Section development and vitality: How to Organize a Metro Area Workshop

IEEE SMART TECH
METRO AREA WORKSHOP SERIES
Professional workshops in a learning environment

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WHY ATTEND an
IEEE SMART TECH
METRO AREA WORKSHOP?

Webinar Objectives

- What is a Metro Area Workshop ?
- What are its Benefits ?
- What will it take to host a Metro Area Workshop in my Section or Region?
- How do we start ?

- What is a Metro Area Workshop ?
  - Origins, Theme, Demographics, Testimonials.
- Benefits of Hosting a Metro Area Workshop.
- Workshop Roles
- Workshop Format, Example & 2011-2013 Results.
- 10 Steps To A Successful Workshop
- MAW Brand Requirements
- Workshop Financial Responsibility
- France Metro Area Workshop
- Signup Process

Origins of Metro Area Workshops

Metro Area Workshops started as activities funded as part of a project known as the Region 1-6 Strategy. Now it will expand to our Region too

Objectives

1. Engage existing IEEE members in our Region

2. Demonstrate the value of IEEE membership to members/non-members

3. Enhance recruitment and retention of IEEE members in our Region

4. Increase IEEE membership overall

Metro Area Workshop Theme

- The goal of Smart Tech Metro Workshops is to increase member engagement and provide value to IEEE members and their local community by providing career assistance, professional networking and education on technology changes.

- Workshop content shall address emerging technologies that are in demand within your local area (Example topics include, but are not limited to, Cloud Computing, Smart Grid, Software Engineering, Mobile Application Development and Electric Vehicle Technology).
  - Workshop target audience is practicing engineers and technical professionals who are innovators, have a desire to learn more, and/or are in career transition or considering a career change.

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Attendee Demographics

- Approx. 80% of attendees were IEEE members / 20% were not IEEE members.
- Approx. 60% of attendees were self paid registrants / 40% had their registration paid by their employer.
- Primary reasons for attending MAW are below.

Survey Question …..Reason for attending MAW	Count of Responses Chosen	% of Responses who chose
To gain new technical knowledge	321	80%
For professional development	301	75%
To network with other technology professionals	247	62%
To get more marketable skills	86	23%
To earn Continuing Education Units (CEUs)	40	21%
Other (please specify)	27	7%

2011-2013 Metro Area Workshop Testimonials

- "Best thing I've ever gotten out of IEEE!"

- "The topics were quite well chosen... It is all of the stuff that I see on job descriptions."

- "Best IEEE Meeting I have ever attended. The organization and participation from local volunteers was outstanding !!!"

- "Great, affordable seminar. I will likely attend future events. A+++ ."

- "The workshop was a rewarding opportunity to stay current, as a semi-retired R&D manager of EEs, computer scientists, and human factors engineers."

- "Excellent concept - looking forward to the next one."

"What Is In It For Me ?"– Metro Area Workshops

- New Members.
- Non-members eligible for IEEE membership discount.
- 53% New Member Conversion Rate.
- Volunteer Team Building.
- New Networking Opportunities.
- Exposure to other emerging technology areas offered by IEEE.
- Opportunity to engage with local community.
- Proven successful format.
- Marketing Outreach; which includes a section specific website and collateral.
- Management of Online Registration.
- Catalog of Content and speakers used at prior MAW's.

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Metro Area Workshop Critical Roles

*Detailed Descriptions of each role can be found in the appendix

Metropolitan Area Workshop Format

❑ 1 or 2 day multi-day, multi-track events focused on the practicing engineer.

  ▪ Professional training

  ▪ Career Assistance for tech professionals transitioning to new emerging markets

  ▪ Continuing Education Units available

❑ Value Priced – Reasonable average attendee price to encourage participation

❑ Events hosted by 1 or more Sections and Chapters.

❑ Potential technical content sources: Communications Society, Computer Society, Power & Energy Society <u>and</u> Local Sections

❑ Local Keynotes/ Plenary Speakers.

❑ Plenty of Networking Time.

