieee.org/concentration	Early Bird Section Bonus
Secretary	Words	“Speaker List”; website	Meeting Report	vTools Events; vTools Web Hosting	Chapter Rebate
Vice-Chair	People	Speakers	E-Grid announcement	OUAnalytics, eNotice	Well-attended Technical Meetings
Chair	Vision	Succession	Officer Reporting Compliance Docs	vTools Voting; Awards	A New 2022 Officer

- **Treasurer: Numbers.**
Count the beans. Don't go broke. Know & follow the rules.
- **Secretary: Words.**
Record the actions, write the history, keep the records, set the tone.
- **Vice Chair: People.**
Speakers—your Chapter's Product! Invite, motivate, close the deal.
- **Chapter Chair: Vision.**
Plan and lead meetings. Find & motivate people. Frame the future.



IEEE chapter offices have business analogs...

- Treasurer: **Numbers**. Counting the beans. Standard accounting practices. Learning (and communicating) the applicable rules.
- Secretary: **Words**. Writing the history, recording (and reminding) the actions, setting the tone.
- Vice Chair: **People**. Inviting (and motivating) speakers, negotiating skills, closing the deal.
- Chair: **Vision**. Planning & leading meetings (your product!) Finding and motivating volunteers, framing the future.
- So a successful *IEEE* career covers all the organizational skills from Engineering, to Project Management, to Management Leadership, to Executive Administration
- This **will** help your career, either *into* a business direction or *away* from it. (Know the enemy!)



The 3 “Forms” that define an active Chapter



The year's progression of time

- Plan the year
 - Account for money & assets *New & Old Treasurer*
 - Financial reporting, CBRS **nsuploads**, compliance docs
 - Finalize budget, special initiatives, no. of meetings
- Hold meetings
 - Decide/Invite/Coordinate speakers
 - Promote/advertise the meeting
 - Make each meeting special
 - Special initiatives
 - Volunteer recognition/recruitment
 - Complete ≥ 2 **Meeting Report Forms** *Vice Chair, Secretary*
- Ensure future success
 - Find your successor, hold an election *Old or New*
 - Report results: **Officer Reporting Form** *Chair*
 - Prepare a budget

All 3 forms accessed via
<https://site.ieee.org/vtools/>




Speaking of Officer Reporting...

- Due ASAP, another Jan-Feb task like financial reporting
- Use the Officer Reporting Form at sites.ieee.org/vtools
Your Society (TAB) depends on this info as well!
- So who does this reporting?
 - Some say outgoing (old) Chair
 - Some say incoming (new) Chair
 - Some say the Teller's Committee (whoever ran your election)
 - If you use vTools for your election, you might find an auto-report function...
 - Or just go back to [ieee.org/vtools](https://www.ieee.org/vtools)
- Just do it! (You'll need **membership numbers**.)
- You did all **pay your dues**, right?
- And let your Section officers know—they'll need a roster and may fwd it to the Grid—both TAB & RAB harvests their info here



Planning is the secret of success

- The trick is planning your technical meetings (TM's)
 - Play it safe: plan 2 before summer and 2 after
 - If you miss one (or both) you'll still survive as a chapter
 - What follows is an “odd month” plan with January & July “off”
 - Note the events happen serially—no parallel processing!

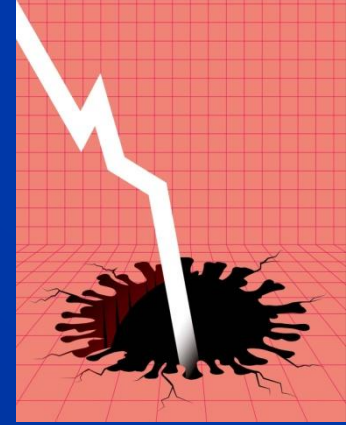
- January:  Outgoing Chair submits Officer Reporting
Five officers attend Officer Training;
ExCom Kickoff; approve annual budget/**Plan**, **plan 1st TM**
- Early February: Treasurer submits last year's NS input to section/HQ
- **Mid-March:** 1st Technical Meeting
plan 2nd meeting
- **Mid-May:** 2nd Technical Meeting
plan 3rd meeting
- **Mid-September:** 3rd (penultimate) Technical Meeting
next year's officers solidifying
plan 4th meeting
- **Mid-November:** 4th (final) Technical Meeting
Promote your election (and its volunteers!)
Prepare a **Budget**/plan for new year
- December: Election close, Section Banquet, “good job”



AP



Basic Questions about your meetings with no wrong answers...But you do have to answer them. Now!



