

New Volunteer Orientation

Vincenzo Piuri

Region 8 Past-Director 2025-2026

Vincenzo.Piuri@unimi.it

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

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™ 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. [link](#) .
- Geographic Units FAQ's <https://supportcenter.ieee.org> .
- 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



**IEEE
Region 8**

IEEE quick facts (1)

- ▶ More than **460,000 members** in 190 countries; 36% live in the United States (R1-R6), 64% in R7-R10.
- ▶ More than **145,000 student members**.
- ▶ **349 Sections** in 10 geographic Regions worldwide.
- ▶ **2,820 Chapters** unite local members with similar technical interests.
- ▶ **3,638 Student Branches** at colleges and universities in 100 countries.
- ▶ **5,045 Student Branch Chapters** of IEEE Technical Societies.

IEEE quick facts (2)

- ▶ **767 Affinity Groups**, non-technical sub-units: Young Professionals (YP), Women in Engineering (WIE), Life Members (LM), IEEE-USA Consultants' Network.
- ▶ **39 Societies, 8 Technical Councils and 15 Technical Communities** representing the wide range of IEEE technical interests.
- ▶ More than **6.7 million documents** in IEEE Xplore Digital Library,
 - more than **15 million downloads** each month.
- ▶ More than **1,000 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

Member grades

- **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.

Member grades

- **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 grades

- **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.

Member grades

- **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 fields.

Member grades

- **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,
 - **349** Sections within Regions,
 - **3,638** 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, **8** Technical Councils, and **15** general Technical Communities,
 - **2,820** Chapters that unite local members with similar technical interests,
 - **5,045** Student Branch chapters of Technical Societies.

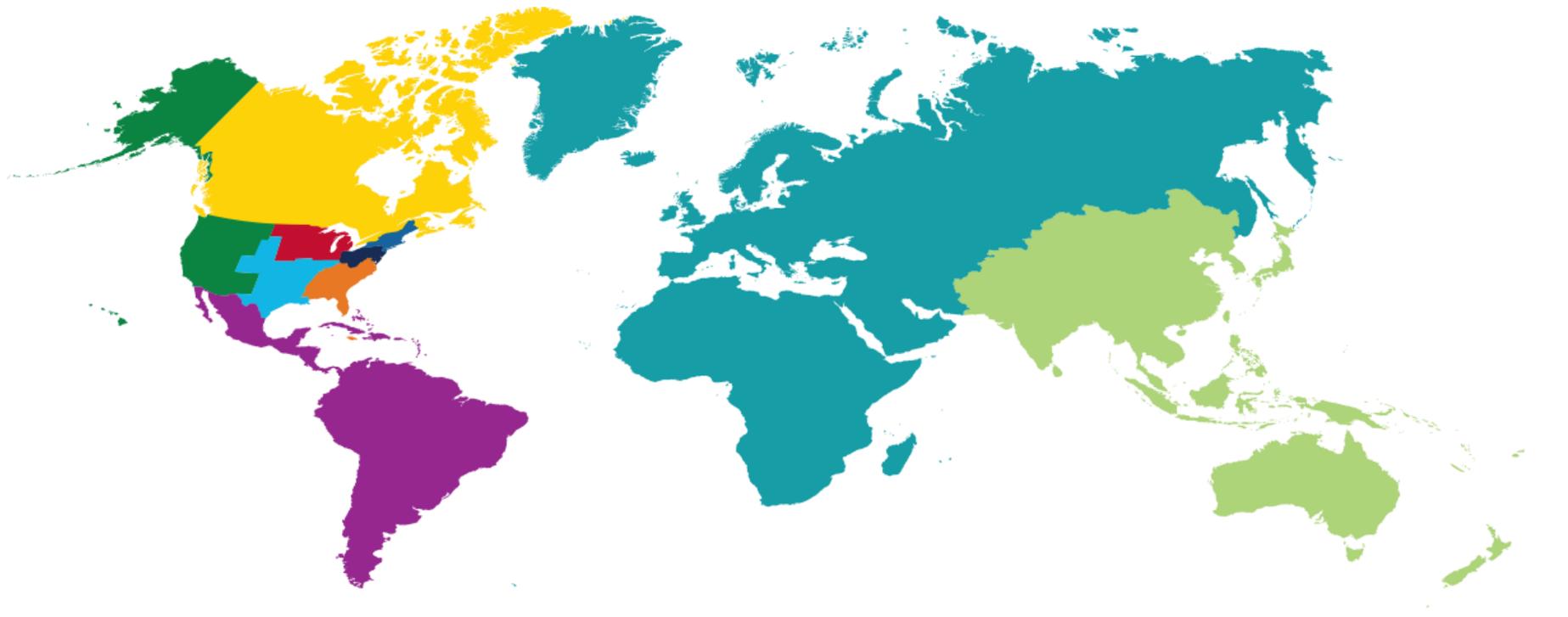
<http://www.ieee.org/about/today>



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:
 - [Consultants Network](#) , CN,
 - [Life Members](#) , LM,
 - [Women in Engineering](#) , WIE,
 - [Young Professionals](#) , YP (formerly GOLD).
 - With a total of **767** affinity groups worldwide which are non-technical subunits of one or more Sections or Regional Councils.
- ▶ Other groups are:
 - IEEE Entrepreneurship (<http://entrepreneurship.ieee.org/>),
 - Special Interest Group on Humanitarian Technology (https://www.ieee.org/special_interest_group_on_humanitarian_technology.html) and other groups focusing on humanitarian efforts,
 - And several virtual communities.

