





# **New Volunteer Orientation**

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for Humanity

#### Outline

- **1.** Introduction of participants
- 2. Short Overview of IEEE
- **3.** Short Overview of Region 8
- 4. Running a Section successfully
- 5. Section OU Analytics
- 6. Overview of Member and Geographic Activities Board
- 7. Region 8 Committee meetings
- 8. Basics of finances and expense reporting
- 9. Concluding Remarks and Q&A



# **Volunteer Orientation**

**1.** Introduction of participants



#### **Antonio Luque**

- Living in Seville, Spain
- Associate Professor, University of Seville, Spain.
- IEEE volunteer since 2001 at the Section, Region, Society, Technical Activities Board, Member and Geographic Activities Board, conferences and publications.
- R8 Director 2021-2022.



#### Your turn!

- I am from...
- My professional position...
- My IEEE position...



## **Volunteer Orientation**

**2.** Short overview of IEEE



#### What is IEEE?

IEEE is the world's largest technical professional organization dedicated to **advancing technology** for the **benefit of humanity**.



#### What is IEEE?

- IEEE and its members **inspire** a **global community** through IEEE's highly cited **publications**, **conferences**, technology **standards**, and **professional and educational activities**.
- Key values are technical innovation, access to cutting-edge information, networking opportunities, and exclusive member benefits.



#### **IEEE Mission & Vision**

- Mission statement: IEEE's core purpose is to foster technological innovation and excellence for the benefit of humanity.
- Vision statement: 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.



#### What is IEEE?

- Members support the mission to advance technology for humanity and the profession.
- Members introduce technology careers to students.
- Members build technical communities (Societies & Chapters).
- Members network with each other maybe using tools like IEEE Collabratec<sup>™</sup> or others.



#### **Benefits of membership**

- Trusted voice.
- Global community.
- Profession:
  - Keeping technically current,
  - Career resources and recognition,
  - Professional networking,
  - Continuing education.
- Member discounts.



#### **Benefits of membership**

- IEEE membership benefits include:
  - IEEE Spectrum magazine subscription,
  - Collabratec member exclusive access,
  - IEEE Xplore Digital Library discounts,
  - IEEE Mentoring Connection,
  - Networking professional & personal
  - Conferences.



#### **Useful links**

- IEEE Membership. <u>link</u>.
- Geographic Units FAQ's <a href="https://supportcenter.ieee.org">https://supportcenter.ieee.org</a> .
- OU Analytics: Web-based ad hoc query tool that provides volunteers access to member data. Allows querying, reporting, and downloading of membership data to authorized or designated volunteers. link.
- eNotice: Electronic service developed for organizational units to facilitate email distribution of newsletters, meeting notices and conference materials.

https://enotice.vtools.ieee.org.



### **IEEE quick facts (1)**

- More than 427,000 members in 190 countries; 36% live in the United States (R1-R6), 64% in R7-R10.
- More than 145,000 student members.
- ▶ **344 Sections** in 10 geographic Regions worldwide.
- > 2,702 Chapters unite local members with similar technical interests.
- ▶ 3,700 Student Branches at colleges and universities in 100 countries.
- **3,625 Student Branch Chapters** of IEEE Technical Societies.



## **IEEE quick facts (2)**

- 634 Affinity Groups, non-technical sub-units: Young Professionals (YP), Women in Engineering (WIE), Life Members (LM), IEEE-USA Consultants' Network.
- **39 Societies** and **7 technical Councils** representing the wide range of IEEE technical interests.
- More than 5 million documents in IEEE Xplore Digital Library,
  - more than **15 million downloads** each month.
- 1,032 active standards and more than 1000 projects under development.



## **IEEE quick facts (3)**

- More than 200 transactions, journals and magazines (1/3 of the world's technical literature in electrical engineering, computer science and electronics):
  - 17 of the 20 top-cited publications in electrical and electronics engineering,
  - 75% of the authors are from outside USA.
- More than **2,000 conferences** in 106 countries:
  - partnering with 1,300 non-IEEE entities globally,
  - attracting more than **485,000 conference attendees**,
  - publishing over **200,000 new conference papers** annually

Data current as of Dec. 2022, taken from <u>www.ieee.org/about</u>



- **Student**: At least 50% of a normal full-time academic program as a registered undergraduate or graduate student in a regular course of study in IEEE-designated fields.
- **Graduate student**: At least 50% of a normal full-time academic program as a registered graduate student in a regular course of study in IEEE-designated fields.
- The total cumulative period for a member to hold the Student member grade and/or the Graduate Student member grade is limited to eight years.
- Student members or Graduate Student members, upon graduation or upon reaching the total cumulative eight-year limit as a Graduate Student member (whichever occurs first), will be transferred automatically to member grade.

- Associate: Technical and non-technical individuals who do not meet the qualifications for member grade but who wish to benefit from membership and partnership in IEEE, and for those who are progressing, through continuing education and work experience, toward qualifications for member grade.
- Student members outside of the IEEE-designated fields, upon graduation or upon reaching the eight-year limit (whichever occurs first), will be transferred to Associate member grade.



- Member: Those who have satisfied IEEE-specified educational requirements and/or who have demonstrated professional competence in IEEE-designated fields of interest. For admission or transfer to the grade of member, a candidate may be either:
  - An individual who has received a three- to five-year university-level or higher degree from an accredited institution or program and in an IEEE-designated field,
  - An individual who has received a three- to five-year university-level or higher degree from an accredited institution or program and who has at least three years of professional work experience engaged in teaching, creating, developing, practicing, or managing in IEEE-designated field,
  - An individual who, through at least six years of professional work experience, has demonstrated competence in teaching, creating, developing, practicing, or managing within IEEE-designated fields.



- Senior Member: Highest grade for which application may be made. Requires experience reflecting professional maturity. A candidate shall be an engineer, scientist, educator, technical executive, or originator in IEEE-designated fields and shall have been in professional practice for at least ten years and shown significant performance over a period of at least five of those years, such performance including one or more of the following:
  - Substantial responsibility or achievement in IEEE-designated fields,
  - Publication of papers, books, or inventions in IEEE-designated fields,
  - Technical direction or management of important work with evidence of accomplishment in IEEE-designated fields,
  - Recognized contributions to the welfare of the professions encompassed by IEEE-designated fields,
  - Development or furtherance of important courses in one or more of the IEEE-designated fields at an institution in the REP list,
  - Contributions equivalent to those of the above areas related to IEEE-designated fields, provided these contributions serve to advance progress substantially in IEEE designated fieldson ?