- Excom Planning Meetings
 - ♥ – *before the TM? (*least action*)
 - after the TM? (*esp. if TM is a dinner mtg.*)
 - separate from the TM? (*for the well-oiled chapter*)
 - virtual? (*Recommended only if you have a prioritized list of speakers*)
- Where?
 - ♥ – *corporate locales, *colleges, public libraries, govt labs, local restaurants,
 - Consider ease-of-commute, nearness to commuter hubs, central locations
 - Everyone loves an on-site tour (provide good directions)
 - Ask your section for their “Preferred Venues” document
 - Avoid getting in a rut; choose 1 meeting per year outside of your norm
- When?
 - 6 pm (“right after work”; natural time for dinner meetings)
 - ♥ – *7 pm (permits a burger stop beforehand; lighter traffic)
 - Noontime (weird, but works for some “close-knit” chapters)
 - Be aware of other issues (conferences, holidays, summer, etc)
- Food
 - ♥ – *nothing? (*least action; partic. for younger chapters*)
 - snacks? (*marginally more work, limits venues?*)
 - dinner? (*for the well-oiled chapter; give price breaks for IEEE members*)



The Annual Cycle

Do loop n=1,4

The Meeting Cycle

When	What	Who
15-Jan	Download 12 CBRS nsuploads, add GL codes, email to nsbankupload@ieee.org	Treas
19-Jan	Attend Officer Training	All
20-Jan	Call & Chair Kickoff Excom. Review BQ; approve an AP.	Chair
30-Jan	add GL codes to nsuploads, email to nsbankupload@ieee.org	Treas
15-Feb	forward nsupload receipt email from HQ to Section Treasurer	Treas
15-Feb	Download any Compliance Docs and route for signature	Chair
28-Feb	Submit any Compliance Docs	Chair
TM-57	Contact next speaker. Request abstract and Biography	Vice
TM-45	Edit abstract & bio for general audience. Email to s.l.winkler@ieee.org for Grid	Vice
TM-45	Fwd abstract & bio to Secy	Vice
TM-44	Update chapter website with Speaker info, location, parking	Secy
TM-43	create/clone meeting in vTools Events	Secy
TM-15	Create a flier (w/ map) for next meeting. Email w/ request: Please Post	Secy
TM-12	E-notice submission	Secy*
TM-7	Second email	Secy
TM-7	Log into CBRS and note balance. Any issues? Prepare excom Financial report	Treas
TM-5	Speaker reminder. Prepare a verbal introduction of speaker.	Vice
TM-5	Prepare attendance sheet for members, provide minutes/SL to officers	Secy
TM	Attend mtg; take minutes, "take attendance"; update SL	Secy
TM	Attend meeting; bring any snacks, report on Performance-to-budget	Treas
TM	Attend meeting, Chair excom; welcome all, give pitch	Chair
TM	Attend mtg; introduce/care for speaker; Know Plan ABC from Excom	Vice
TM+1	Submit attendance in vTools Events	Secy
TM+1	Thank-you to speaker	Vice
TM+1	Thank-you to venue host or others	Chair
TM+2	update chapter email list w/ new attendees; write up minutes/SL	Secy
31-Oct	Finalize Succession Plan	Chair
31-Oct	solicit Budget input	Treas
15-Nov	Election opens	Chair
30-Nov	Finalize/Approve Budget	All
15-Dec	Election closes; announcements made	Chair
31-Dec	Submit Officer Report	Chair

The Annual Plan in detail

The local chapter Technical Meeting is our “main product”



- What sets us apart from ASME, APS...
- The only IEEE *technical product* for many members.
- The only IEEE *interface* (network) for many members.
- Free. No conference registration. No page charges.
- Desired Outcome: make people willing to pay dues.
- The LifeBlood of MGA ❤️
- The Speaker Coordinator is the engineer of this train
- The Vice Chair is ideal choice for the SC
- The Secretary is the chief advertising assistant
- The Treasurer pays any deposits, bills
- The Chair is the backup to any of these