IEEE Regions



IEEE Divisions

39 Societies and **8 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)
- IX. Signals and Applications (AES, GRS, IT, ITS, OE, SP, VT)
- ²⁵X. Systems and Control (CIS, CS, EMB, Pho, RA, SMC; Bio, Sen, Sys)



IEEE

**IEEE
Region 8**



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™

IEEE Section – the basic GeoUnit

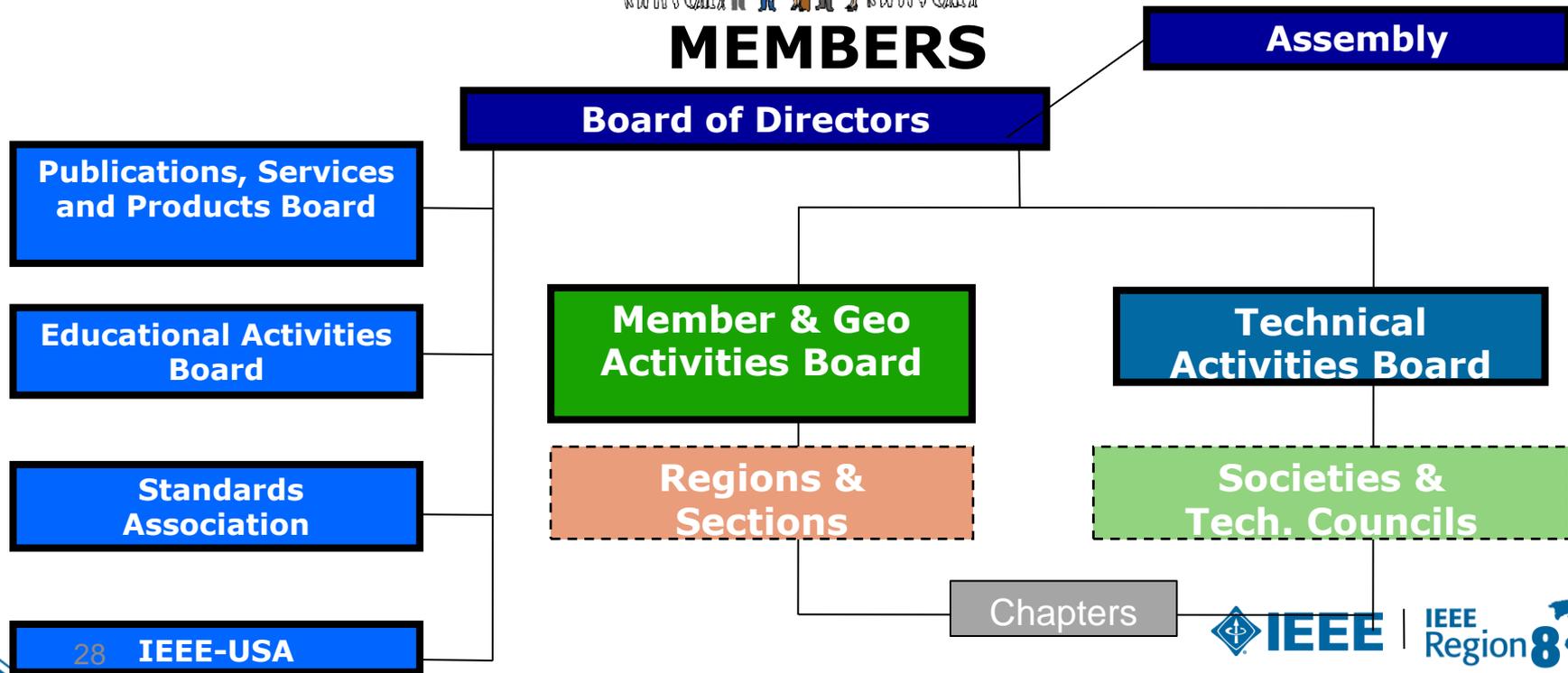
- ▶ Sections provide a local community of colleagues.
- ▶ Members build a network through activity in
 - Sections,
 - Chapters within the Section,
 - Student Branches within the Section.
- ▶ Volunteers develop new skills and experience:
 - Management,
 - Teamwork,
 - Leadership.
- ▶ Volunteers:
 - Gain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



IEEE Governance Organization



MEMBERS



IEEE

**IEEE
Region 8**



IEEE Organization

▶ IEEE Board of Directors

- **31 voting members: 3 “Presidents” + 6 Vice Presidents + Secretary + Treasurer + 10 Regional Directors + 10 Division Directors**
- voting members of IEEE elects a **President** each year (serving for three years: President-Elect, President and CEO, Past-President)

▶ IEEE Assembly

- **23 voting members: 3 Presidents + 10 Regional Directors + 10 Division Directors**

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.



IEEE-USA

- Government Relations
- Government Fellows Committee
- Government Relations Council
- Career and Member services

TECHNICAL ACTIVITIES

- All Society Publications
- Conferences Committee
- Conference Events
- Conference Proceedings
- Chapters
- Future Directions Committee
- Societies, Councils and Technical Committees

STANDARDS ASSOCIATION

- Standard Working Groups
- IEEE Registration Authority
- Industry Standards & Tech Org (ISTO)

IEEE Global OU Structure:

Six Major Boards (OUs) defined in IEEE Policies with different responsibilities, but equivalent in our structure; no hierarchy of OUs defined in our governance

EDUCATIONAL ACTIVITIES

- Continuing Professional Education
- Engineering Accreditation Activities
- Pre-University Education

PUBLICATION SERVICES AND PRODUCTS

- IEEE Press
- IEEE Spectrum
- Proceedings of the IEEE
- The Institute

MEMBER & GEOGRAPHIC ACTIVITIES

- Regions, Sections, and Chapters
- Student Branches



IEEE OFFICE LOCATIONS

Corporate Headquarters:

New York, NY, USA

Operations Center:

Piscataway, NJ, USA

California Office:

Los Alamitos, CA, USA

Washington, D.C. Office:

Washington, DC, USA

IEEE India Office:

Bangalore, Karnataka, India

IEEE Asia-Pacific:

Solaris, Singapore

IEEE China Office:

Beijing, China

IEEE Japan Office:

Tokyo, Japan

IEEE Austria Office:

Vienna, Austria



Volunteer Orientation

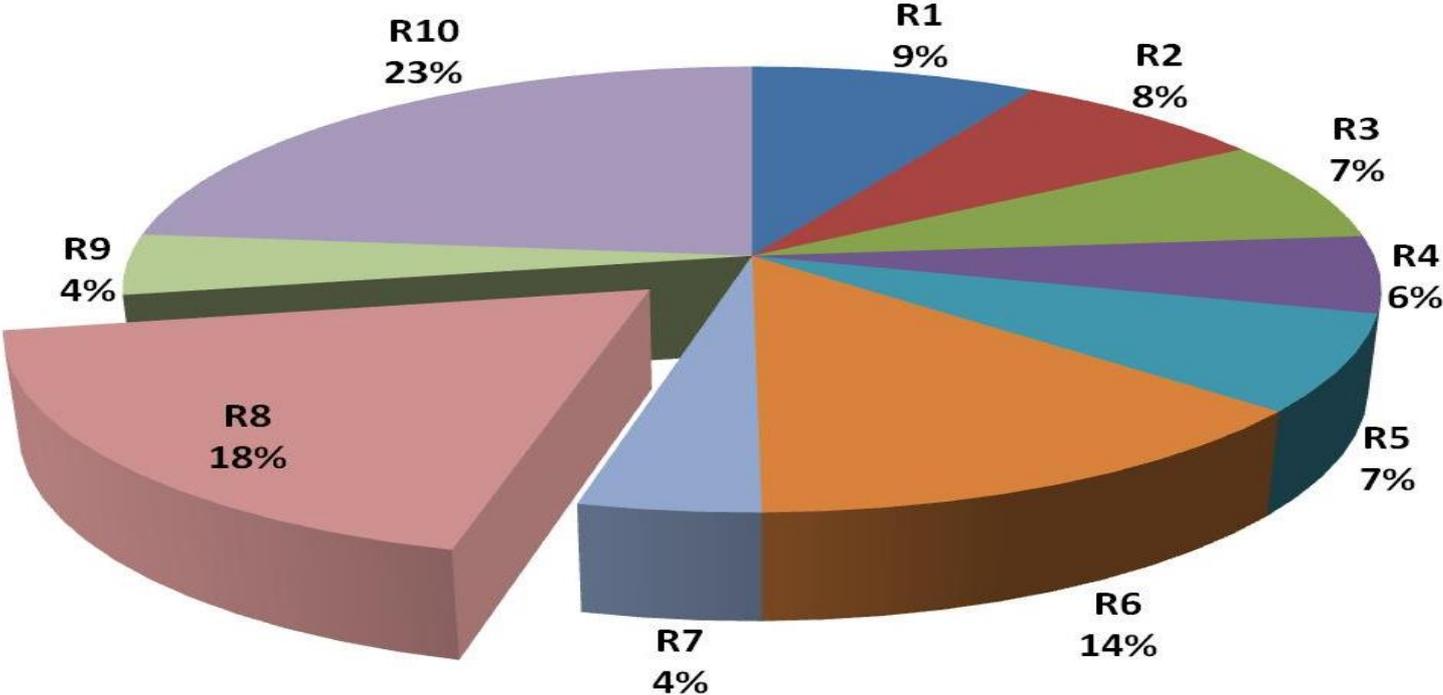
3. Short overview of Region 8

Region 8 covers Europe, Middle East, and Africa



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

Percentage of total IEEE Membership by Region



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

R8 Organizational Units data

- 59 Sections
- 13 Subsections
- 1 Council: Africa Council
- 674 Society Chapters
- 112 Affinity Groups
- 812 Student Branches
- 777 Student Branch Chapters
- 220 Student Branch Affinity Groups



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)



Mike Hinchey



Vincenzo Piuri



Dusanka Boskovic



Ljupco Karadzinov



Adam Jastrzebski



Tiziana Tambosso



Habib Kammoun



Theodoros Panagiotis

Committee members

- **OpCom**

- **Director:** Mike Hinchey (UK and Ireland)
- **Director-Elect:** Dusanka Boskovic (Bosnia and Herzegovina)
- **Past-Director:** Vincenzo Piuri (Italy)
- **Secretary:** Ljupco Karadzinov (North Macedonia)
- **Treasurer:** Adam Jastrzebski (UK and Ireland)
- **Vice-Chair, Member Activities:** Habib Kammoun (Tunisia)
- **Vice-Chair, Student Activities:** Theodoros Panagiotis (Greece)
- **Vice-Chair, Technical Activities:** Tiziana Tambosso (Italy)

Committee members

- **All Section Chairs:**

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

- **Interface to members.**

Africa Council

- Africa has 11 Sections, 6 Sub-Sections and more than 6,000 active members across the continent's 54 countries. 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: www.ieeer8.org .

R8 Conferences

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



IEEE Conferences in R8 (partial view)



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.

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.

IEEE Convene



Volunteer Orientation

4. Running a Section successfully

Region Vitality

Main goal is to have vital sections and subsections serving their members:

- successful operation

- timely reporting (officers, meetings, and financials) to receive their rebates

- successfully retaining and recruiting members,

- training new volunteers and

- holding elections on time following the MGA Operations Manual.