- **Fellow**: Recognizes unusual distinction in the profession and is conferred only by invitation of the Board of Directors upon a person with an extraordinary record of accomplishments in any of IEEE's designated fields of interest.
  - The candidate shall hold Senior member grade at the time the nomination is submitted.
  - Normally, the candidate shall have been a member in any grade for a period of five years or more preceding 1 January of the year of election; however, the five-year membership requirement may be waived for a Fellow candidate who has been engaged in professional practice (as needed to qualify for Senior member grade) in a geographical area where, in the judgment of the Board of Directors, it was difficult to become a member previously, as evidenced by the absence of a Section previously and the recent formation of a new Section to cover that geographical area. In such case, membership of five years or more in a recognized local electrical, electronics, or computer-engineering society may substitute for the five-year IEEE membership requirement, when the nomination is submitted within four years after the formation of the new Section.



#### **Other categories**

- Life member: Member who has reached the age of 65 years and who has been a member of IEEE (or one of its predecessor societies) for such a period that the sum of his/her age and his/her years of membership equals or exceeds 100 years.
  - Basic dues and assessments are waived for those achieving Life Member status.
- Young Professionals: Post-Student members who are within 15 years of receiving their first professional degree with an option to participate beyond the 15-year time span.
- **Society Affiliate**: Member of an IEEE Society who are not IEEE members and are not entitled to any IEEE benefits or services that are reserved solely for IEEE members.
  - All affiliate benefits and services come directly from the individual IEEE Society offering affiliation.
  - For each Society one is affiliated with, the applicant pays a separate annual affiliate fee plus that IEEE Society's annual membership dues.
  - Not all Societies offer affiliation.



#### **IEEE organization**

- Grouped into geographic areas reflecting where members live and work ...
  - **10** Geographic Regions,
  - 344 Sections within Regions,
  - **3,700** Student Branches at colleges and universities over 100 countries.
- ... and technical areas based on members technical fields of interest (Knowledge Communities, both global and local):
  - **39** Technical Societies, **7** Technical Councils, and **12** general technical communities,
  - 2,702 Chapters that unite local members with similar technical interests,
  - 3,625 Student Branch chapters of Technical Societies.

http://www.ieee.org/about/today



#### **IEEE organization**

- Members may also group up attending to non-technical interests or affinities.
- The following have been approved as parent organizational units of local affinity groups:
  - <u>Consultants Network</u>, CN,
  - Life Members, LM,
  - Women in Engineering , WIE,
  - <u>Young Professionals</u>, YP (formerly GOLD).
  - With a total of 634 affinity groups worldwide which are non-technical subunits of one or more Sections or Regional Councils.

#### • Other groups are:

- IEEE Entrepreneurship ( <u>http://entrepreneurship.ieee.org/</u> ),
- Special Interest Group on Humanitarian Technology ( <u>https://www.ieee.org/special\_interest\_group\_on\_humanitarian\_technology.html</u>) and other groups focusing on humanitarian efforts,
- And several virtual communities.







#### **IEEE Divisions**

**39 Societies** and **7 Technical Councils** grouped in **10 Divisions** (same number as for Regions):

- I. Circuits and Devices (CAS, ED, SSC; CEDA, Nano)
- II. Industrial Applications (CPMT, DEI, IA, IM, PEL, UFFC)
- III. Communications Technology (Com)
- IV. Electromagnetics and Radiation (AP, BT, CE, EMC, Mag, MTT, NPS; CRFID, CSC)
- V. Computer (c)
- VI. Engineering and Human Society (E, IE, PSE, PC, R, SIT, TEM)
- VII. Energy and Power Engineering (PE)
- VIII. Computer (c)

<sup>26</sup>X

IX. Signals and Applications (AES, GRS, IT, ITS, OE, SP, VT)

Systems and Control (CIS, CS, EMB, Pho, RA, SMC; Bio, Sen, Sys)

#### **IEEE organization**

- Brings together members with similar interests.
- Sponsors
  - Conferences,
  - Workshops,
  - Tutorials,
  - Seminars,
  - And so on.
- Develops publications:
  - Journals,
  - Magazines,
  - Newsletters.
- Recognizes member accomplishments.
- ► Helps members to network through Societies, Chapters, Conferences, and other tools, e.g., IEEE Collabratec<sup>™</sup> <u>collabratec</u>



#### **IEEE Section – the basic GeoUnit**

- Sections provide a local community of colleagues.
- Members build a network through activity in
  - Sections,
  - Chapters within the Section,
  - Student Branches within the Section.
- Volunteers develop new skills and experience:
  - Management,
  - Teamwork,
  - Leadership.
- Volunteers:
  - Gain recognition,
  - Recognize achievements of others.





#### **IEEE Organization**

- IEEE Officers
  - Voting members of IEEE elects a **President** each year.
  - Serves for three years:
    - President-Elect,
    - President and CEO,
    - Past-President.
- President also serve on IEEE governing bodies:
  - IEEE Board of Directors (31 voting members: 3 "Presidents" + 6 Vice Presidents + Secretary + Treasurer + 10 Regional Directors + 10 Division Directors),
  - IEEE Assembly (23 voting members: 3 P + 10 RD + 10 DD).



#### **IEEE Organization**

- ► IEEE Major Boards have elected volunteer leadership.
- Six subordinate boards govern major areas of IEEE interest:
  - Member and Geographic Activities (MGAB),
  - Technical Activities (TAB),
  - Educational Activities (EAB),
  - Publication Services and Products Board (PSPB),
  - Standards,
  - IEEE-USA.
- There are a number of Committees that report either to BoD or to the Boards.
- IEEE is governed by volunteers for volunteers, with the help of a reduced number of qualified staff members.

#### Summary of the IEEE Organization



# **Volunteer Orientation**

3. Short overview of Region 8



#### Region 8 covers Europe, Middle East, and Africa



- Largest Region in terms of geographical extension.
- Probably in diversity is also the largest one.

#### Percent of total IEEE Membership by Region



• R8 is Second largest in terms of number of members.

