

# Officer Orientation

## Buenaventura Section

**Steven F. Johnson**  
**Senior Member, IEEE**

**May 20, 2015**

# IEEE Mission and Vision

- IEEE's core purpose is to foster technological innovation and excellence for the benefit of humanity.
- IEEE will be essential to the global technical community and to technical professionals everywhere, and be universally recognized for the contributions of technology and of technical professionals in improving global conditions.

# Opening Remarks and Welcome

*Steve Johnson*

# Tonight's Topics

- **How We Tie In to the Broader IEEE – Doug Askegard**
- Section Summary
- The Section Web Site
- Best Practices
- Volunteers
- Fundraising
- Logistics
  
- For Further Information



# Region 6 Spring 2015 Update

Doug Askegard, Region 6 Southern Area Chair

Tom Coughlin, Region 6 Director

May 2015

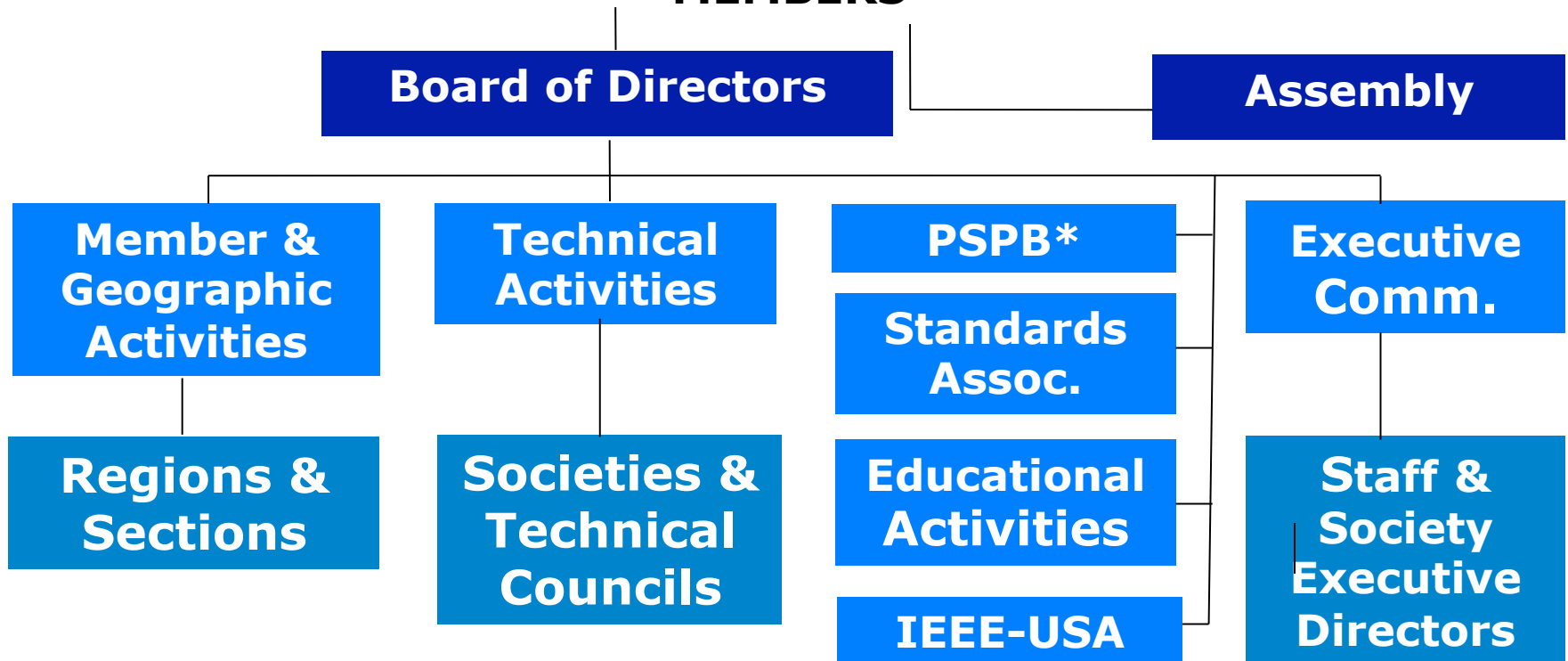
# Outline

- ▶ IEEE Intro Slides
- ▶ Region 6 Initiatives
- ▶ Region IEEE Election
- ▶ 6 Conferences
- ▶ IEEE in 2030 Initiative