Region Vitality

Financial reporting: the goal is to achieve 100% submission before the reporting deadline and to encourage GEO units to qualify for their rebate bonus.

Section election: the goal is to support sections in the process of electing Section officers for the next two-year term.

Region Vitality: <https://ieeer8.org/category/region-vitality/>

What a Section Chair does

- Runs the Section
- Find 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?

- Elections for all officers shall:
 - take place every one or two years, in accordance with the term of office as defined by the Section.
 - involve all voting members and use vtools to support the voting
- 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 9.5.F

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: <http://sites.ieee.org/vtools/>),
 - Entity Web Hosting (service to develop, create and maintain websites on an IEEE host: <http://sites.ieee.org/>).
- IEEE Officer Confirmation Report: <http://officers.vtools.ieee.org/>
- Meeting Reports: https://events.vtools.ieee.org/tego_authentication/sign_in?landing=/meeting_report/search

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.

Section Vitality Checklist

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



Section Vitality Checklist

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.*

Section Vitality Checklist

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.

Section Vitality Checklist

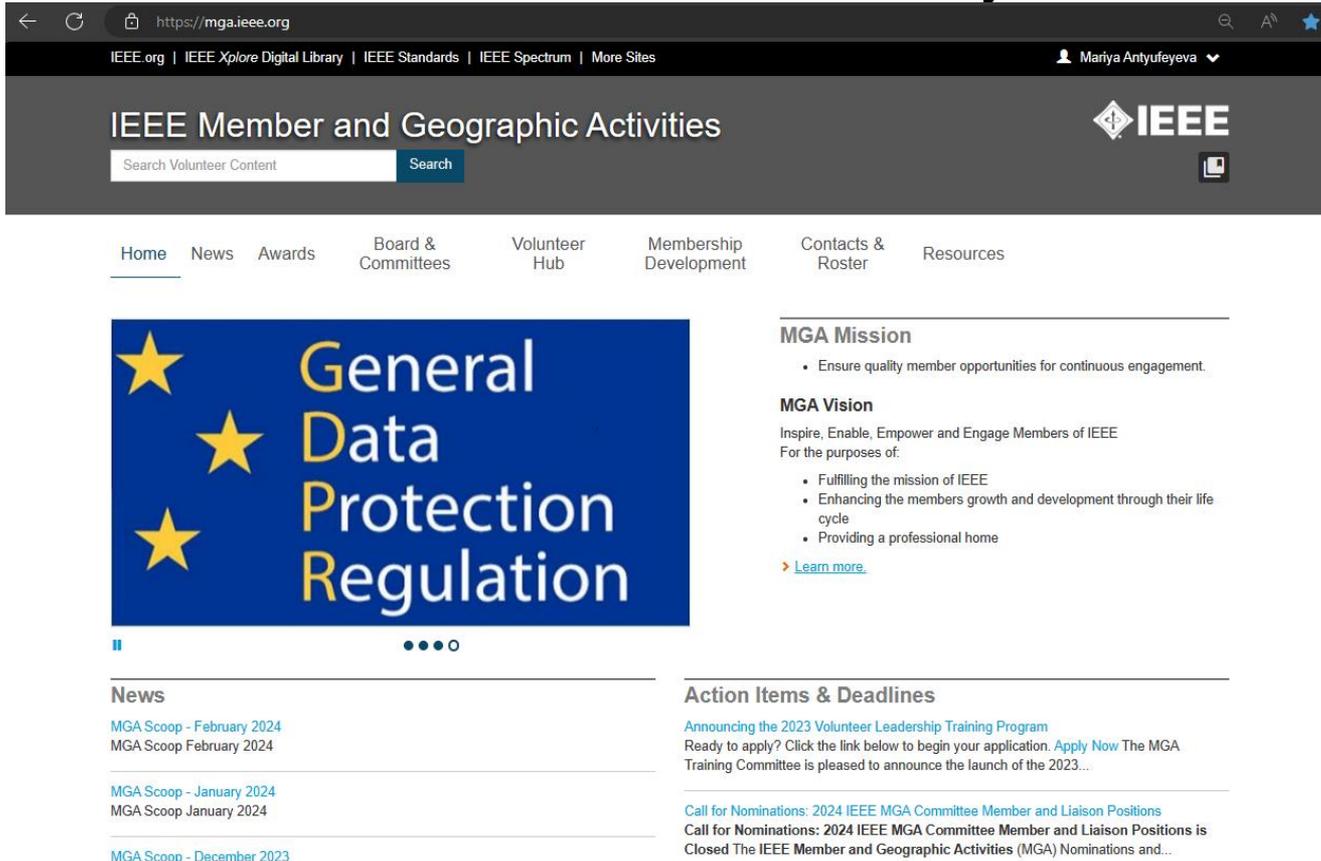
Fourth Quarter of the Year (October – December)

- 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?

Volunteer Orientation

5. OU Analytics

OU Analytics



The screenshot shows the IEEE Member and Geographic Activities (MGA) website. The browser address bar displays <https://mga.ieee.org>. The navigation menu includes Home, News, Awards, Board & Committees, Volunteer Hub, Membership Development, Contacts & Roster, and Resources. A search bar is present with the text "Search Volunteer Content" and a "Search" button. The main content area features a large blue banner for "General Data Protection Regulation" with three yellow stars. Below the banner is a "News" section with three articles: "MGA Scoop - February 2024", "MGA Scoop - January 2024", and "MGA Scoop - December 2023". To the right, there are sections for "MGA Mission" (Ensure quality member opportunities for continuous engagement), "MGA Vision" (Inspire, Enable, Empower and Engage Members of IEEE), and "Action Items & Deadlines" (Announcing the 2023 Volunteer Leadership Training Program, Call for Nominations: 2024 IEEE MGA Committee Member and Liaison Positions).