#### **R8 Organizational Units data**

- 59 Sections
- 11 Subsections
- 1 Council: Africa Council
- 607+ Society Chapters
- 101+ Affinity Groups
- 664+ Student Branches
- 389+ Student Branch Chapters
- 101+ Student Branch Affinity Groups

As of Feb 2020




# 'Average' Region 8 Section

1,100 Members

(largest ca. 9,500) (median ca. 500) (smallest ca. 50)

- 18 OU's (with ca. 40 member
  - 9 Chapters,
  - 1 Affinity Group,
  - 6 Student Branches,
  - 1 Student Branch Chapter,
  - 1 Student Branch Affinity group.





# **IEEE Region 8 Vision and Mission**

#### Mission

To serve the needs of the members of the Institute, the profession and society at large, by enhancing and supporting the IEEE's Organizational Units and their activities within Region 8.

#### Vision

Region 8 is an effectively organized, dynamic and influential entity, recognized as a leading and esteemed part of a truly transnational IEEE, with IEEE benefits equally available to all members.



# Key steps to realize the mission

- Provide a platform for coordination, motivation and interaction among Region 8 units.
- Provide a link between the Region and other IEEE organizational units.
- Work to achieve smooth and effective operations in different countries
  - recognizing cultural differences, and
  - effectively cooperating with national societies and other organizations.
- Expand IEEE presence and activities to new geographic areas in Region 8.
- Promote the transnational nature of IEEE within the Region and the Institute.

#### **R8 Operating Committee (OpCom)**



Vincenzo Piuri



Adam Jastrzebski



Antonio Luque



Vinko Lesic



Mike Hinchey



Marios Antoniou



Ljupco Karadzinov





#### **Committee members**

#### • OpCom

- **Director:** Vincenzo Piuri (italy)
- Director-Elect: Mike Hinchey (UK and Ireland)
- Past-Director: Antonio Luque (Spain)
- Secretary: Ljupco Karadzinov (North Macedonia)
- Treasurer: Adam Jastrzebski (UK and Ireland)
- Vice-Chair, Member Activities: Vinko Lesic (Croatia)
- Vice-Chair, Student Activities: Abdulateef Aliyu (Nigeria)
- Vice-Chair, Technical Activities: Marios Antoniou (Cyprus)



#### **Committee members**

• All Section Chairs:

http://www.ieeer8.org/category/sections/

- Interface to members.



#### **Appointed members**

- Action for Industry: Toni Mattila (Finland)
- Awards & Recognition: Antonio Luque (Spain)
- Chapters: Anna Litvinenko (Latvia)
- Conferences: Tiziana Tambosso (Italy)
- Diversity, Equity and Inclusion: Gheith Abandah (Jordan)
- Entrepreneurship: Rawane El-jamal (Lebanon)
- Finance: Adam Jastrzebski (UK & Ireland)
- History Activities: Martin Bastiaans (Benelux)
- Humanitarian Activities: Theodoros Panagiotis Chatzinikolaou (Greece)
- Life Members: Peter Magyar (Germany)
- Membership Development: Mariya Antyufeyeva (Ukraine)
- Nominations and Appointments: Antonio Luque (Spain)
- Professional and Educational Activities: Andrejs Romanovs (Latvia)
- Publications and Communications: Adeel Sultan (United Arab Emirates)
- Strategic Planning: Antonio Luque (Spain)
- Student Representative: Maryam Saeed (UK & Ireland)
- Women in Engineering: Wafa Ben-Hmida (UK & Ireland)
- Young Professionals: Ines Inacio (Benelux)



# **Appointed AdHoc members**

- Alternate membership payments: Nadine Abbas (Lebanon)
- Careers New Initiative: Mohamed Amin (Egypt)
- Climate Change: Paul Cunningham (UK & Ireland)
- Continu>Ed: Vincenzo Kaabunga (Uganda)
- Cooperation with IEEE S/Cs and National Associations: Ilhem Kallel (Tunisia)
- Cross-section Technical Cooperation: Nadezhda Kunicina (Latvia)
- Educational Infrastructures: Albert Lysko (South Africa)
- Electronic Communications: George Michael (Cyprus)
- Electronic Communications Assistant: Maria Efthymiou (Cyprus)
- Engineering Projects in Community Service (EPICS): Samarth Deo (Sweden)
- Fellow Members Search: Maria Teresa Correia de Barros (Portugal)
- IEEE Milestones Awareness: Claire Lajoie-Mazenc (France)
- New Social Media: Kassiani Nikolopoulou (Greece)
- R8 Advisory: Vincenzo Piuri (Italy)
- Region 8 News: Maja Matijasevic (Croatia)

- Region 8 Today: Fatma Zamil (Jordan)
- Region Vitality Coordinator: Matej Zajc (Slovenia)
- SAC Contests, Awards and Recognitions: Vera
- Markovic (Serbia)
- SAC Training and Leadership Support: Khaldoun
- Taktak (Tunisia)
- SAC New Initiatives: Vildana Hrnjić
- (Bosnia and Herzegovina)
- Senior Members Search: Dusanka Boskovic
- (Bosnia & Herzegovina)
- Sections Congress Coordinator: Costas Stasopoulos (Cyprus)
- Social Media: Mohammad Hossein Babaee (Portugal)
- Standards Coordinator: Tuncer Baykas (Turkey)
- Subsections Strategic Development: Sanja
- Lazarova-Molnar (Denmark)
- Voluntary Contribution Fund: Andreas Koltes (Germany)
- Web: Nick WainWright (UK & Ireland)



44

#### **Africa Council**

- Africa has 11 Sections, 6 Sub-Sections and more than 6,000 active members across the continent's 54 countries as of 2016. Africa Council was approved in June 2018 and is now fully operational.
- Its primary responsibility is to be a centralized coordinating unit for IEEE activities in Africa. Other responsibilities are to provide:
  - Guidance to the members on how to use IEEE's tools, products and network to enhance the engineer in Africa.
  - A common voice for IEEE on the continent and provide an initial point of contact.
  - Volunteer development training to grow IEEE's presence in Africa to benefit all volunteers.
  - With the Africa Council, it is easier to identify solutions to problems in Africa. More importantly, African volunteers will get more opportunities to know themselves, network and share ideas and best practices for professional development.