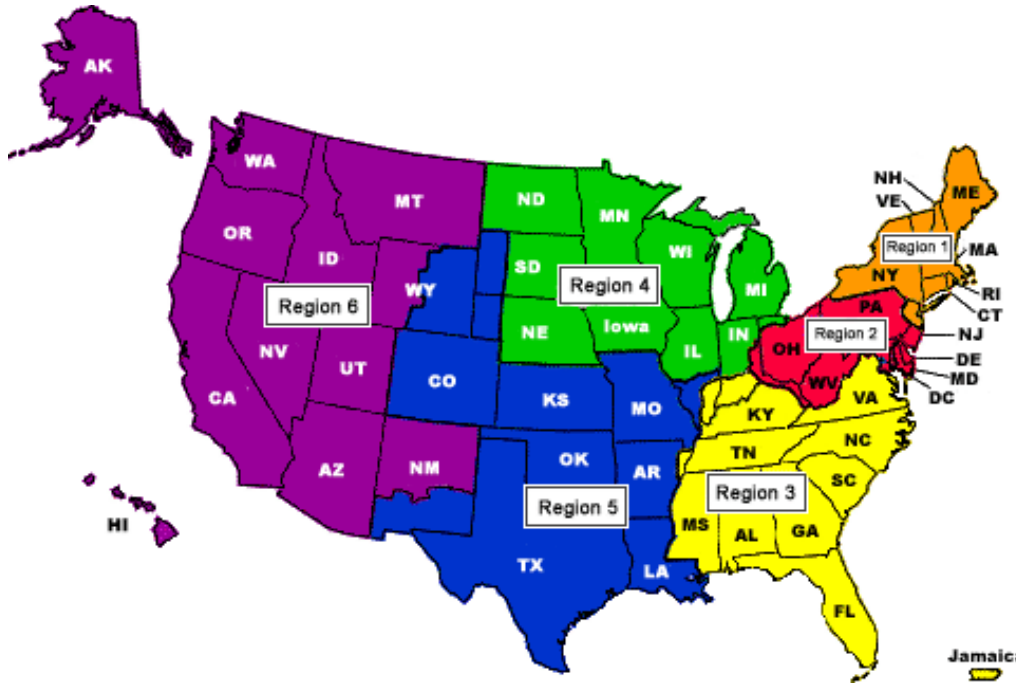
# IEEE Organization



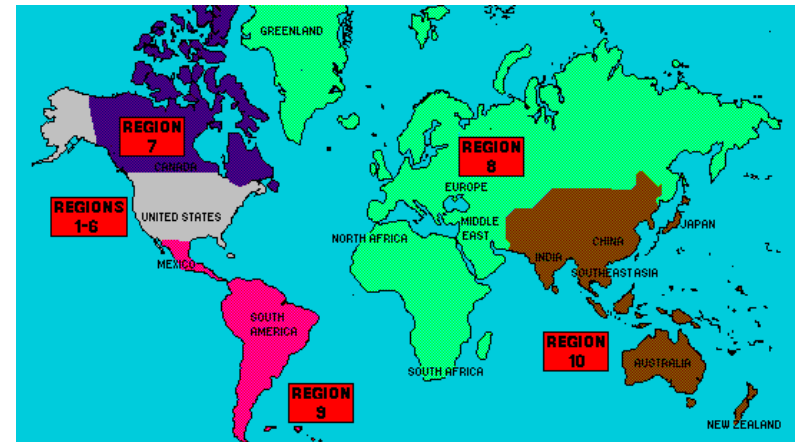
**MEMBERS**



**\*Publication Services & Products Board**



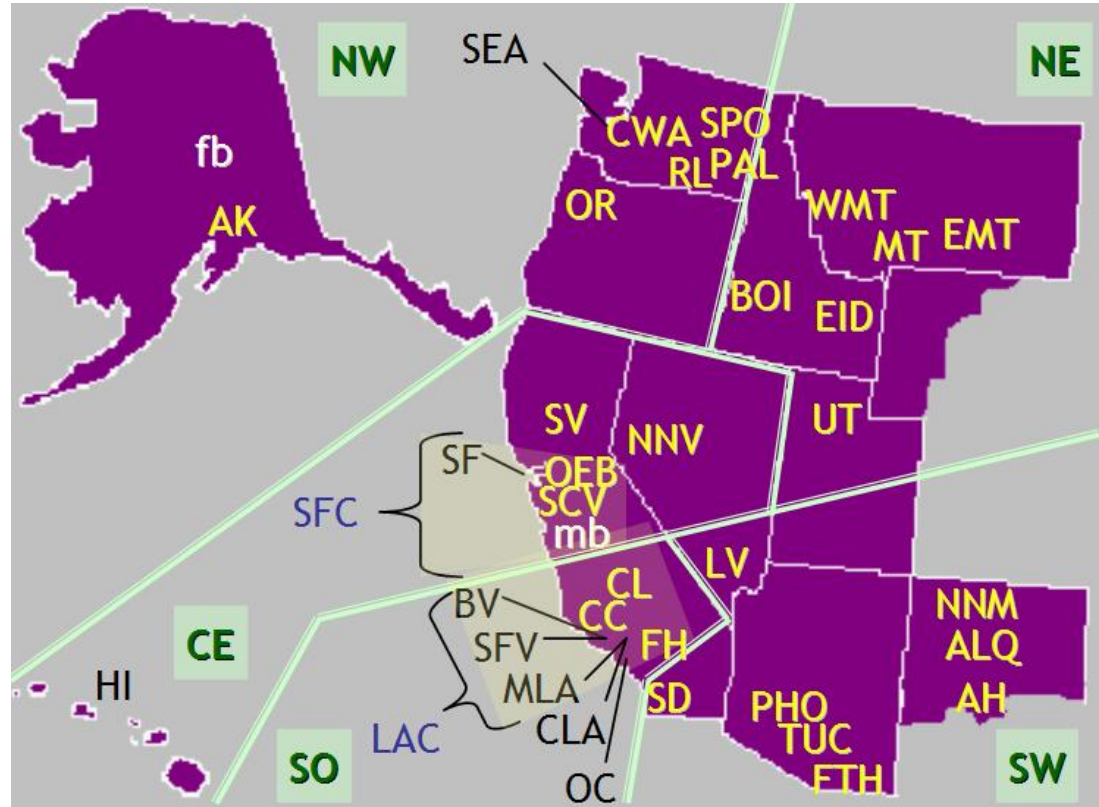
***10 Regions, more than 300 Sections and 1,450 Student Branches, 38 Societies, 7 Councils, plus a growing number of Networks and Communities 425,000 members***







- ▶ 5 Areas
- ▶ 35 Sections, 2 subsections, 2 councils
- ▶ Over 228 chapters and affinity groups
- ▶ 95 Student Branches
- ▶ About 55,000 members



<http://ieee-region6.org/>

# IEEE Region 6 Objectives, 2015

- ▶ Respect and enable the volunteer
- ▶ Enhance membership and improve retention
- ▶ Enhance our on-line experience
- ▶ Create active alliances with industry and VCs
- ▶ Create active alliances with academia
- ▶ Create active alliances with technically oriented cultural groups and STEM
- ▶ Recognize and celebrate our history
- ▶ Make IEEE Region 6 cool, be creative

# Region 6 - Initiatives

- ▶ Membership in arrears recruitment and membership recognition
- ▶ Region 6 conferences
- ▶ On-line conferences
- ▶ Chapter meeting recording
- ▶ Program management for Region 6 activities
- ▶ Creating alliances with industry and academia
- ▶ Student and STEM Support
- ▶ Region 6 IEEE Engineering Milestone Coordinator

# Membership Initiative – Member to Member Renewal

- Towards the end of February 2015 IEEE discontinued membership for folks that didn't renew their membership
- In March 2015 Region 6 began a pilot micro-volunteer program, with IEEE Membership Recruitment, to get IEEE volunteers to sign up to make calls to a list of 10 people in their Section
- An incentive program was created for callers who are able to get discontinued members to renew
- Over 50 people have already signed up to do these calls
- You can find out about this program and sign up to volunteer at: <http://ieee-region6.org/2015/microvolunteer-project-non-renewing-member-survey/>

# Membership Initiative – Elevations

- ▶ Associate to Member elevation information: [http://www.ieee.org/membership\\_services/membership/grade\\_elevation.html](http://www.ieee.org/membership_services/membership/grade_elevation.html)
- ▶ Senior membership elevations
  - Organize local activities to get eligible members elevated
  - This recognizes our members for their experience and may help with retention
- ▶ Sections can order membership loyalty recognition pins from the IEEE, [www.ieee.org/loyalty](http://www.ieee.org/loyalty)

# IEEE Elections (this Summer)

- ▶ There will be the usual slate of candidates running for various IEEE offices, please read their information at: <https://www.ieee.org/about/corporate/election/candidates.html>
- ▶ In addition there is a very important additional item on the ballot, major changes are proposed for the IEEE constitution. I urge you to read the proposed changes in detail and make an informed vote. You can find out more about the proposed amendments and participate in discussions at: <http://theinstitute.ieee.org/briefings/business/proposed-amendment-to-the-ieee-constitution>
- ▶ You can see the actual amendments compared to the current constitution at: [http://www.ieee.org/about/corporate/election/2015\\_constitutional\\_amendment.html](http://www.ieee.org/about/corporate/election/2015_constitutional_amendment.html)

# Region 6 Conferences

- ▶ **WIE-ILC – April 23-25, 2015, San Jose**
- ▶ **Career & Talent Expo (On-line), June 1-30, 2015**
- ▶ **SusTech – July 30-August 1, 2015, Ogden, Utah**
- ▶ **GHTC – October 8-11, 2015, Seattle**
- ▶ **Rising Stars—January 3 & 4, 2016, Las Vegas**



**SusTech**2014



**Women in Engineering  
International  
Leadership  
Conference**

15



# Career & Talent Expo (June 1-30, 2015)

## Schedule

- ✧ Expo – June 1-30, 2015
  - ✧ Career Resource Access – June 1-9
  - ✧ Live Recruiting Sessions – June 10-12
  - ✧ On Demand Event Follow Up – June 13-30
- 
- ✧ Combining 2 highly effective technologies to provide scientific job matching on a virtual platform environment
  - ✧ 14 Industry disciplines showcased in related exhibit halls
  - ✧ Global and national reach – All IEEE members invited
  - ✧ Validated talent assessment offered to all participants
  - ✧ 3 Corporate sponsorship packages available—looking for sponsors
  - ✧ Free to IEEE members, non-members pay or become members both in Region 6 and elsewhere



# Career & Talent Expo

## Member Benefits

- ✧ Free personal skills assessment report provides 7 advantages in career development
  - ✧ Take the DISC [personal skills assessment test at: <http://www.ttisurvey.com///230492JME> and find out what your employable strengths are
- ✧ Supporting career and industry content provided at the event
- ✧ Active and passive seekers, or those looking to build a network for future advancement are all welcome to tap into the world-class resources
- ✧ When job matched, statistics show people have more success
- ✧ Finding the right home for one's unique abilities brings happiness, less stress and more productivity
- ✧ This event will be linked to the Rising Stars in January 2016
- ✧ More Information: <http://ieee-region6.org/2015/career-and-talent-expo-2015>

# Virtual and Hybrid Conferences

- ▶ IEEE Region 6 has acquired a license for a program available from the IEEE EAB for hosting virtual events
- ▶ We used this capability for the first time for the 2015 Rising Stars Conference
- ▶ We plan to make this capability widely available for Region 6 events in 2015
- ▶ This functionality can be used for many different types of events...