The site <https://mga.ieee.org/> is an indispensable IEEE volunteer assistant

OU Analytics

https://mga.ieee.org/volunteer-hub

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

Mariya Antyfeyeva

IEEE Member and Geographic Activities

Search Volunteer Content Search

Home News Awards Board & Committees **Volunteer Hub** Membership Development Contacts & Roster Resources

/ Home / Volunteer Hub

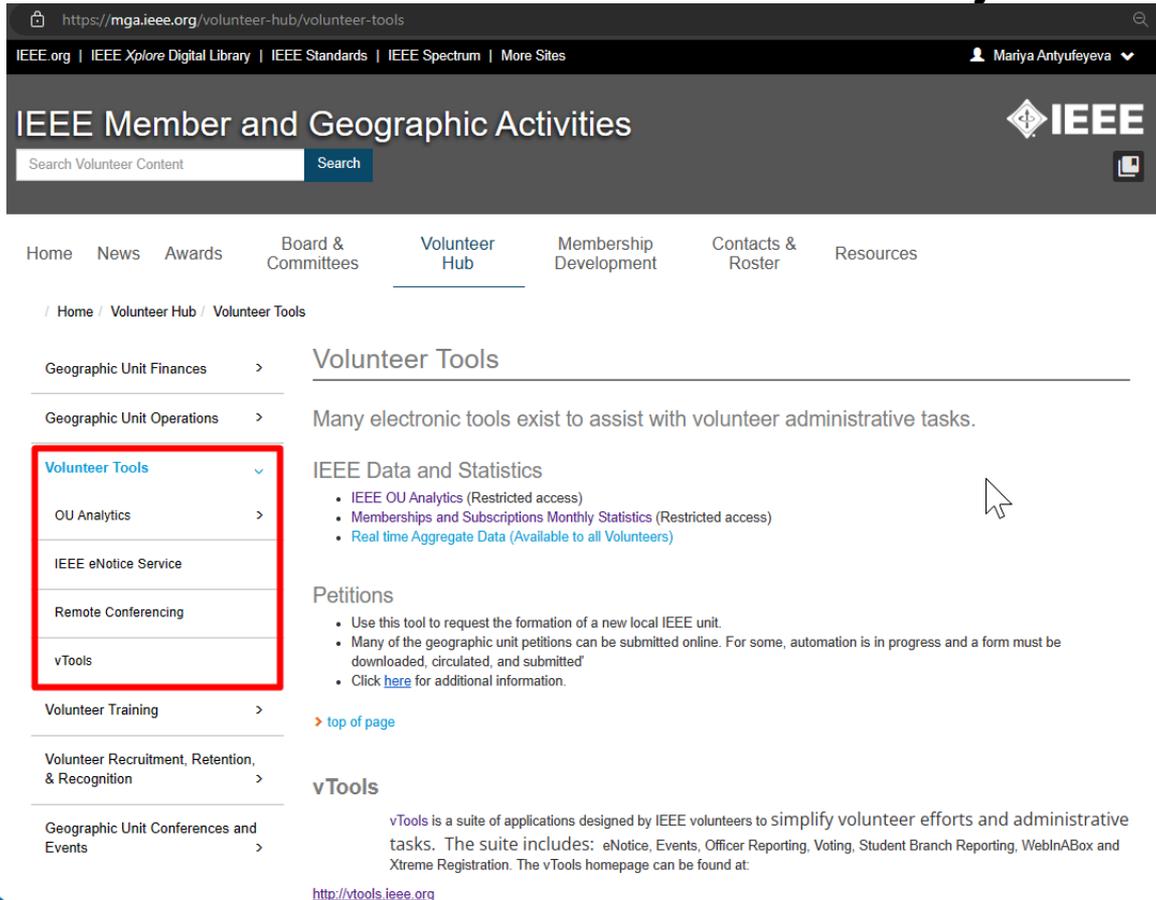
Volunteer Hub

Hello, Mariya, what would you like to do today?

- Geographic Unit Finances
- Geographic Unit Operations
- Volunteer Tools
- Volunteer Training
- Volunteer Recruitment, Retention, and Recognition
- Geographic Unit Conferences and Events

The Volunteer Hub contains the set of volunteer tools and links on the one page <https://mga.ieee.org/volunteer-hub>

OU Analytics



The screenshot shows the IEEE Member and Geographic Activities website. The URL is <https://mga.ieee.org/volunteer-hub/volunteer-tools>. The page title is "IEEE Member and Geographic Activities". The navigation menu includes Home, News, Awards, Board & Committees, Volunteer Hub, Membership Development, Contacts & Roster, and Resources. The Volunteer Hub is selected. The main content area is titled "Volunteer Tools" and contains the following sections:

- Geographic Unit Finances >
- Geographic Unit Operations >
- Volunteer Tools** (highlighted with a red box) >
- OU Analytics >
- IEEE eNotice Service
- Remote Conferencing
- vTools
- Volunteer Training >
- Volunteer Recruitment, Retention, & Recognition >
- Geographic Unit Conferences and Events >

The "OU Analytics" option is highlighted with a red box. The main content area also includes the following sections:

- Volunteer Tools**
 - Many electronic tools exist to assist with volunteer administrative tasks.
- IEEE Data and Statistics**
 - IEEE OU Analytics (Restricted access)
 - Memberships and Subscriptions Monthly Statistics (Restricted access)
 - Real time Aggregate Data (Available to all Volunteers)
- Petitions**
 - Use this tool to request the formation of a new local IEEE unit.
 - Many of the geographic unit petitions can be submitted online. For some, automation is in progress and a form must be downloaded, circulated, and submitted
 - Click [here](#) for additional information.
- [top of page](#)
- vTools**
 - vTools is a suite of applications designed by IEEE volunteers to simplify volunteer efforts and administrative tasks. The suite includes: eNotice, Events, Officer Reporting, Voting, Student Branch Reporting, WebInABox and Xtreme Registration. The vTools homepage can be found at: <http://vtools.ieee.org>

Finally, Volunteer Tools option leads us to information about eNotice and vTools, and IEEE Data and Statistics <https://mga.ieee.org/volunteer-hub/volunteer-tools>

OU Analytics

The screenshot shows the IEEE Member and Geographic Activities page. The browser address bar displays <https://mga.ieee.org/volunteer-hub/volunteer-tools/ou-analytics>. The page header includes navigation links for IEEE.org, IEEE Xplore Digital Library, IEEE Standards, IEEE Spectrum, and More Sites, along with a user profile for Mariya Antyufeyeva. The main title is "IEEE Member and Geographic Activities" with a search bar for "Search Volunteer Content". The navigation menu includes Home, News, Awards, Board & Committees, Volunteer Hub (selected), Membership Development, Contacts & Roster, and Resources. The breadcrumb trail is Home / Volunteer Hub / Volunteer Tools / OU Analytics. The left sidebar contains links for Geographic Unit Finances, Geographic Unit Operations, Volunteer Tools, OU Analytics (highlighted with a hand cursor), Who Has Access, Data Access and Use Policy, Reference Materials, Questions & Answers, and OU Analytics - User Groups. The main content area features the heading "IEEE OU Analytics" and the sub-heading "A visual business intelligence tool for volunteer access to member data". A large call-to-action button reads "<< Access IEEE OU Analytics >>". Below this, a note states: "Use of IEEE OU Analytics must be in accordance with the IEEE Data Access and Use Policy." A section titled "Expanded Access for All Volunteers" explains that access to dashboards is open to all current reported volunteers, with reports containing member detail information and current counts. A list of links includes: Access the MAP Module, Access the Doublet Dashboard, and Access the Memberships and Subscriptions Monthly Statistics. The page number 67 is visible at the bottom left.

Page “Access IEEE OU Analytics”
<https://mga.ieee.org/volunteer-hub/volunteer-tools/ou-analytics>

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).

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

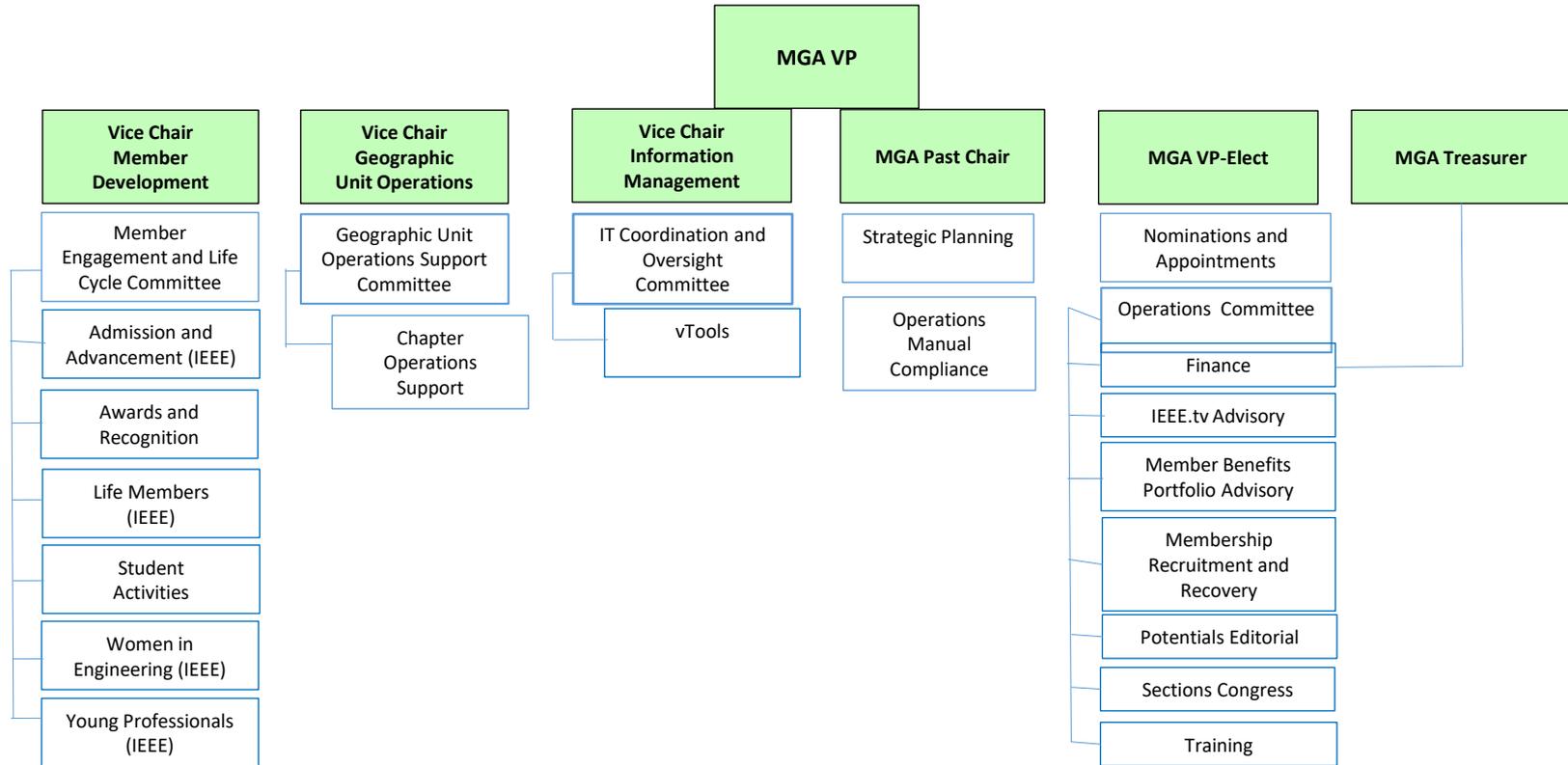
- MGA Home (News; Vision and Mission; Geographic Units).
- MGA News (with an archive of former issues of Scoop).
- **MGA Board.**
- **Geographic Unit Operations Resources.**
- Regional World Map.
- MGA Committees, Agendas, and Reports.
- MGA Nominations and Appointments.
- MGA Awards and Recognition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