“Best Practices” Agenda for a Chapter Meeting



<u>Who</u>	<u>What</u>	<u>How long</u>
Excom	Eats (coffee, snacks, dinner, slides in BG)	10-45 mins
Chair	Host recognition, logistics	2 minutes
Section rep.	IEEE pitch & Excom recognition	3 minutes
Chair	Basic biz (news, networking*, <i>election</i> , etc)	5 minutes
VC	Speaker intro.	3 minutes
Guest	Technical presentation ❤️	45 minutes
VC	Leads applause, fields questions	~10 minutes
VC	Presents Thank-you Gift	2 minutes
Chair	Adjourns meeting	1 minute
All	Informal networking	10 minutes

**Gotta' job/Wanna' job (might need kick-starting by someone from the Consultants Network)*



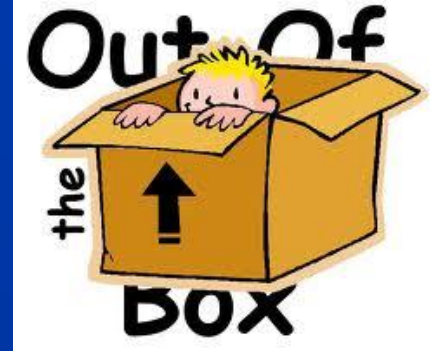
Choosing a speaker is the main purpose of Chapter planning (Excom) meetings

- Don't break the rhythm or your schedule is shot
- Keep and maintain a **past & future Speaker List**
 - This is your chapter's most important document
 - Don't have one? Create one from historical reports!
 - The Past Speakers section includes date, location, attendance (at end)
 - The "Next Meeting" part should be prioritized (Plan A,B,C) at top
 - The "Future Talks" part should be fat. Update for deaths, etc.
- If your list is long, could you do this just once a year?
 - The actual success/failure of one meeting might influence who you invite to successive meetings
 - Frequent planning meetings allow feedback/course correction to the speaker coordinator (Vice Chair)
 - You don't want them burning bridges
 - You don't want them developing their own agenda
- Updating the prioritization of the future speaker list is the main purpose of planning meetings.
 - But don't overlook budgeting, workshops, outreach, succession planning, recognition etc...all the sizzle



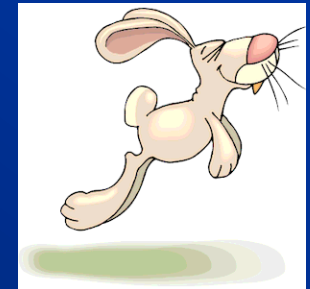
Choosing a technical speaker

- Candidates:
 - A colleague (or manager) of an Excom member
 - A *competitor* of an Excom member
 - An Excom member (best to keep this as an ace up your sleeve)
 - A previous speaker (but at least 3-year spacing)
 - A local “applications engineer” (use with caution)
 - Everyone loves a tour! Pick the organization; find a speaker therein!
 - A “Distinguished Lecturer” in your Society? \$ need not be a problem
 - Generally avoid dry speakers or those with annoying characteristics
 - But knowledge trumps entertainment (experts needn’t have PhD pedigrees)
 - But inform the “more practical” about the IEEE professionalism rules
- Questions worth asking:
 - Who or what is a “draw”? Attendance is a metric.
 - Who is *different*? Maintain a variety of disciplines; topics, & styles
 - What feedback are you getting? From regular attendees, members, other officers
 - What do you want to learn? What would you like to see (tour)?
 - Piggyback with other local chapters or universities
 - Ask previous recent speakers (a form of complement!)
- Need help?
 - Who is recommended within your society?
 - Who is recommended by neighboring/other chapters? (Section/Council participation)
 - Trade lists with another chapter; hold a joint meeting
 - Attend conferences in the field (Poster vs. oral speakers)
 - Be aware of local conferences to minimize travel expense for non-virtual meetings
 - Ask your members, since nmembers >> nofficers (at meetings, via email)