Example – 2013 Seattle Workshop

Activity	Times	Times Amount	Friday - Nov. 1			Saturday - Nov. 2		
Registration & Continental Breakfast	7:00-7:45 am	45 Minutes	NORTHWEST BALLROOM			NORTHWEST BALLROOM		
Opening Session	7:45-8:00 am	15 Minutes	Joe Decuir MAW Chair - - Northwest Ballroom			Region Director - Mike Andrews - - Northwest Ballroom		
TRACKS			PES	Life Science	Comp Engineering	Smart Grid	Comp Engineering	Career
Rooms			BALLROOM 2	BALLROOM 3	BALLROOM 1	BALLROOM 1	BALLROOM 2	BALLROOM 3
Track Sessions	8:00-9:30 am	1.5 Hour	1-Dist. & Transmission Lines	Chuck Parker 9-Dynamics of human movement: An introduction to OpenSim, an open-source software platform for	6-Computer Security	2-Intro to Smart Grid	7-Embedded Systems	10-Setting a Course for Career Satisfaction
**Break	9:30-10:00 am	30 Minutes						
Track Session Continued	10:00 - 11:45 am	1.75 Hours						
Networking Lunch	11:45am - 12:30 pm	45 Minutes	NORTHWEST BALLROOM			NORTHWEST BALLROOM		
Lunch Keynote	12:30-1:15 pm	45 Minutes	Dr.Blake Hannaford - Northwest Ballroom			Mohamed El Sharkawi - Northwest Ballroom		
TRACKS			PES	Aerospace	Comp Engineering	Smart Grid	Comp Engineering	Wireless
Rooms			BALLROOM 2	BALLROOM 3	BALLROOM 1	BALLROOM 1	BALLROOM 3	BALLROOM 2
Track Sessions	1:15-2:45 pm	1.5 Hours	1-Dist. & Transmission Lines	5a-Future Trends in Avionics and the impact on Flight Operations	8-The Cloud	2-Intro to Smart Grid	4-Electric Vehicles	3-Modern Wireless Systems & Networks: An Overview
**Break	2:45-3:15pm	30 Minutes		5b-Lightning and Lightning effects on Composite Aircraft				3A-Short Range Wireless Connectivity
Track Session Continue	3:15-5:00pm	1.75 Hours						
Plenary - Keynote	5:30-6:15pm	45 Minutes	Paul Gartz - Keynote - Northwest Ballroom					
* ** Reception	6:15-7:30pm	1 Hour 15 Minutes	Reception - MAXI's - 14th Floor			Workshop Ends		

- $169 Regular Price IEEE Members
- $219 Regular Price Non-Members

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Seattle MAW P/L & Results

Profit - Loss Summary - Seattle MAW

Profit - Loss Summary

	Actual
Total Expenses	$71,062.57
Total Income	$21,565.00

Total Profit (or Loss)	**($49,497.57)**

MAW Funding	Actual
Total MAW Funding	$ 59,500
MAW Budget	$ 31,750
Marketing	$ 21,250
Admin & Travel	$ 3,750
USA MAW	$ 2,750

Budget Variance	Actual
Total MAW Funding	$ 59,500
Total Profit (or Loss)	$ (49,498)
Budget Variance	$ 10,002

Costs Based on 2 Day Event

Pie chart:
- Speakers; $13.807 ; 19%
- Marketing ; $13.069 ; 18%
- T & E Expense Totals, $4,713 , 7%
- Venue ; $38.160 ; 54%
- Reg. Fees & Misc. Totals; $1.312 ; 2%
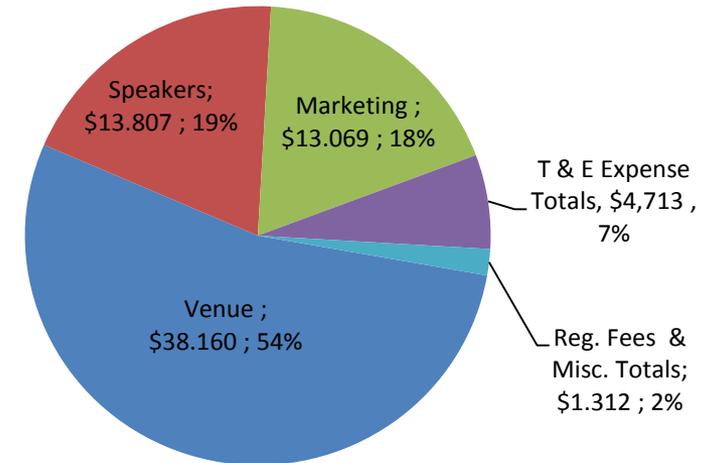
- 172 Total Registered
- Event Yielded 22 New Members.
- 88% Attendee Satisfaction