#### What does R8 Committee do?

- Conducts **two annual meetings** with the Region's leadership:
  - coordination of Region 8 business,
  - ultimate decision body for matters under Region responsibility
  - training for new volunteers.
- Supports activities of local Organizational Units.
- Coordinates meetings for technical and professional purposes in the Region.
- Coordinates student, Young Professionals and Women in Engineering events.
- Coordinates activities between R8 entities and Organizational Units from outside the Region.
- Engages in member development.
- ▶ Web site: <u>www.ieeer8.org</u> .



# **R8 Conferences**

- Eurocon
- Melecon
- Africon
- Energycon
- Histelcon
- Approximately 300 IEEE conferences in Region 8 every year:
  - Some of them







#### **IEEE Conferences in R8 (partial view)**





#### IEEE Conferences in R8 (partial view)





#### **Recent and Future R8 Conferences**

- EUROCON 2023, July 2023, Torino, Italy
- ENERGYCON 2022, May 2022, Riga, Latvia
- MELECON 2022, June 2022, Palermo, Italy
- AFRICON 2023, September, Nairobi, Kenya
- IHTC 2023, September, Santa Marta, Colombia
- MELECON 2024, June, Porto, Portugal
- ENERGYCON 2024, March, Doha, Qatar
- RTSI 2024, September, Milan, Italy



# **Sponsoring Conferences**

- Sections can sponsor conferences. The Section is to sign a Memorandum of Understanding with the other parties.
- Record the decision to sponsor in the Section's meeting minutes. Review the application for sponsorship to make sure that the conference is a success and the quality is high.
- ► The Section should participate in the conference to gauge quality.
- ▶ If the Section needs advice, contact Region 8 Conference Coordinator.
- See



# New Technical Co-Sponsor (TCS) Fee

- For all conferences starting 1 January 2021 or later, in which an MGA Geographic Unit is a technical co-sponsor and there is no IEEE financial sponsorship, the MGA TCS Fee policy shall apply.
  - This fee is \$1500 per TCS conference, and \$22 per paper sent to IEEE Xplore.
  - If multiple IEEE Organizational Units (OUs) technically co-sponsor the same conference, the fee will be divided equally between all IEEE sponsors(i.e.: Society, Council, MGA Geographic Units).
  - MGA Geographic Units will have the option to bill the TCS fees directly to the Conference.





#### **Convening the Conference Community**

#### August 2022 Panama City, Panama



# **Volunteer Orientation**

4. Running a Section successfully



#### What a Section Chair does

Runs the Section.

Finds future leaders.

Be a role model.

Inspires and mobilizes people.

Organizes Administrative board meetings.

Supports other activities:

Professional,

Technical,

Non-technical (including social).

Reports new officers – important!

So they receive e-mail, info material, and so on.



# Why and how to report change of Officers and/or election results?

- > All officers shall be **elected annually** or **biannually**,
- > Term of office is 1 January to 31 December,
- An officer should not serve in the same position for more than four consecutive years, or for more than six years in total.

See MGA Operations Manual, Section 9.4.F: http://www.ieee.org/documents/mga\_operations\_manual.pdf



# Why and how to report change of Officers and/or election results?

- The Section/Chapter must report the change of Officers/volunteers as soon as possible.
  - > To ensure the IEEE Geographic Roster will be updated.
  - Ensure volunteers have access to IEEE MGA services:
    - SAMIEEE (web-based ad hoc query tool that provides volunteers access to member data, link),
    - vTools (wide range of tools developed by volunteers for IEEE members and IEEE volunteers: <u>http://sites.ieee.org/vtools/</u>),
    - Entity Web Hosting (service to develop, create and maintain websites on an IEEE host: <u>http://sites.ieee.org/</u>).
- IEEE Officer Confirmation Report: <u>http://officers.vtools.ieee.org/</u>
- > Meeting Reports:

https://events.vtools.ieee.org/tego\_/authentication/sign\_in?\_landing=/mee ting\_report/search



57

#### Positions/areas of responsibility in IEEE Geographic Roster for a Section

- Chair,
- Vice Chair,
- Secretary,
- Treasurer,
- Secretary/Treasurer,
- Industry Ambassador
- Nominations and Appointments,
- Newsletter,
- Professional Activities,
- Educational Activities,
- Student Activities...



#### Positions/areas of responsibility in IEEE Geographic Roster for a Section

- Historian,
- SAMIEEE,
- Awards and Recognition,
- Chapter Coordinator,
- Membership Development,
- Electronic Communications Coordinator,
- Chapters Chairs,
- Affinity Groups Chairs,
- Conference Coordinator.



#### From MGA Operations website.

First Quarter of the Year (January – March)

- Complete and submit all IEEE mandated documentation (e.g. Meeting Reports, Financials (NetSuite/ L50) to close the previous year.
- Report all Section Officers, Affinity Group, Chapter, and Student Branch Chairs.
- Update Section website.\*
- Does your Section have Social Media presence (Facebook, Instagram, etc)
- Train new officers through the Center for Leadership Excellence.
- Are you familiar with vTools?
- Promote use of Section Vitality Dashboard, vTools and SAMIEEE. \*
- Review /Update local operating procedures.
- Plan and budget for Section, Chapter, and Affinity Group activities for the year.
- Organize a workshop for Chapter and Affinity Group Chairs.
- Conduct joint meeting with student branches, e.g. technical presentation, Student Professional Activities Conference (S-PAC).
- Reach out to non-renewing members before the deactivation date (end of February)
- Review meeting reporting on vTools for all local units and bring it up to date



Second Quarter of the Year (April – June)

- Conduct a Membership Development activity (e.g. membership recruitment or elevation meeting). Half-year dues cycle starts in March. Contact deactivated members and ask them to renew.
- Conduct Professional Development Activities (e.g. workshop/seminar).
- Conduct a Continuing Education activity.
- Establish a plan for engaging with members in industry.
- Communicate with section members on IEEE activities (e.g. webinar).
- Engage with Regional Leadership and activities (e.g. attend annual regional meeting).
- Review Affinity Group and Chapter activities to ensure continuity.
- If there are no affinity groups or chapters in the Section, strive to form one using SAMIEEE to gauge members' interests.\*



Third Quarter of the Year (July – September)

- Promote a pre-university activity in your area (e.g. TISP, science fair judging).\*
- Conduct a Career Workshop (e.g. resume writing, employment network).\*
- Submit nominations for awards (e.g. MGA, TA, and Region). Solicit nominations for Section Awards.
- Establish partnership with industry (e.g. joint technical presentation/training).\*
- Conduct joint meeting with student branches (e.g. student training, STEP event).
- Support an affinity group function in conjunction with the section.
- Recruit new volunteers.\*
- Solicit nominations for leadership roles for the upcoming year and develop the slate for elections.