# Create an On-Line Collection of Technical Chapter Meeting Recordings

- ▶ IEEE New Initiatives Comm. (NIC) funding of a pilot program in Region 4 and Region 6 into the Fall of this year
- ▶ We will host these recordings—they will be available for free to all IEEE members
- ▶ We intend to sell access to these recordings to non-members--enhance IEEE membership
- ▶ We could have 100's of these in a year's time, 1000's in 5 year's time—this is cutting edge material
- ▶ We are offering discounts for microphone packages and offering Camtasia licenses. We are doing training to Section and chapter leaders—Contact Scott Tamashiro if you are interested in these packages (Scott Tamashiro ([tamashiro@ieee.org](mailto:tamashiro@ieee.org))).

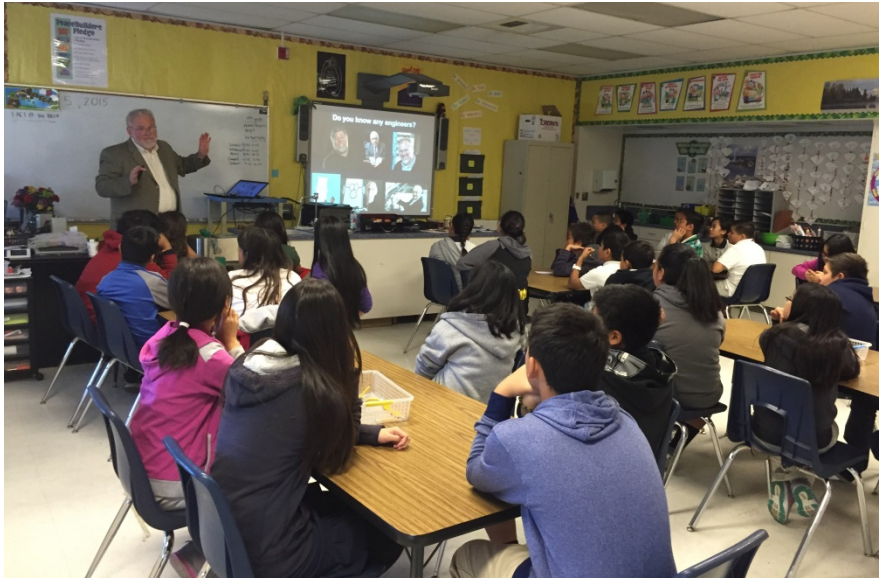
# R6 Precollege Outreach Timeline for 2015

- ▶ January: Commit my Section to SOME outreach
- ▶ February: Identify a PreCollege Outreach Chair
- ▶ March: Region's first mailing / mail list needed!
- ▶ April: Have a plan for a visit, an event, an effort
- ▶ May: Post each Section's plan to Region website
- ▶ June: Execute the visit, event, effort. Take pictures!
- ▶ July: Provide at least one picture to Region
- ▶ September: Post pictures to Region Website
- ▶ October: Encourage further events
- ▶ December: Recognize the Pt, Au, and Ag Sections!

# Many of our Sections have reported their Precollege Outreach Chairs!

<b>Section Name</b>	<b>PACE/Pre-College Contact</b>
Albuquerque Section	Gilberto Zamora
Boise Section	Kristen Hopper
Buenaventura Section	Robert Rumer
Central Washington Section	Randall Groves
China Lake-Bakersfield Section	Octavio Escobedo
Coastal Los Angeles Section	Shantaram Vasikarla
Eastern Idaho Section	Hope Forsmann & Jake Gentle
Foothill Section	Raymond Roberts
Fort Huachuca Section	Keith Moore and Ann Hartfiel
Oakland-East Bay Section	Bill DeHope
Orange County Section	Adriana Cardenas
Richland Section	Jereme Haack
San Diego Section	Kesh Bakhru and Mike Davis
Seattle Section	Alon Newton
Utah Section	Dan Christensen

# Examples of Section events



- Oakland/East Bay Section: Spangler Elementary Engineer Visit



## ► Buena Ventura Section: STEM Career Night

Send your event to:

**rameshnair@ieee.org**

Ideas for outreach at  
<http://ieee-region6.org/k-12-programs/>

# Other Initiatives

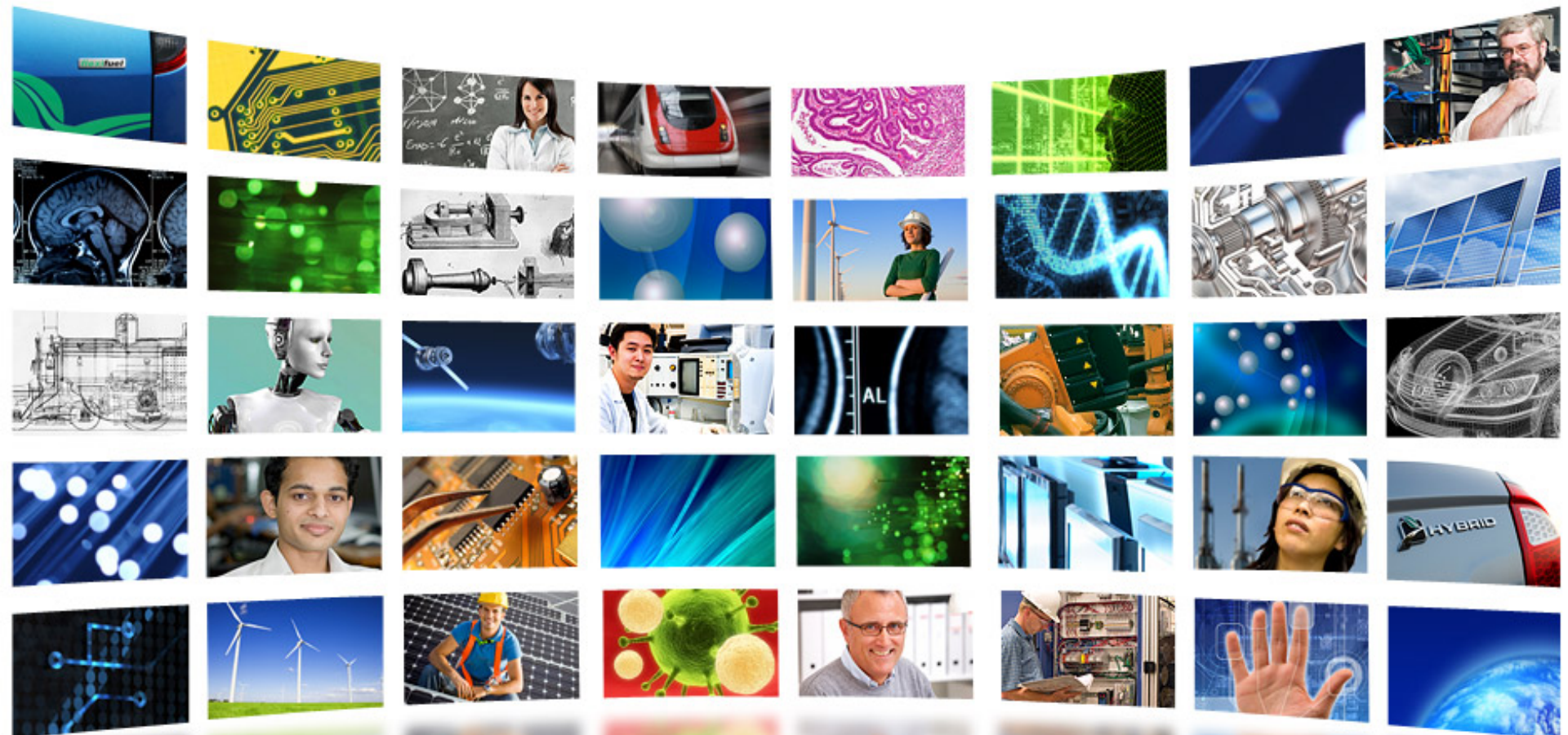
- ▶ We are trying to use **project management tools** as well as micro-volunteering to make it easier for professional volunteers to help Region 6. Karen Day from the NW area is helping us with this.
- ▶ Region 6 has money available for local Sections to **host breakfasts or lunches with local industry** leaders. In the Santa Clara Valley Section they do this about once a quarter with about 30 companies participating
- ▶ Region 6 leaders are seeking **IEEE Engineering Milestones in Region 6** and there is a Region 6 Milestone coordinator who can help you with this process—Brian Berg, [brianberg@gmail.com](mailto:brianberg@gmail.com)

# ***Your IEEE Resources***



- **ieee.org**
- **ieee-usa.org**
- **ieee-region6.org**
- **students.ieee-region6.org**





***Thank you !***



# IEEE in 2030 Initiative



- ▶ Participants
  - Board of Directors
  - Management Council
  - Selected guests (age, geography and technical diversity)
- ▶ Supported by the 2015 and 2016 IEEE Presidents to focus on how best to evolve IEEE to meet the diverse challenges of the world in 2030
- ▶ Driving question: What changes must we make now to best position IEEE for success in 2030, while still supporting the needs of technologists between now and then?