MGA Board

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

https://www.ieee.org/societies_communities/geo_activities/mga_board.html

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 (<https://iee-elearning.org/CLE/>).
- Required reporting for Geographic Units.
- IEEE Organization Roster (www.ieee.org/roster).
- IEEE e-Notice (www.ieee.org/enotice).
- OU Analytics (www.ieee.org/samiee).
- **vTools** (vtools.ieee.org).
- 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 2020 virtual
 - Sections Congress 2023 in Ottawa (Canada), August 2023
- Next Sections Congress: 2026 in Region 8
<http://sections-congress.ieee.org/>

Sections Congress Recommendations

- Recommendations approved during SC 2023
 - **#9 Provide continuing incentives to volunteers.** IEEE needs to provide more incentives to increase the number of volunteers. These incentives would contribute to recognizing volunteers' value and time investment. Incentive examples: IEEE to send letters to employers recognizing their employees' service to the profession, IEEE to provide free membership for the years of volunteer service, IEEE to provide a plaque stating the IEEE years of service, IEEE Badge for LinkedIn profile, IEEE to provide a swag bag with IEEE items.
 - **#29 Continuous Education in the IEEE professional field.** Partner with other professional organizations for continuing education. This could include training and courses that lead to credentials such as digital badges, certificates and professional development units or hours. Collaboration with others can promote the IEEE brand and expand the influence of IEEE among professional organizations and their members. Integration and awareness with larger organizations will also serve to benefit IEEE members as credentials receive wider recognition.
 - **#10 Provide support, education and processes for working with Student Chapters & building relationships with Sections.** The exact relationship between student branches, faculty advisors, and sections is unclear. This has led to some student branches that use the IEEE name but have no official affiliation with the IEEE. Furthermore, the path to officially tie these student branches to the IEEE and local sections is unclear.
 - **MGA-level AdHoc formed to address these recommendations**

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.
- www.ieee.org/cle contains an IEEE Glossary!

vTools - Windows Internet Explorer
http://sites.ieee.org/vtools/

Arχείο Επεξεργασία Προβολή Αγαπημένα Εργαλεία Βοήθεια

★ Αγαπημένα
O Internet Explorer δεν μ... HomeForExchange.com - ... China Wholesale - Logo L... O Internet Explorer δεν μ... O Internet Explorer δεν μ... 5 PCS 100% Silk Luxury W...

Facebook (15) 2011, March - Lond... vTools

IEEE Home | Join IEEE | Log in

vTools

- Home
- Blog
- Contact
- FAQ
- Training
- Status

Search »

vTools are developed and made possible by IEEE volunteers. The toolbox simplifies administration by offering web based software, reduces time spent managing activities, and assists in member development.

vTools is sponsored by IEEE Membership and Geographic Activities (MGA). MGA serves the needs of IEEE members by supporting IEEE Sections, Chapters, and Branches and is responsible for IEEE membership, and member development.

vTools toolkit contains tools in various phases of development, from production, to pilots, to active development:

vTools.Meetings – tool for managing section and chapter meetings. Officers can create meeting announcements with no dependence on webmaster availability and show them on your website. Members and the public may see and register for the upcoming meetings. **Visit project WIKI page** for more information or [click here to use the tool](#).

vTools.WebInABox – wizard to assist officers generate simple section websites in an automated fashion with no dependence on webmaster availability. **Visit project WIKI page** for more information or [click here to use the tool](#).

vTools.Voting – tool to allow members submit votes in their Section officer elections online (please note that this is different from the general IEEE elections). **Visit project WIKI page** for more information or [click here to use the tool](#).

vTools Mission

Providing tools to the volunteers and staff who support our members.

Quick Links

- Create a WebInABox site
- Schedule a Meeting
- Setup a Survey
- Setup a Web Conference
- Setup an election
- Submit L31 report
- Vote in an election

Κέντρο υπ... London Αφαιρούμε... Αφαιρούμε... vTools - Wi... Inbox - Mic... responses18 Microsoft P... EN 9:26 μμ

vTools: *.vtools.ieee.org

- **Events** (<https://events.vtools.ieee.org/>) – manage Section and Chapter meetings and events.
- **Voting** – submit votes in Section officer elections.
- **Officers** – report new officers or officer changes.
- **SBR** (Student Branch Reporting) – collecting and search reports submitted by student branch volunteers.
- **WebEx** – 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, 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 [Meeting Report Form \(L31\)](#) 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
- ⁸⁸12. Revisions to the MGA Operations Manual



IEEE



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.