Fourth Quarter of the Year (October - December)

- Encourage members to renew
- Conduct an event to support involvement with local industry.\*
- Hold Officer Elections.
- Share and collaborate on humanitarian/community engagement projects.\*
- Conduct a Membership recruitment event (e.g. social event).
- Organize an Annual Dinner with Section Awards.
- Communicate with the Section membership and announce new officers
- Are elections held annually?
- Did you have an election in the last 2 years?

\*Activities marked with an asterisk should be conducted throughout the year.



# **Volunteer Orientation**

#### 5. OU Analytics



#### **OU Analytics** http://www.ieee.org/ouanalytics

IEEE.org | IEEE Xplore Digital Library | IEEE Standards | IEEE Spectrum | More Sites

0- Sign In

| IEEE Member and Geographic Activities |           |  |            |                       |                           |                      | <b>IEEE</b> |
|---------------------------------------|-----------|--|------------|-----------------------|---------------------------|----------------------|-------------|
| Search Volunteer Content              |           | Search   |            |                       |                           |                      |             |
|                                       |           |  |            |                       |                           |                      |             |
| Home News Awards                      |           | oard &<br>nmittees   | Operations | Volunteer<br>Training | Membership<br>Development | Contacts &<br>Roster | Resources   |
| / Home / Operations / Volunteer       | Tools / O | U Analytics  |            |                       |                           |                      |             |
| Operations                            |           | IEEE   | OU Analyt  | ics                   |                           |                      |             |
| Geographic Unit Resources             | >         | A visual business intelligence tool for volunteer access to member data                  |            |                       |                           |                      |             |
| Formations & Petitions                |           | << <u>Access IEEE OU Analytics</u> >>  |            |                       |                           |                      |             |
| Volunteer Tools                       | ~         | Use of IEEE OU Analytics must be in accordance with the IEEE Data Access and Use Policy. |            |                       |                           |                      |             |
| OU Analytics                          | ~         |  |            |                       |                           |                      |             |
| See Who Has Access                    |           | Important Announcements:   |            |                       |                           |                      |             |
|                                       |           | May 6, 2020:   |            |                       |                           |                      |             |
| IEEE Data Access and Use<br>Policy    |           | OU Analytics is now available.   |            |                       |                           |                      |             |
| Reference Materials                   |           | Traini   | ng         |                       |                           |                      |             |
| Questions & Answers                   |           | Click here to view the training materials  |            |                       |                           |                      |             |
| OU Analytics - User Groups            |           |  |            |                       |                           |                      |             |

#### **OU Analytics**

#### Memberships and statistics

- Numbers and details of members
- Subscriptions and membership
- Year Over Year Comparison (Geographic Membership Statistics Dashboard).

#### Volunteers

- Officer history
- All current officers (Geographic roster).





# Live demo



# **Volunteer Orientation**

6. Short overview of Member and Geographic Activities



#### **Member and Geographic Activities**

- IEEE Member and Geographic Activities (MGA) is focused on supporting and meeting the members' needs and IEEE membership recruitment and retention strategies and implementation. IEEE local geographic organizational units (Sections, Chapters, Affinity Groups, and Student Branches) provide unique opportunities for members to attend technical presentations, create strong peer-to-peer connections, and participate in leadership opportunities that can make a positive distinction in IEEE members' jobs and careers.
- The IEEE Member and Geographic Activities Board (MGA Board) is responsible to the IEEE Board of Directors, has oversight of IEEE geographic organizational units, and is responsible for IEEE membership and member development.



# Member and Geographic Activities

#### MGA mission

- Inspire, Enable, Empower and Engage Members of IEEE.
- For the purposes of:
  - Fulfilling the mission of IEEE,
  - Enhancing the members growth and development through their life cycle,
  - Providing a professional home.

#### **MGA vision**

• Ensure quality member opportunities for continuous engagement.



# **Member and Geographic Activities**

mga.ieee.org/mga

- MGA Home (News; Vision and Mission; Geographic Units).
- MGA News (with an archive of former issues of Scoop).
- MGA Board.
- Geographic Unit Operations Resources.
- Regional World Map.
- MGA Committees, Agendas, and Reports.
- MGA Nominations and Appointments.
- MGA Awards and Recognition Program.
- MGA Operations Manual.
- MGA Department (Staff).



#### **MGA Board**

- Chair and Vice President, MGA (Jill Gostin).
- VP-Elect (Deepak Mathur).
- Past Chair (David Koehler).
- Secretary (Cecelia Jankowski).
- Treasurer (Gerardo Barbosa).
- 10 Region Directors.
- 2 Zone representatives
- 3 Vice Chairs:
  - Member Development,
  - Geographic Unit Operations,
  - Information Management,

<sup>72</sup>https://www.ieee.org/societies\_communities/geo\_activities/mga\_bo
## **MGA Board and Committees Structure**





## **Geographic Unit Operations Resources**

www.ieee.org/societies\_communities/geo\_activities/resources

- IEEE Center for Leadership Excellence Training for Geographic Unit Leaders (<u>https://ieee-elearning.org/CLE/</u>).
- Required reporting for Geographic Units.
- IEEE Organization Roster (<u>www.ieee.org/roster</u>).
- IEEE e-Notice (<u>www.ieee.org/enotice</u>).
- OU Analytics (<u>www.ieee.org/samieee</u>).
- vTools (<u>vtools.ieee.org</u>).
- Request for letter to employer.
- Formation and Petitions, Section Bylaws and Addendums, Affinity
  Groups, Chapters, Ordering products.