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2011-2013 Metro Area Workshop Results

Section	Total Registered	Paid	# New Members	*Top Box Satisfaction	**Overall Satisfaction
Austin	157	137	*33	42%	79%
Huntsville	119	103	12	35%	80%
Detroit	144	113	18	42%	87%
Santa Clara	270	219	28	47%	90%
White Plains	144	115	20	48%	93%
Baltimore	241	208	35	48%	85%
Boston	195	145	20	46%	81%
Atlanta	137	102	21	46%	88%
Seattle	172	135	22	37%	88%
Twin Cities	154	117	16	40%	86%
Average	**174**	**140**	**23**	**43%**	**86%**

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10 Steps To a Successful Metro Area Workshop

Major Steps / Deliverables	Responsible
1-Select Volunteer Workshop Team	Section
2-Determine Budget & Pricing	Section
3-Determine Venue / Date	Section
4-Select Content /Finalize program	Section
5-Launch Website, Marketing & Online Registration	MGA
5-Local Marketing	Section
6-Seek Sponsors	Section
7-Finalize Logistics	Section
8-Execute Event	Section
9-Issue Survey /Process CEU's	MGA
10-Close	MGA

MAW Brand Requirements

- Target Audience is practitioners.

- Not to be part of another conference.

- Multi Track Format, includes 30 minute Network breaks and reception. IEEE oriented General Session.

- Workshop Format Content: Only 1/2 day or Full day presentations - 2 speakers max per course, Primer level, Interactive, MAW Branded Slides. Contains Key Takeaways, employment trends, and "further learning". Slides subject to prior review, slides either printed and/or posted in event drop box.

- Select topics and speakers that support the MAW Objective of content for practitioners.

- Experienced/expert level presenters – distinguished lecturer level, Doctor or respected in field.

- In order to facilitate MAW Marketing, use IEEE MAW Website and the online registration tool – must meet firm deadline for Speaker Bio and Course description submission on all content. Also must use MAW templates when required.

- Each content track is monitored and facilitated by an IEEE volunteer at the event.

- Use of MAW Brand Signage and other Marketing materials at the event to Brand the event.

Metro Area Workshop Financial Responsibilities.

1. Financial responsibility of the workshop belongs to the hosting section or sections*.

   Specific Areas of Responsibility
   - Venue, F&B, AV & Wireless Costs
   - Speaker Travel Expense & Fees

2. Marketing Expenses incurred by MGA for the event will be the responsibility of MGA.

   Specific Areas of Responsibility
   - Email campaign, Pull up Screens, Shipping and Printing of Posters, Schedules, Learning Journals and Coupons.
   - MAW Coordinator Role

* Pilot Workshops were subsidized via the Region 1-6 Strategy Project and a few local sponsors.

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MAW in Region 8 France

- France!!
- To be held in Paris (Issy les Moulineaux) on December 5th 2014
- Subject: **Distributed Data Streaming**
- Professional oriented workshop
  - One day event
  - Lectures in the morning (1 lectures 2 industrial cases)

France MAW

- Parallel Workshops in the afternoon (ESPER and Storm)

- Organizing Committee :
  Co Chairs: A.Amara and Raja Chiky
  Local Arangement Chair S. Lefebvre, Ori Pekelman