# Goals for 2015 (for 2030)

- ▶ Roadmaps will be developed for each of the four Strategic Objectives proposed to the IEEE Board of Directors for adoption
  - Roadmaps will include milestones, owners, budget, etc.
- ▶ Significant progress will be driven by *IEEE Ad Hoc Committee on 2030* on Strategic Objectives 1 and 2
  - [1] Create a Nimble, Flexible, Forward-looking Organization
  - [2] Foster Public Imperatives
- ▶ Substantial work will be adopted by logical “home” Organizational Units, teams, affinity groups, etc. in Strategic Objectives 3 and 4
  - [3] Foster Diverse Technical Communities with Industry, Government, and Academia
  - [4] Empower the Discovery, Development and Delivery of Cutting-edge Products and Services

**Please send feedback to: [feedback2030@ieee.org](mailto:feedback2030@ieee.org)**

# Region 6 Student-Targeted Efforts

- ▶ Improve student branches by improving Section relations with their student branches.
  - Communication and supporting involvement in wider IEEE activities.
- ▶ Improve effectiveness of area meetings for student members
  - Student competitions need to be made relevant and appealing.
- ▶ Career & Talent Expo – June 2015
- ▶ Rising Stars – January 3 and 4, 2016

# Region 6 is committed to STEM outreach

- ▶ Funding for STEM outreach
  - It's our future
  - It can be 3% or 33%...but not 0!
  - Even if it's not YOUR cup of tea--Delegate! *Frequently* but not exclusively, a PACE function
- ▶ Sections provide and communicate options to members, encourage involvement, publicize successes
  - Appoint a Pre-college Outreach Chair
  - Hold at least ONE precollege STEM event in 2015
  - Tell your Region about it!

- ▶ See our website: <http://ieee-region6.org/k-12-programs/>

# Tonight's Topics

- How We Tie In to the Broader IEEE
- **Section Summary – Nathalie Gosset**
- The Section Web Site
- Best Practices
- Volunteers
- Fundraising
- Logistics
  