### **Sections Congress**

- IEEE Sections Congress is a triennial gathering of Section leadership sponsored by the Member and Geographic Activities (MGA) Board.
- It is the one major meeting sponsored by IEEE that brings together the grassroots leadership of IEEE so that they can share ideas, concerns, and solutions.
- It is also a forum where the Section Chairs speak as the collective voice of IEEE members, expressing ideas about how IEEE can better serve its members, both now and going forward. The issues generated at Sections Congress have had a major impact on the plans made by the IEEE leadership for the future of IEEE.
- It involves hundreds of delegates from all ten Regions who have a unique opportunity to learn how to utilize the resources of IEEE to maximize their effectiveness as IEEE volunteer leaders.



### **Sections Congress**

- With workshop, panel, and tutorial sessions held on topics of interest to the Sections during several days of working sessions and **networking**.
- Each Region prepares recommendations that are voted by all Sections Congress delegates. The top five are considered by MGA and IEEE for their plans.
- Recent Sections Congress:
  - Sections Congress 2017 in Sydney, Australia, at the International Convention Centre, from 11 to 13 August 2017.
  - Sections Congress 2020 virtual
- Next Sections Congress: Ottawa (Canada), August 2023

http://sections-congress.ieee.org/



## **Center for Leadership Excellence 1**

### www.ieee.org/cle

- The IEEE Center for Leadership Excellence (CLE) serves as the repository for all leadership training material within IEEE to ensure IEEE keeps pace with its evolving organization.
- Additionally, it will meet the needs of IEEE volunteer leadership by providing materials that will enable volunteers to accomplish their jobs efficiently and effectively, thus allowing them to spend more time ensuring that members are engaged in IEEE activities so that IEEE member satisfaction and relevance continue to grow.



## **Center for Leadership Excellence 2**

- The IEEE CLE makes information easily available with a Learning Library in key areas of education and training. This Library will be updated regularly with new courses as they become available.
- Volunteers will now benefit from having access to full course material for their positions which will provide a one place to go for all their training needs. This includes a Quick Start module to help come up to speed during their first 30 days in their position, a job description for their role, time line of key dates and recommended training modules that support the particular aspect of their role.
- <u>www.ieee.org/cle</u> contains an IEEE Glossary!







## vTools: \*.vtools.ieee.org

- Events (<u>https://events.vtools.ieee.org/</u>) manage Section and Chapter meetings and events.
- **Voting** submit votes in Section officer elections.
- <u>Officers</u> report new officers or officer changes.
- <u>SBR</u> (Student Branch Reporting) collecting and search reports submitted by student branch volunteers.
- <u>WebEx</u> a Web Conferencing service to Geographic Organizational Units for online meetings, webinars, training, demos and presentations.



## **MGA rules for rebate**

- All Sections in existence on 31 December and meeting minimum requirements receive a USD 2,000 annual allowance.
- USD 3 for each Member, Student, or Associate grade member,
   USD 1.50 for Affiliate,

**USD 4** for Senior or Fellow Grade member.

- USD 200 for each chapter and/or affinity group meeting minimum requirements.
- 10% bonus of total rebate to sections who report
  (financial, meeting, and officer) by deadline.

## **MGA rules for rebate**

- All Subsections in existence on 31 December and meeting minimum requirements receive a USD 500 annual allowance:
  - Minimum of 5 meetings,
  - Maintain at least 15 members.



## **MGA rules for rebate**

Activity bonus: to encourage local activities:

- All sections (subsections) reporting 10 meetings or more, at least five of which must be of a technical nature, receive an additional USD 200 (USD 100),
- All chapters or affinity groups reporting
  6 or more meetings of a technical nature shall receive an additional USD 75,
- Joint meetings may be counted toward only one unit's bonus.
- All units must qualify for the timely reporting bonus in order to be eligible for an activity bonus.

## **MGA rules for rebate:**

# Activity and reporting requirements Current officer report: Reports of current section,

- Current officer report: Reports of current section, subsection, chapter, and affinity group officers must be submitted within 20 days following the election and/or appointment of officers.
- Financial report: summary of previous year's financial activities must be submitted annually. If the section is unable to obtain financial records from a subsection, chapter, or affinity group, it may opt to submit a statement that the subunit has failed to submit a timely financial report and waive its right to a rebate for that particular subunit.

## MGA rules for rebate: Activity and reporting requirements

Bank signature card: The bank signature card(s) must be returned to the IEEE Operations Center for the signature of the IEEE Staff Director-Financial Services before the section rebate will be released.

This is required for all bank accounts for Units outside of the US where banking and legal restrictions will allow.

Meeting Activity Report(s): Meeting activity reports are key to unit maintenance and viability. Submit a <u>Meeting Report Form (L31)</u> via the Web for each meeting.



# **MGA Operations Manual**

- 1. Introduction
- 2. Member and Geographic Activities Board
- 3. MGA Financial Matters
- 4. MGA Committees
- 5. MGA Operations Committee
- 6. MGA Assembly
- 7. MGA Nominations and Appointments Process
- 8. Member and Geographic Activities Awards
- 9. Geographic Organizational Units
- **10.** Conferences
- 11. MGA Publications
- <sup>86</sup>12. Revisions to the MGA Operations Manual



# **Volunteer Orientation**

7. Region 8 Committee meetings



# A typical R8 committee meeting

#### What will happen tomorrow?

Committee members are the real stars of the meetings. Everything will be presented, reported, or asked to you.

During the meeting you can expect reports from the different R8 officers and committees; presentations from invited IEEE leaders and staff; healthy discussion about matters pertaining to the Region, the Sections or the members.

The Region Director will chair the meeting and will take care of the order, timing, and progress of items.

Don't be shy! Participate, share your opinion and listen to others!



# How is the meeting organized

The meeting will start with a roll call, when everybody in the room is asked to identify themselves.

The meeting has an agenda. At the beginning you will be asked to approve it. The agenda has been posted at the meeting page on the R8 website.

Then you will be asked to approve the consent agenda. The items there are supposed to be of non-controversial nature. But everybody is entitled to take items out of the consent agenda. If you feel that something needs to be discussed, just raise your hand at this moment.

Then the next items in the agenda will follow, starting with the welcome from the Director and the local Section Chair. Rules of order will be followed.

There will be breaks. Make use of them to know and interact with the rest of the people. After the meeting on Saturday there will be a social event, and the meeting will continue until Sunday before lunch.



# Seating

Seating is predetermined. You will find a sign with your position. Free seats are also available.