Chapters & Money

- **Concentration Banking** www.ieee.org/concentration
 - Get rid of outside bank accounts—avoid extra forms for your CB
 - Know your **Hop Number** in order to e-transfer \$ within CB
 - You should have a credit card, paper checkbook, deposit slips.
 - You can make deposits (even with Wachovia slips) at any Wells Fargo. (I suggest having them write your Hop in the Serial Number box)
- Know your **Friends**
 - Stacey: s.negron-sheckells@ieee.org to add/delete officers, get ATM cards
 - Susan: s.manno@ieee.org for transfers, balance questions
 - And know your Hop number!
- **Money makes a great slave but a lousy master**
 - Most IEEE entities over-emphasize the importance of \$
 - Why would you need cash reserves of more than a few years?
 - View \$ as just one **tool** to help you serve your members...



Other Tools of the Trade

- sites.ieee.org/vtools

- Same site credentials as paying your dues
- Report officer changes (Officer Reporting)
- Schedule a meeting / submit meeting reports **EVENTS!**
- Submit eNotice's (the "automatic" way*) and ListServ's
- Setup (and vote in) an election
- GoogleApp's, Surveys ("Checkbox"), and scheduling Doodles
- OUAalytics (Vitality Dashboard, SamIEEE "Lite"?)
- WebEx & Remote conferencing (Camtasia) support
- Create Web-in-a-box/WordPress webpage
- e-notice, etc questions: Khanh Luu k.n.luu@ieee.org

IEEE MGA vTools



- **Grid submissions:**

- Sandra: s.l.winkler@ieee.org
- ewh.ieee.org/council/sfba/
- Understand the SFBA Council (and your Section)

IEEE GRID



- **Stuff !**

- Treas USB stick with Financial files; Checkbook, Deposit stamp/slips/envelopes, & CC
- Secy USB stick with Minutes, Speaker List, Publicity files (Webmaster files)
- VC USB stick with Thank-you letters and certificates, Speaker List, Publicity files
- Chair USB stick with Award certificates, CC, and all-the-above
- All property...coffee pots, projectors, telecon eqpt, etc...tracked by Treasurer

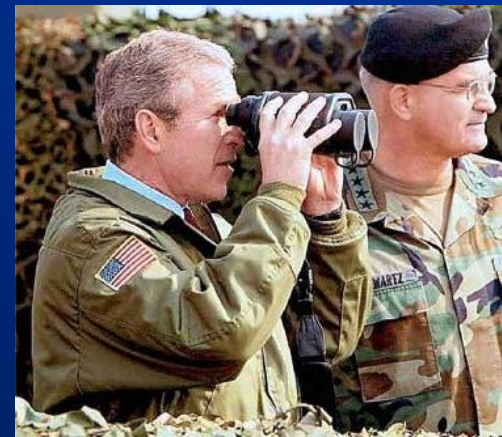
- **Seriously, don't forget People Skills**

- The *rule* is just The Golden Rule. And engineers do tend to be nice.
- The *trick* is to tune in to what makes us feel happy/fulfilled, appreciated/valued, motivated/inspired
- *This* is the Vision Thing



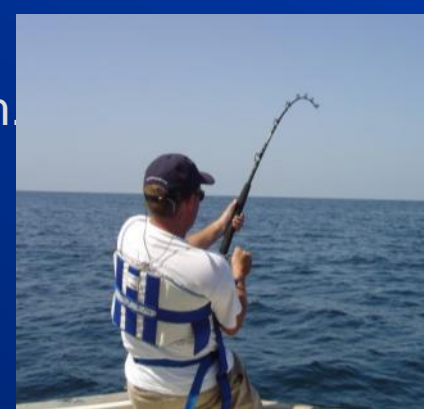
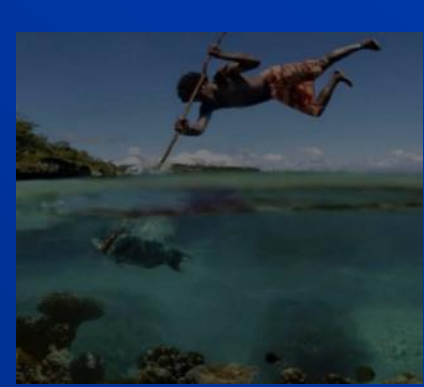
About the Vision Thing...