- For Further Information

# IEEE Buenaventura Section

716 Members

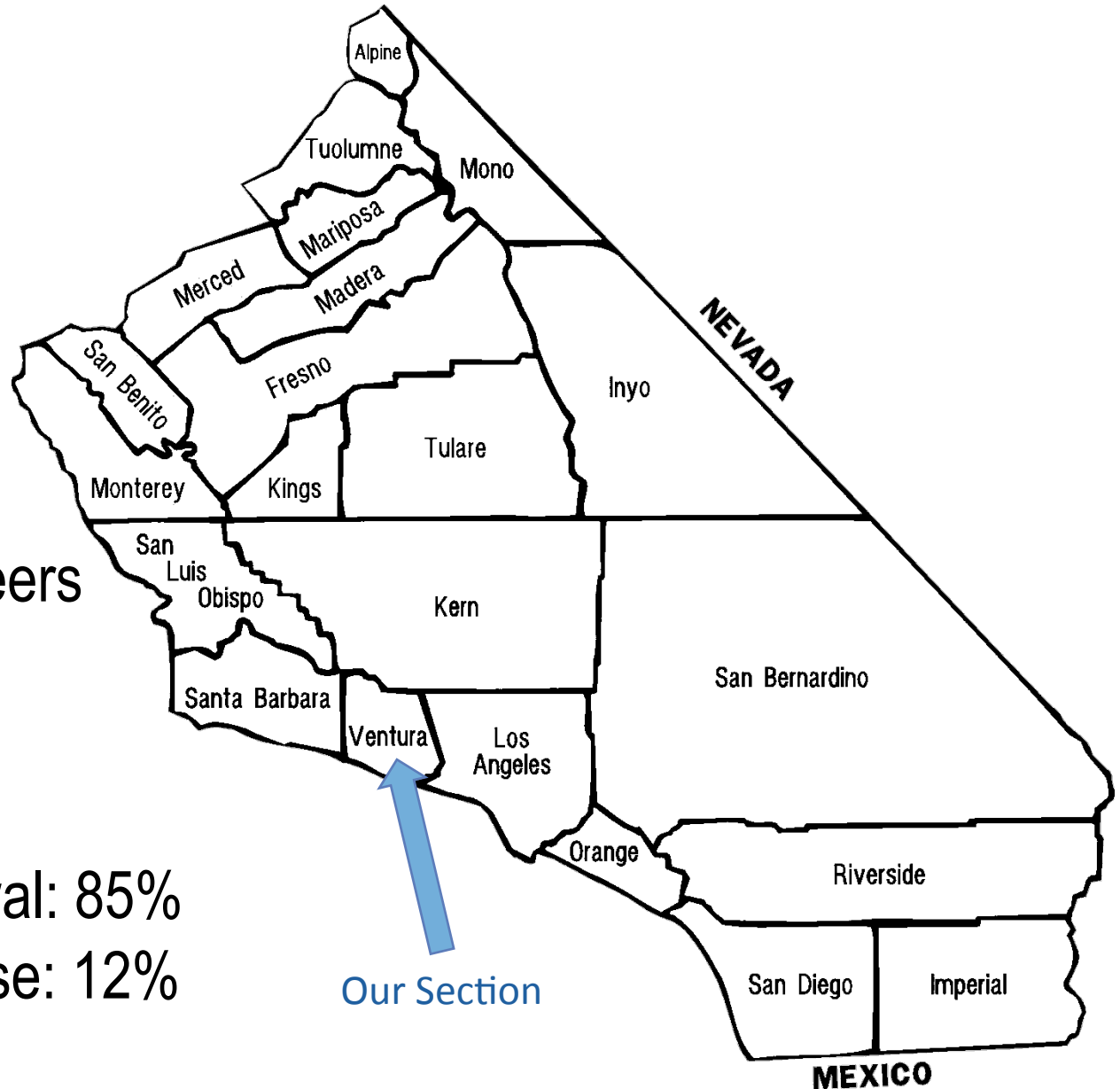
10 Chapters

55 Officers / Volunteers  
NEED 15 MORE

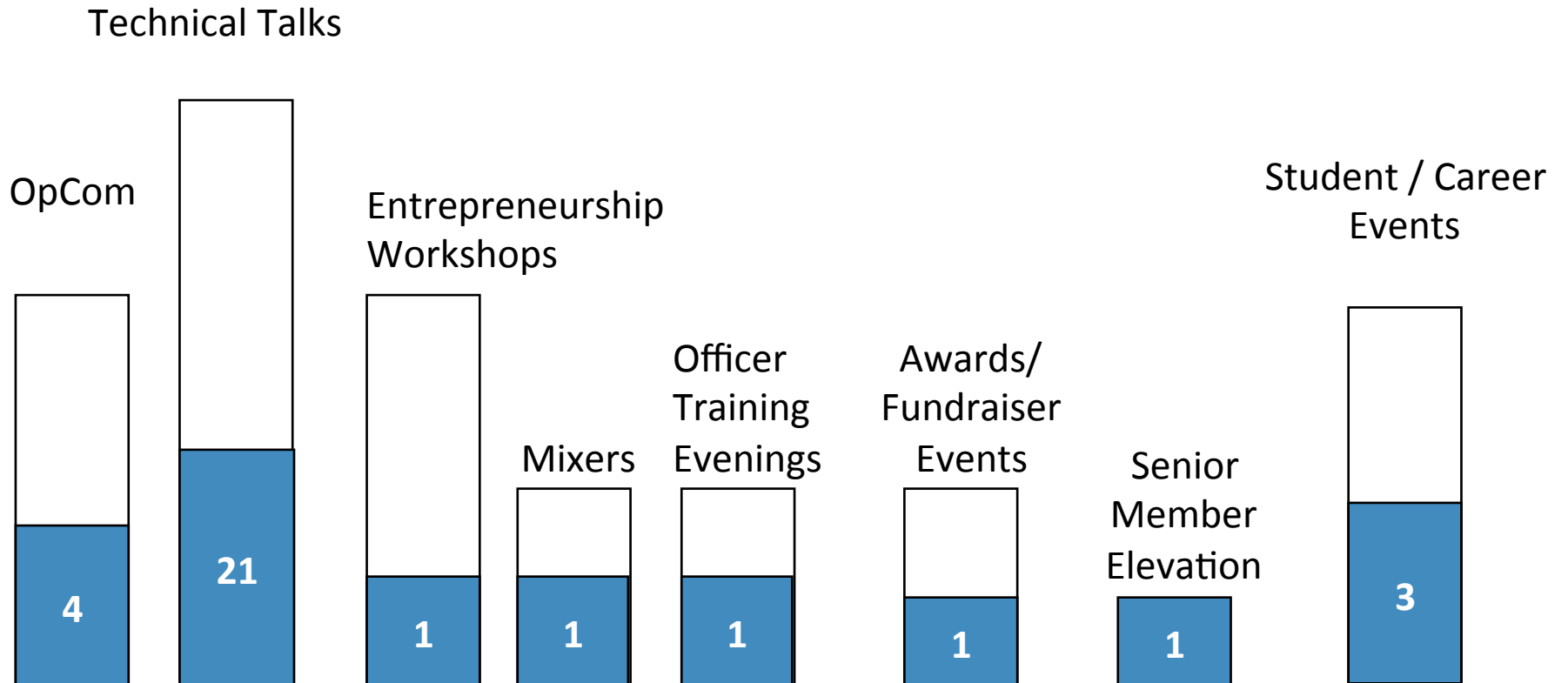
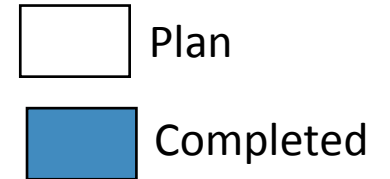
2015

Membership Renewal: 85%

Membership Increase: 12%

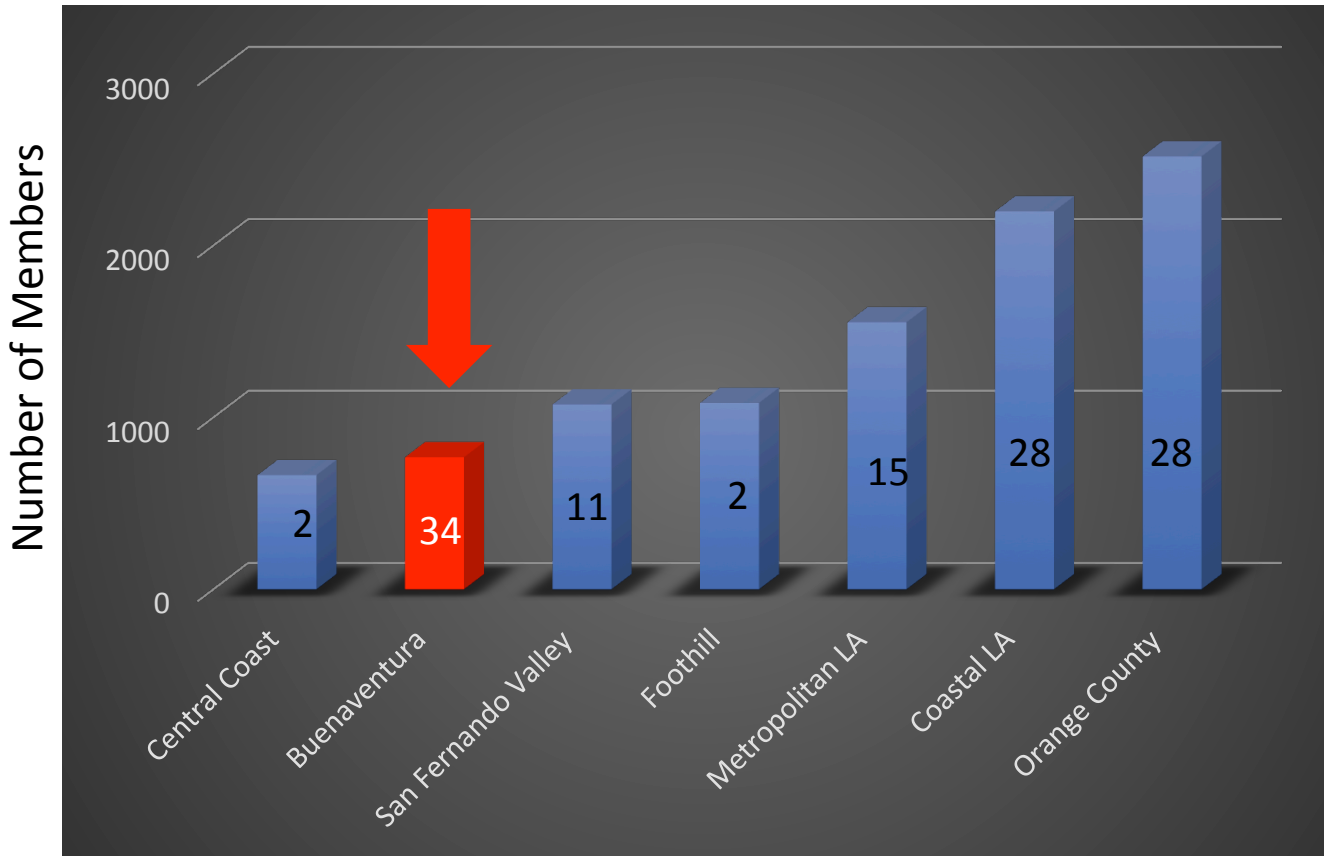


# 2015 Buenaventura Section Activities



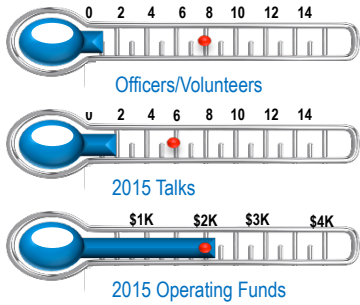


# Why our Section Stands Out

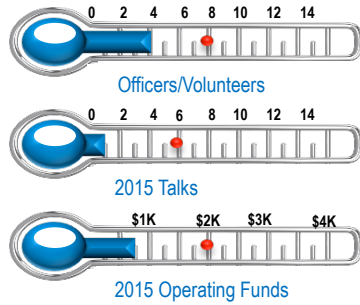


In 2014 the BV Section was the 2<sup>nd</sup> smallest Section (769 members) but the most active Section by far in the Greater LA with 34 technical meetings (number of the columns represents the number of technical events)