# Motions

A motion is a request for the body (the R8 Committee) or some of its members (committees, appointed persons, officers) to do something. As such, a motion always has to have an element of action.

Motions will be presented, discussed and voted.

Any member has the right to propose or discuss a motion. Only those with voting rights will be allowed to vote.

More on motions later.



# **Rules of order**

 Rules of order, also known as standing orders or rules of procedure,

are the written rules of parliamentary procedure adopted by a deliberative assembly, which detail the processes used by the body to make decisions.

IEEE Bylaws I-300. Management

**Robert's Rules of Order** shall be used to conduct business at meetings of the IEEE Board of Directors, Major Boards, Standing Committees and other organizational units of the IEEE unless other rules of procedure are specified in the Not-For-Profit Corporation Law of the State of New York, the IEEE Certificate of Incorporation, the IEEE Constitution, these Bylaws, the IEEE Policies, resolutions of the IEEE Board of Directors, or the applicable governing documents of those organizational units provided such organizational documents are not in conflict with any of the foregoing.



# Origins

- Henry Martyn Robert:
  Pocket Manual of Rules of Order for Deliberative Assemblies, February 1876.
- Loosely modelled after rules used in the United States House of Representatives.
- Robert was an active member of several organizations. To help simplify and organise meetings, he decided to write a manual that would enable organizations to adopt a parliamentary procedure.





# **Rules of order in R8 Committee**

- All members of the Committee have equal rights to participate and take part in debate, except that non-voting members do not have the right to vote.
- Substantial parts of a meeting are organised in an informal way.
- Formal parts of meetings are normally conducted in accordance with Robert's Rules.
  - Robert's Rules are not well known in the countries of Region 8, it cannot be assumed that the R8 Committee members have more than a superficial familiarity with these rules, and this must be allowed for in the conduct of the meetings.
- The Chair should enable an orderly debate to take place on all issues, and allow equal and fair rights to all members of the Committee.
- During formal debates, the Chair must take a neutral position and may only vote in the case of secret vote or to break a tie.



# Main ideas

- Rules of order are used to simplify the parliamentary procedure, not to complicate it.
- Everyone has the right to speak once if they wish, before anyone may speak a second time.
- Everyone has the right to know what is going on at all times.
- Only urgent matters may interrupt a speaker.
- > The members discuss **one thing at a time**.



# The basics of the rules

- One thing at a time. Only one main motion is allowed on the floor at a time, but there is a system to put that motion aside if something more urgent comes up.
- One person, too. Only one person may talk at a time.
- And only one time per meeting. The same motion (or practically the same) can not be made more than once per session; the only exception is if a member changes his or her mind.
- Enough of us have to be here to decide. The group determines the minimum number of people (called a quorum) that must be present to make a decision for the whole group.

Nancy Sylvester, "The complete idiot's guide to Robert's rules," 10 SBN 1-59257-163-8, Alpha, Indianapolis, IN, 2004.



# The basics of the rules (cont'd)

- Protected even if absent. The rights of the members who are absent are protected.
- Vote requirements are based on members' rights. The determination of what kind of vote is needed (such as majority, two-thirds, ...) is based on members' rights. If an action gives rights to the members, it requires a majority vote to pass. If an action takes away rights from members, it requires a two-thirds vote to pass.
- Silence = consent. If a member chooses to abstain from voting, that member is giving his or her consent to the decision made by the group.
- Everybody is equal. All voting members have equal rights. The majority rules but the minority has the right to be heard and to attempt to change the minds of the majority.





#### You want to bring up a new idea before the group.

- After recognition by the chair, <u>present your motion</u>.
- A second is required for the motion to go to the floor for consideration (and the motion now belongs to the body).

### You want a motion just introduced by another person to be killed.

- Without recognition from the chair, state "I <u>object to consideration</u>."
- This must be done before any debate.

103

- This requires no second, is not debatable and requires a 2/3 vote.
  You want to change some of the wording in a motion under debate.
- After recognition by the chair, <u>move to amend</u> by adding words, striking words or striking and inserting words.
- This may be recognised as a friendly amendment by the person (or body) who proposed the original motion.



You like the idea of a motion under debate, but you need to reword it beyond simple word changes.

- Move to substitute your motion for the original motion.
- If it is seconded, debate will continue on both motions and eventually the body will vote on which motion they prefer.

#### You feel the motion addresses two or more separate issues.

Move to divide the question.

You want more study and/or investigation given to the idea under debate.

- Move to refer to a committee.
- Be specific as to the charge to the committee.

You want more time personally to study the proposal under debate.

Move to postpone to a definite time or date.





#### You want to postpone a motion until some later time.

- Move to table the motion.
- The motion may be taken from the table after one item of business has been conducted.
- If the motion is not taken from the table by the end of the next meeting, it is dead.
  You have heard enough debate.
- Move to call the question; this cuts off debate and brings the assembly to a vote on the pending question only.
- Requires a 2/3 vote.

### You want to take a short break.

- <u>Move to recess</u> for a set period of time.
  You want to end the meeting.
  - Move to adjourn.





# You are unsure that the chair has announced the results of a vote correctly.

- Without being recognized, call for a "division of the house."
- At this point a standing vote will be taken.

### You are confused about a procedure being used and want clarification.

- Without recognition, call for "<u>Point of Information</u>" or "<u>Point of Parliamentary Inquiry</u>."
- The chair will ask you to state your question and will attempt to clarify the situation. You have changed your mind about something that was voted on earlier in the meeting for which you were on the winning side.
- Move to reconsider.
- If the majority agrees, the motion comes back on the floor as though the vote had not occurred.