- Honorary Chair: Costas Stasopoulos

- Expected attendance:100 people

France MAW

- Raja Chiky -> lecture on data streaming (1h30)
- EDF (45 minutes) Georges Hebrail, Marie-Luce Picard
- ORANGE (45 minutes) Fabrice Clerot
- IEEE Sponsorship: France section
- Registration:
  - Morning only: 80 euros
  - Morning + afternoon (including lunch)= 150 euros

Next Steps: How to "Sign-up"

1. Contact Advisory Team

   1. Richard Herczeg (IEEE Staff) r.herczeg@ieee.org
   2. Karen Pedersen (Region 4 Director) kspedersen@ieee.org
   3. Timothy Kurzweg (Region 2 Director-Elect)
      kurzweg@ieee.org
   4. Costas Stasopoulos (Region 8 Director-Elect)
      costas@ieee.org

2. Get Approval from your ExCom.
3. Need further help in organizing your Metro Area Workshop? Let the Advisory Team know of specific areas of need.
4. MAW Coordinator will then follow with targeted webinars in those areas available to all organizers.

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Questions ?

Appendix

Advisory Committee Role

Committee consists of 2-3 Region Director/Director-elects and MGA MAW Coordinator.

- To assist the local MAW Organizers with advisory support and guidance regarding content, budget and organizational considerations.
- Oversight of status on key Section deliverables, (i.e. Venue, Date, General Session etc.)
- Available to attend each Local MAW Kick-off Meeting.
- Available to attend Project Review – 1 month prior to launch of marketing materials.*
- Respond to "Advisory Committee Messages" in timely fashion – 48 hours.
- Responsible for continuous improvement of future MAW's.

* See venue contract – Must also be timed to occur prior to any cancellation penalties.

Metro Area Workshop Chair Role

An event experienced senior section member, potentially a past section officer who has credibility, is proactive, enjoys managing events and has wide network. Ideally has no other current conference or event responsibility.

- Aligned with MAW Value Proposition.
- Responsible for success of the workshop.
- Has authority to solve problems, make decisions and negotiate with external parties.
- Understands level of detail that is required and cross checks with Advisory Team when needed.
- Updates MAW Coordinator of any roadblocks and issues.
- Builds/Fills all MAW Event Team Roles.
- Leads Section MAW Meetings. Creates Action Plans.
- Follows MAW Quality Plan
- Approx. Time Required: 1-3 hours a week for period of 6 months.

MAW Coordinator Role

MGA Staff member. ½ FTE.

- MGA MAW Project Manager
  - Supports the Advisory Committee.
  - Post weekly standard MAW report to Advisory Team on metrics measuring event progress, risks, marketing and financials.
  - Ensure completion of assigned deliverables outlined in the Project Plan.
  - Responsible for designing and updating all elements in the Metro Area Workshop Volunteer Handbook. Manages overall MGA MAW Budget
  - Respond to "MAW Coordinator Messages" in timely fashion – 24 hours. Update Advisory Team on all troubleshooting actions and roadblocks. Based on those actions create FAQ list—reference available to Local MAW volunteers.
- Responsible for capturing lessons learned and continuous improvement of future MAW's.
- On Demand Coaching / Mentoring – available to participate in Local MAW Kick-off Meeting & Project Review Meeting.
- Responsible for compilation and analysis of metrics/results for all MAW events conducted.

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Region 8 Membership

- Region 8 is currently the second largest IEEE region. At the end of July 2014 the Region had 70,687 total members:
  - The Region has 50,239 Higher Grade Members, 11,755 Graduate Student Members and 8,693 Student Members.
- Membership in the Region has increase by 0.2% from July 2013, representing a gain of 151 members.
- Member grade membership is up by 1.8% from July 2013, representing a loss of 907.
- Graduate Student Membership is down by 4.9% from July 2013, representing a gain of 609 members.
- Student membership is down by 1.7% from January 2013, representing a gain of 147 members.
- We are the only Region in IEEE that has an increase. We must be doing something right.

The rebate situation in 2014

- 12(18) Sections out of 56 had not received rebate for 2013 21% (32%). Was reduced to 5(10) after corrective actions 9%(17%).
- We are glad that the efforts we made last year paid off this year!