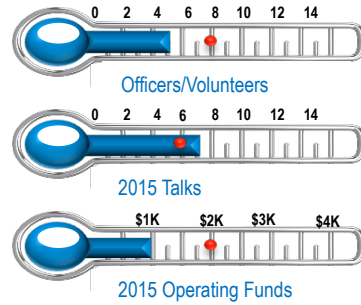
### AESS



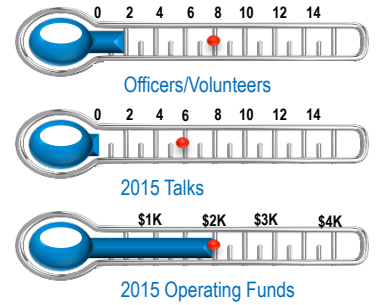
### COMSOC



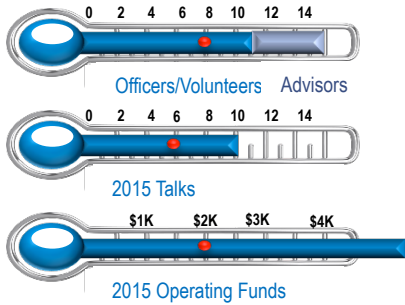
### CS



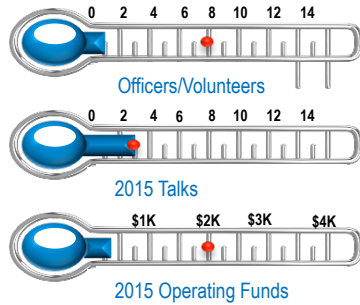
### ED/CAS



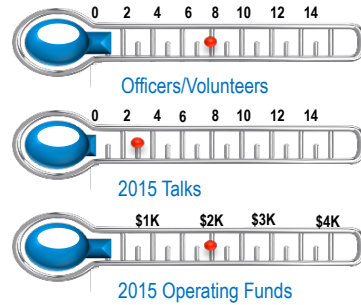
### EMBS



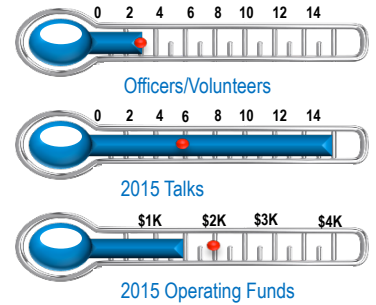
### EMC/CE – New Chapter



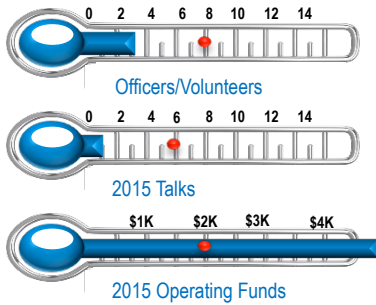
### IPS – NEW Chapter



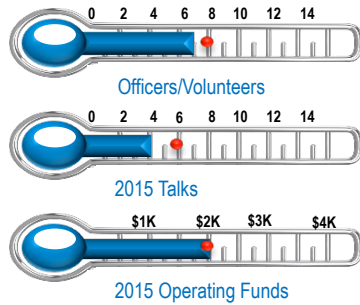
### LMAG



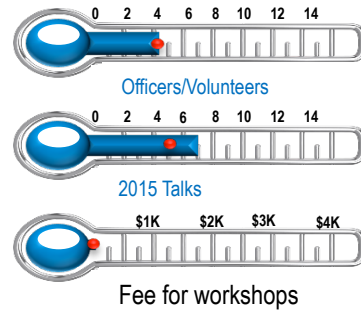
### MTTS



### RAS/IAS



### ENTREPRENEURSHIP



### WEBSITE Team

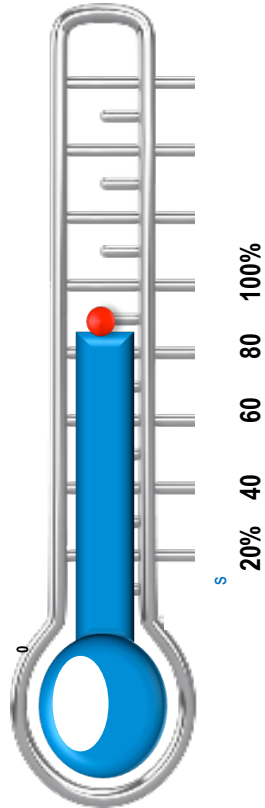


## CHAPTERS 2015 Goals and Actuals

● Goal

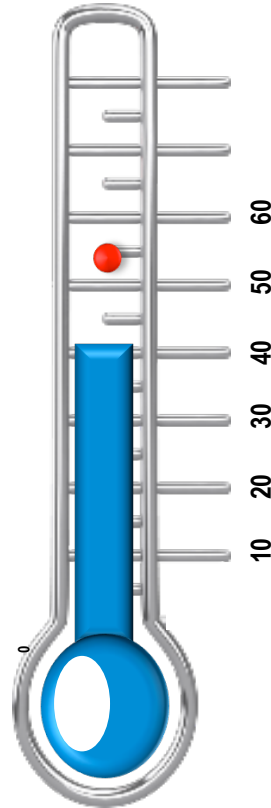
# IEEE Buenaventura Section Metrics

2015 as of May 2015



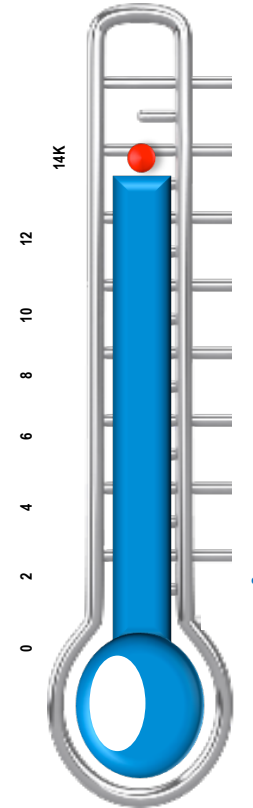
Membership Retention  
Goal 89%  
Actual 85%

*Need another  
members to renew*



Membership Recruitment  
Goal 55 new members  
Actual 42 new members

*Need 13 more members*



Fundraising for Section  
Goal \$13.7K  
Actual \$13.1K

# Collaborations

IEEE

Operations

Groups We Serve

Charitable Outreach

R6

Skyworks

IEEE Members  
High School Students  
College Students

Food Pantry

LMAG

CAIRO

Salvation Army

EMBS

NEWC

## Sponsors

IAS

AAUW

Advanced Personnel Profiles  
California Lutheran University

IEEE

CLU

Ciao Wireless  
Farmers Insurance

Pre-U

CSUCI

Integrity Staffing  
Login Associates

VCOE

MicroJoining  
Syntesis Global

# Changes 2014 → 2015

Microvolunteerism → More volunteers recruited

Website(6 people)