# **Summary of RRO**



You may **INTERRUPT** a speaker for these reasons only:

- to get information about business point of information
- to get information about rules parliamentary inquiry
- if you can't hear, safety reasons, comfort, etc. question of privilege
- if you see a breach of the rules point of order
- if you disagree with the chair's ruling appeal
  You may influence WHAT the members discuss:
- if you would like to discuss something motion
- if you would like to change a motion under discussion amend
  You may influence HOW and WHEN the members discuss a motion:
- if you want to discuss the topic at another time postpone or lay it on the table
  - if you think people are ready to vote call the question



| То:  | You say:   | Interrupt<br>Speaker | Second<br>Needed | Debat<br>~able   | Amend<br>~able | Vote<br>Needed |
|--|--|----------------------|------------------|------------------|----------------|----------------|
| Adjourn  | "I move that we adjourn"                                       |                      | Yes              | No               | No             | Majority       |
| Recess   | ess "I move that we recess until"                              |                      | Yes              | No               | Yes            | Majority       |
| Complain about noise,<br>room temp., etc.        |  |                      | No               | Chair<br>Decides |                |                |
| Suspend further<br>consideration of<br>something | <b>No Yes</b>  |                      | Yes              | No               | No             | Majority       |
| End debate                                       | End debate      "I move the question"      No                  |                      | Yes              | No               | No             | 2/3            |
| Postpone<br>consideration of<br>something        | <b>consideration of</b> "I move we postpone this matter until" |                      | Yes              | Yes              | Yes            | Majority       |
| Amend a motion                                   | "I move that this motion be amended by"                        | No                   | Yes              | Yes              | Yes            | Majority       |
| Introduce business<br>(primary motion)           | "I move that"  | No                   | Yes              | Yes              | Yes            | Majority       |



| To:                                  | You say:   | Interrupt<br>Speaker | Second<br>Needed | Debat<br>~able                | Amend<br>~able                       | Vote<br>Needed   |
|--------------------------------------|--|----------------------|------------------|-------------------------------|--------------------------------------|------------------|
| Object to procedure                  | "Point of order"   | Yes                  | No               | No                            | No                                   | Chair<br>decides |
| Request information                  | "Point of information"   | Yes                  | No               | No                            | No                                   | None             |
| Ask for vote by actual count         | "I call for a division of the house" Must be<br>done before No<br>new motion |                      | No               | No                            | None<br>unless<br>someone<br>objects |                  |
| Object to considering<br>some matter | "I object to consideration of this question"                                 | Yes                  | No               | No                            | No                                   | 2/3              |
| Take up matter<br>previously tabled  |  |                      | Yes              | No                            | No                                   | Majority         |
| Reconsider something                 | nsider something "I move we now (or later) reconsider our Area Yes Yes       |                      | Yes              | Same as<br>original<br>motion | No                                   | Majority         |
| Vote on a ruling by the<br>Chair     | "I appeal the Chair's decision"  | Yes                  | Yes              | Yes                           | No                                   | Majority         |



# **Volunteer Orientation**

8. Expense reporting and basics of finances



# **Volunteer Orientation**

9. Concluding remarks



## Some general remarks to Section Chairs

- Complete ExComs (A&R, YP, MD, PA, SAC, SSR, ...).
- Allocate sufficient budget for your officers.
- Reporting: officers (please update!), meetings, finances.
- ExCom task descriptions Training needs.
- Center for Leadership Excellence.
- Recognize your volunteers Section awards.
- Recognize your activities Region 8 News.
- Keep your members informed Web site, Newsletter.
- Member Benefits (<u>www.ieee.org/start</u>).
- New Member Orientation Webinars (<u>www.ieee.org/start</u>).
- Contact and support (<u>www.ieee.org/about/contact\_center/</u>).
- Support center (<u>https://supportcenter.ieee.org</u>) 24/5.



### **IEEE** SUPPORT CENTER

Support Home

Answers (FAQ)

**Submit A Question** 



| ost Popular Questions  |  | Find Answers                                       |
|--|--|--|
| How do I renew my annual membership?   | How can I access the 2012 IEEE Special<br>Interest Memberships and Subscriptions | Search   |
| Here can I make shanges to my 2012 annual  | catalog for Professional or Student?   | Support  |
| How can I make changes to my 2012 annual<br>renewal invoice?                                   | What are the changes to Xplore?  | Support  |
|  | How do the new upgrades and<br>enhancements affect myIEEE?                       | IEEE Contact Center                                |
| What are the advantages of using the new<br>IEEE e-commerce platform?                          | <u>Why is IEEE upgrading its web sites and</u><br>systems?                       | <b>D</b> Live Chat                                 |
| Where do I go to recover my username and   | How do I register for an IEEE Web Account?                                       | Chat with a member of<br>our support team.         |
| password if I forgot it?   | <u>When can I expect to receive my</u><br><u>Membership Card?</u>                | Give Feedback                                      |
| How can I find out the status, and expected delivery of my publications to which I subscribed? | Can I change my web account information?   | How can IEEE make this<br>site more useful for you |
|  |  | Tips for Searching FAQs                            |
| See all popular questions  | Browse the <b>Popular Questions</b><br>section for the most current and          |  |



- AIEE : American Institute of Electrical Engineers
- A&R : Awards and Recognition
- BoD : Board of Directors
- CLE : Center for Leadership Excellence
- EAB : Educational Activities Board
- ECC : Electronic Communications Coordinator
- EMEA : Europe, Middle East, Africa (= Region 8)
- EPICS : Engineering Projects in Community Service
- ExCom : Executive Committee (in Section or Regions)
- GSM : Graduate Student Member



- IBP : IEEE Business Platform
- ICP : Interactive Content Project
  - ICX : IEEE Conference Exchange
  - IEL : IEEE/IET Electronic Library
  - IET : Institution of Engineering and Technology
- IRE : Institute of Radio Engineers
- MD : Membership Development
- MGA : Member and Geographic Activities
- N&A : Nominations and Appointments

121

OU

- NIC : New Initiative Committee
- OpCom : Operating Committee (in Region 8)
  - : Organizational Unit



- PA : Professional Activities
- POCO : Panel of Conference Organizers
- PSPB : Publication Services and Products Board
- RSR : Region Student Representative
- SA : Standards Association
- SAC : Student Activities (sub)Committee
- SAMIEEE : Section/Society Access to Membership IEEE
- SBC : Student Branch Congress
- S/C : Society/Council
  - SPC : Strategic Planning Committee
- SPC : Student Paper Contest

122

SSR : Section Student Representative



- STEM : Science, Technology, Engineering, Mathematics
- STEP : Student Transition and Elevation Partnership
- TAB : Technical Activities Board
- TCS : Technical Co-Sponsorship/ed
- TISP : Teacher In-Service Program
- VCF : Voluntary Contribution Fund
- VC : Vice Chair
- VP : Vice President
- WiE : Women in Engineering
  - YP : Young Professionals







## **Questions?**