- Meetings (speakers + info) are your main product—the steak. But the emotions people leave with from your meetings are the **sizzle**.
- Officers/leaders must be **positive/glad/thankful**—it’s contagious.
- Don’t analyze the physics of emotions. Just *inspire*--breathe deep. Smile.
- Give little jobs to potential future volunteers. “*Wouldn’t it be great if we had some cookies next time?*” “*Who can make a poster?*”
 - If they follow-through, give an appointed position—create a AAA farm team
- IEEE empowers you to create awards, positions (Titles!), acronyms; you can buy certificates and plaques
- **Honor** your existing officers EVERY MEETING. Don’t talk about Netsuite uploads...talk about how wonderful it was that your Treasurer “figured it all out so we can have great meetings like this”.
- Life happens...and you might lose an officer mid-year.
 - The Vice Chair is a well-trained officer who can adapt.
 - Use the 4-yr officer rotation so others are cross-trained.
- But **recruit one new officer** per year.
- So how do I find these volunteers?

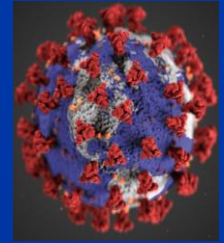


Need volunteers? Go Fish!

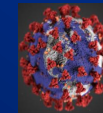
- **With a net**
 - Announce a need for volunteers at your first meeting
 - Use eNotice for an email. List some specific tasks, like Membership Chair, that you have a backup for. List your “entry” office for next year. Reference your job descriptions. Make it easy to reply to you.
 - Ask trusted people for recommendations. “Keep an eye out for someone” and follow-up.
- **With a spear**
 - Spot the regulars at your meetings. Take pictures and look for repeats. By your 3rd meeting, spear ‘em! (Pictures will be great for your website too!)
 - Consider current and past colleagues/speakers. Spear ‘em.
- **With a pole**
 - Ask for volunteers. “Who can bring cookies?” Simple, non-critical tasks. Exchange cards.
 - Do they follow-through? Reel ‘em in.



Chapter Extra Credit: Thrive, don't just survive



- Shoot for monthly meetings (parallel processing required!)
- Chair hosts backyard BBQ for the Excom—long-range planning
- Chair thanks their volunteers with a gift or year-end dinner
- Host a short course/seminar in the Spring or Fall
- Have a summer fling/outing—fun for all (family involvement)
- Take pictures of your meetings, improve your website (but KIS, and be aware of changing privacy concerns w/ facial images, esp. w/ minors)
- Recognize volunteers; Know your Seniors; Honor your Fellows; advance your Members; thank your Hosts
- Host a joint meeting with a less-active chapter in your section
- Support your Section/Council with added volunteers
 - help your Section Chair with Section responsibilities
 - recruit new volunteers for your Chapter—not 1-way!
 - get involved with your section's Student Branches
 - promote your chapter's Chair to a Section or Society officer position
- Participate in and promote community service
 - science fairs, scholarships, Engineer Week visits, etc.
 - help out your SIGHT, PACE, GOLD/YP, LM, WiE, HKN entities
 - This will really sizzle with many of your members
 - Get involved in your Section! **They know this stuff.**



Outreach!

Concluding Advice:

- Be Regular! (irregularity is bad)
 - Meet regularly--your members will love you
 - Create **value**, member satisfaction, volunteers
 - Don't let your chapter won't die
- Use The Plan! Create an annual calendar
 - By Golly, now's a good time to do it
 - Handy-dandy planning chart for a 4-meeting year
Minimum: 2 meetings & L-31's, election & L-10, L-50 input
 - **Then make it happen!**
- Your *product* is valuable meetings; Your "bottom line" is membership renewals, not your chapter's CB balance
- Let your Section know what you need
 - Know your Section Chair; **Chapter Chairs must go to ExComs!**
 - Take (then send) your Vice Chair or Secretary...groom them
 - Coffee pots, cookies, pizza...we have more money than time
 - View \$\$\$ as a mere tool to serve your members!
- Learn more!
 - These slides: <https://ewh.ieee.org/r6/oeb/index.html> (w.dehope@ieee.org)
 - <https://ewh.ieee.org/council/sfba/SFBAC/OfficersTraining.html>
 - <https://mga.ieee.org/volunteer-development> includes link to CLE