Building teams of 8 officers per chapter

## Empowerment

2015 Plan defined in January

Budget: Upfront allocations

All groups support each other

Advisory Board– Great guidance to solve specific targeted areas

## Amplification of Impact

Focus on the Member

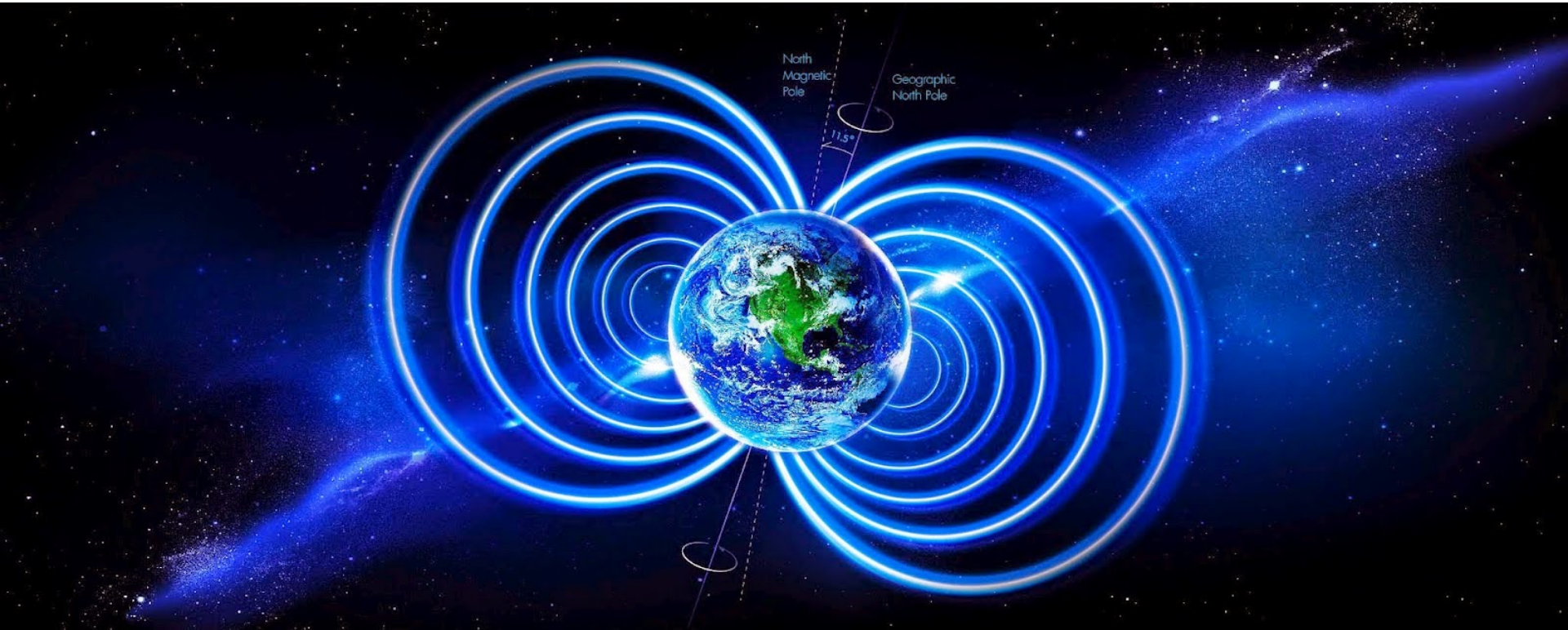
Collaborations with other organizations

Charitable outlet added to events

# Upcoming Large Section Event

Mixer July 22<sup>nd</sup>

Around The Earth: From 60 Days To 60 Milliseconds



# Upcoming Large Section Event

Sep 19<sup>th</sup> (*tentative*)

Introduction to Engineering for Girls ½ Day Workshops



# Upcoming Large Section Event

Sep 24 or Oct 22 – Fall Event

The Hitchhiker's Guide To New Technology Frontiers





# Outreach Activities

- Pre-University
- University
- Industry Relations
- Mentor Program
- Young Professionals
- Professional Transition
- Networking - Mixers

# Tonight's Topics

- How We Tie In to the Broader IEEE
- Section Summary
- **The Section Web Site – Steve Johnson, Deron Johnson**
- Best Practices
- Volunteers
- Fundraising
- Logistics
  
- For Further Information

# Section Website: [ieee-vb.org](http://ieee-vb.org)

*Steve Johnson, Deron Johnson, Team*

- The public face of the Section
  
- Our web team:
  - Steve and Deron
  - Stephanie Knotts, Mrityunjay Kumar, Larry Brown, Rick Poore, Ken Dayton
  
- Monthly editorial cycle follows newsletter
- Ad-hoc notifications
- Section, Chapter resources



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The IEEE Buena Ventura Section is the local volunteer representation of the Institute of Electrical and Electronics Engineers (IEEE), the largest technical society in the world, with 400,000 members. The IEEE Buena Ventura Section is one of the most active in IEEE Region Six, which includes the other Los Angeles-area Sections as well as the rest of California and the Western United States. About 1,000 IEEE members live or work in Ventura County. Our group is a non-profit 401(c)3 organization. [For more information, see the Section Overview.](#)



IEEE at the Ventura County Science Fair



IEEE at CLU Jobs of the Future event



IEEE Computer Society audience

## Events

Date	Event
May 13	<a href="#">Drug Discovery Process and its Automation</a> , by Aleksandar Mladenovic
May 14	<a href="#">Spring Mixer: Rising Stars and Old Nebulas</a> , sponsored by the Buena Ventura Section
May 27	<a href="#">How to Secure Government Funding for your Company: SBIR and STTR programs</a> , Jerry Knotts, California Coast Venture Forum
May 28	<a href="#">Atomic Time in Space, or, When Mickey Mouse on a Wristwatch Just Won't Do</a> , Distinguished Scientist, James Camparo, Ph.D.
June 29 – July 24	<a href="#">Engineering Innovation - Introduction to Johns Hopkins Engineering Class for High School Students</a> , California Lutheran University
December 6-10	<a href="#">IEEE Globecom 2015 - Call for Papers</a>

## News

- [IEEE invites proposals for humanitarian projects](#)
- [Salar Atrizadeh discusses Cloud Computing and Related Laws](#)

## Our Technical Chapters

- [Aerospace](#)
- [Communications](#)
- [Computer](#)
- [Electronic Systems, Circuits, and Systems](#)
- [Electromagnetic Compliance / Consumer Electronics](#)
- [Engineering in Medicine and Biology](#)
- [Life Members Affinity Group](#)
- [Microwave](#)
- [Photonics \(coming soon!\)](#)
- [Robotics and Automation / Industry Applications](#)

## Nearby Sections

- [Central Coast](#)
- [China Lake/Bakersfield](#)

# Tonight's Topics

- How We Tie In to the Broader IEEE
- Section Summary
- The Section Web
- **Best Practices – Steve Johnson**
- Volunteers
- Fundraising
- Logistics
  
- For Further Information

# Best Practices

- How to build up and lead a chapter
- How to find speakers
- How to handle speakers
- What you should expect of speakers, and what they should expect of you

# Building and Leading a Chapter

- The “checklist process” of starting a chapter is pretty straightforward, but when is the time right to do so?
- The IEEE’s process is built around some useful thresholds, such as 12 technical society members in the section, identification of four key officers, etc.
- While you’re meeting the minimum requirements, also take the time to write a two-page “business plan”:
  - What will the objectives of the chapter be?
  - Who is your target professional audience? Is it big enough to sustain 2-10 technical meetings a year?
  - Plan your first year’s speaker list – contact them for informal acceptance of your invitation.
  - Where will you meet? Is it a free venue?

# How to Find Speakers

- Does your organization (employer, university, etc.) already bring in speakers on a regular basis? Invite them to speak at an IEEE meeting as well.
- Who are your professional contacts? Your mentors? Your manager? Your suppliers or customers? Think ***LinkedIn!***
- Ask a colleague if she would like to talk about her work at an IEEE technical meeting.
- Contact the Section Chair for SAMIEEE information about Senior / Life / Fellow members in your technical society nearby.
- What intrigues you? Did you enjoy a magazine or journal article? A book? Invite the author.



# Use The “Magic Invitation”

Dear Dr. [name of target speaker],

We would like to invite you to be the **guest speaker the evening of [specific date]** for an event organized by the **IEEE Buenaventura [Your Chapter]**.

We would love to hear your perspective on [THE TOPIC YOU CHOSE AND THE EXPERTISE OF THE SPEAKER], the challenges that are still unresolved and some of the initiatives you have taken tackle some of the more complex issues.

The event will take place at [location: Skyworks Solutions in Thousand Oaks, or the California Lutheran University in Thousand Oaks, CA].

Our audience is fun and engaged. About fifty IEEE members drive from various part of Ventura County and gather every month in Skyworks’ conference room/CLU Science Auditorium that fills up fast in anticipation of the great talks that take place in the room. You will be welcome by a relaxed, and friendly group all connected by the keen interest in science and technology.

The meeting format includes networking time from 6:30 p.m. to 7 p.m., pizza for attendees, and your presentation from 7 to ~8, typically with 15 minutes of Q/A.

George Bekey, PhD, member of the National Academy of Engineering drove from San Luis Obispo to be with us two weeks ago. Last night, we were fortunate to have Salar Atrizadeh, JD an expert in privacy and the law who was recently on the Larry King Show. Distinguished Scientist from Aero, James Camparo, Ph.D. will be with us on May 28 to talk about Atomic Time in Space. We are so grateful of the interest of these well-known researchers who accept to come, talk, and interact with our audience for the fun of sharing knowledge and interacting with an engaged group.

**Would you join this series of amazing lecturers and being the evening guest speaker on [specific date]?**

Please let me know.

With my best regards,

[Your name]

[Your IEEE function]

A little bit of background: We have about 800 IEEE members in the Ventura County and we have a very active [IEEE Section](#) [this is the link to our website] with about 60 technical events planned for this year. The quality of our events supported by the great energy of our 55 volunteers attracts impressive speakers. IEEE is a global organization with more than 424,000 engineer members and is an organization that defined a lot of the technical standards used today in the technical world.

# Role Playing Exercise

*Steve, Nathalie, Reza, Pat, Gilles*

# The Care and Feeding of Speakers – long before the talk

- People like to be able to plan their calendars far in advance. Ask a potential speaker 3-18 months ahead of the planned date. Firm up the commitment quarterly, then monthly, then weekly.
- This feeds in to the creation of a speaker calendar, which can be shown to other potential speakers to demonstrate the caliber of the organization. See Fundraising, below!
- Obtain the talk title, description, and speaker biography, and provide to your web / publicity officer. Before publication, confirm with the speaker.

# The Care and Feeding of Speakers – days before the talk

- As time draws near, share the meeting logistics, directions, reimbursement policy, etc.
- Describe the typical meeting attendee make-up, so they can tune the talk appropriately.
- Invite the speaker to “networking time” (with dinner, if you offer it at meetings) prior to their presentation. They’re there to meet people, too.
- Ask the speaker if they have any specific logistic needs (projection, networking, video, etc.) or personal needs (travel accommodation, food, ...)
- Provide a cell phone number in case of emergency.

# The Care and Feeding of Speakers – at the talk

- When the speaker arrives, welcome them!
- Introduce the speaker to the other officers present, then to people attending the networking session.
- Make sure the speaker's materials are in order, and can be used with the equipment in the meeting room.
- Engage the speaker in conversation, extending the conversation to others who may contribute to the speaker's interests, or vice-versa.
- After the talk, an officer should wait for the speaker to depart. The speaker should never be the last person to leave the meeting room!
- See if the speaker needs directions before departing.

# The Care and Feeding of Speakers – after the talk

- Follow up with a thank-you e-mail (or better, a thank-you note in writing).
- Invite the speaker to submit an expense report for mileage. Most will decline.
- Invite the speaker to consider coming back in a few years to follow up on the topic.
- Ask the speaker for recommendations for how to make the experience more pleasant.
- Ask the speaker for recommendations for other speakers on this or related topics.
- If the speaker is a company owner or officer, ask if the company would be interested in becoming a sponsor.

# Tonight's Topics

- How We Tie In to the Broader IEEE
- Section Summary
- The Section Web
- Best Practices
- **Volunteers – Steve Johnson**
- Fundraising
- Logistics
  
- For Further Information

# Volunteers

- How to match a volunteer's interests with your needs
- How to assign tasks to different officers
- Finding your successor



# Volunteers make the IEEE work!

- First of all, thank you for volunteering!
- Volunteer leadership is vital to the success of the IEEE.
- Our volunteers help in the:
  - organization, planning and production of all our Section and Chapter activities
  - organization, planning, and running of conferences, technical interest groups, and standards development
  - contribution of content to periodicals and publications

# Matching volunteer's interests with your needs

- Happy and productive volunteers feel that they are contributing positively to something larger than themselves, and contributing a recognizable benefit to themselves, to the organization, and to society as a whole.
- Get to know your volunteers – let them tell you what they want and need.
- Revisit people's assignments periodically to prevent burn-out and to fulfill changing needs.

# Assigning Tasks to Different Officers

- Vision – develop the objectives of the chapter in concert with the goals of the Section, Region, and global IEEE
- Transparency – with the officer volunteers, guide the creation of task lists from the mission and objectives.
- Solicit volunteers for specific tasks. Spread the wealth!
- Seek out additional volunteers for unmet needs.
- Revisit over time to verify that things are working, and to avoid burnout.

# Find Your Successor

- Recognize that your own needs will change over time. Avoid your own burnout!
- Give yourself and others the chance to develop professionally by planning your own succession. Sketch out a transition timeline.
- Watch for fellow officer volunteers who express curiosity, enthusiasm, or at least tolerance 😊 for what you're doing.
- Engage in informal conversations about the role, duties, the learning benefits, etc. – this is the first step in your transition plan.
- Transition a few responsibilities at a time.
- Go find your own next volunteer position!

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# Fundraising

- Built-in sources of funding
- Low-hanging fruit
- How to find prospects, and how to present our story
- Linked to a strong mission statement

# Built-In Sources of Funding

## *Money for Free, almost*

- The IEEE provides a small amount of money each year to all “live” chapters, and a somewhat larger amount to “active” chapters.
- An “active” chapter runs more than two meetings a year. Submitting L31s for each of your meetings is the only way to register such activity.

# Low Hanging Fruit

- Section money, from a number of sources
- Co-sponsorship, often from LMAG
- Corporate matching gift programs
- Corporate volunteer effort funding programs (see [Dollars for Doers list](#) on Section web site)
- Technical Society money, matching grants, etc.



# Asking For Contributions

## *Prerequisites*

- Have a coherent story
  - Who we are, what we're doing, what we need
- Have a way to communicate your story
  - 15-second elevator speech
  - Web site
- Have a way to celebrate sponsors
  - Announce prior to meetings; show on web site or hand-outs; etc.

# Asking for Contributions (cont'd)

## *Who to ask:*

- Previous sponsors
- Your speakers or their employers
- People or companies that see your audience as potential customers, suppliers, or employees
- Your volunteers' / members' employers

# Asking for Contributions (cont'd)

## *How to Ask:*

- Briefly describe the chapter's / section's mission at the start of technical meetings or mixers.
- Introduce yourself to people who hang around after the presentation or meeting and ask good questions. They're already engaged in what you're doing. Ask them if they'd like to be a sponsor.
- If your speaker is a company officer, a recruiter, etc., just ask if they'd like to be a sponsor.

# Logistics

- **vTools** – volunteer-developed tools to support IEEE activities
- **SAMIEEE** – volunteer access to member information
- **NetSuite** – tools for financial reporting

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# vTools

## *Volunteer Tools for Member Activities*

- Create a WebInABox site
- Report officer changes
- Schedule a Meeting
- Section Vitality Dashboard
- Setup a Survey
- Setup a Web Conference
- Setup an election
- Submit an eNotice
- Submit L31 report (see Fundraising)
- Vote in an election

# SAMIEEE

- SAMIEEE is a Web-based ad hoc query tool that provides volunteers access to member data.
- It allows ad hoc querying, reporting, and downloading of IEEE's membership data to authorized or designated IEEE volunteers.
- “Canned” queries include a Section Vitality Dashboard, annual IEEE statistics, and year-over-year regional comparisons.
- Queries can be accessed through visualizations or data downloads to Excel.

# NetSuite

## *Tools for Financial Reporting*

- Keeping the books the IEEE way 😊
- Easy-to-use tools for Section and large chapter treasurers
  - Writing checks
  - Logging contributions
  - Producing balance sheets
  - Providing supporting documentation for the IEEE's annual financial review process



# For Further Information

- [Setting Up and Running a Chapter](#) (2015) – by Nathalie Gosset and Steve Johnson
- [IEEE Chapter Chair's Reference Guide](#) (2005) – out of date, but contains some good suggestions for finding speakers, topics, etc.
- [IEEE Society Chapter Funding Guide](#) (2015) – links to the funding information for each of the IEEE Technical Societies
- [SAMIEEE](#) – volunteer access to member information
- [Vtools](#) – volunteer-developed tools
- [NetSuite](#) – tools for financial reporting