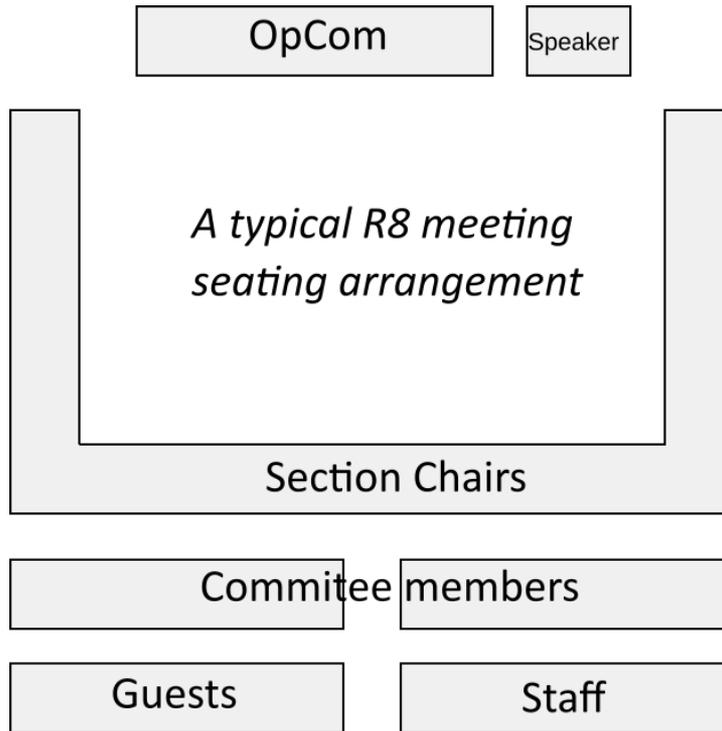
Then you will be asked to approve the consent agenda. The items there are supposed to be of non-controversial nature. But everybody is entitled to take items out of the consent agenda. If you feel that something needs to be discussed, just raise your hand at this moment.

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.

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.

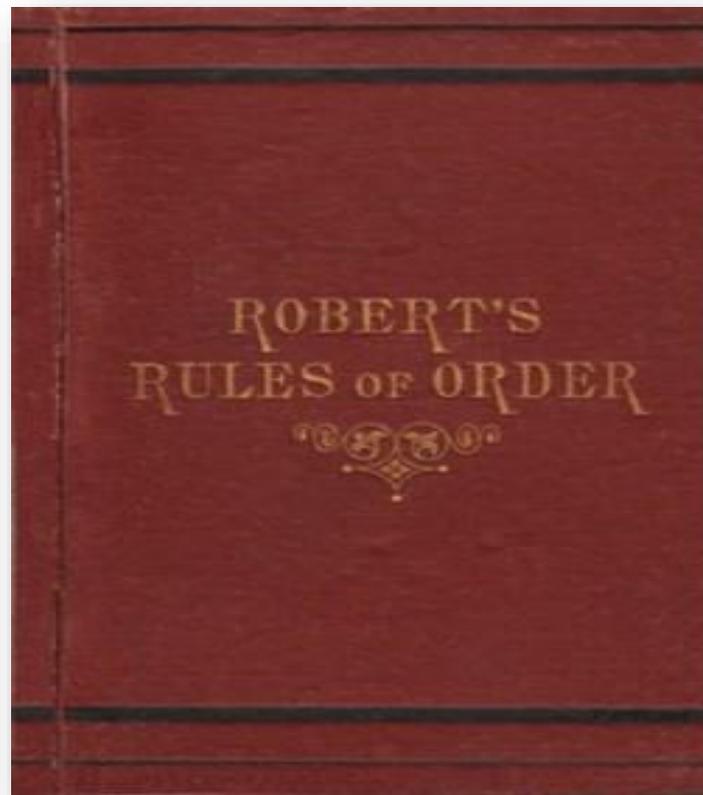
Rules of order



- ▶ **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,”
ISBN 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.

How to do things ...



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

- ▶ After recognition by the chair, present your motion.
- ▶ 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 object to consideration.”
- ▶ This must be done before any debate.
- ▶ 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, move to amend 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.

How to do things ...



**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.

How to do things ...



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.

- ▶ Move to recess for a set period of time.

You want to end the meeting.

- ▶ Move to adjourn.

How to do things ...



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 “Point of Information” or “Point of Parliamentary Inquiry.”
- ▶ 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**

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

To:	You say:	Interrupt Speaker	Second Needed	Debat ~able	Amend ~able	Vote Needed
Object to procedure	"Point of order"	Yes	No	No	No	Chair 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 done before new motion	No	No	No	None unless someone objects
Object to considering some matter	"I object to consideration of this question"	Yes	No	No	No	2/3
Take up matter previously tabled	"I move we take from the table..."	Yes	Yes	No	No	Majority
Reconsider something	"I move we now (or later) reconsider our action relative to..."	Yes	Yes	Same as original motion	No	Majority
Vote on a ruling by the Chair	"I appeal the Chair's decision"	Yes	Yes	Yes	No	Majority

Volunteer Orientation

8. Expense reporting and basics of finances

Reporting your expenses

- ▶ **Travelling on IEEE business (from FOM.6)**

It is IEEE policy to provide for, or reimburse, **reasonable authorized travel expenses** incurred in connection with the conduct of IEEE business. All persons traveling on IEEE business for whom IEEE pays or reimburses transportation expenses shall **travel economically by booking economy class flights well in advance** and shopping for low-cost business class train fares and low-cost rental car rates. Guidelines and procedures for reimbursement are available.

IEEE does not reimburse for the travel expenses of spouses or travel companions as an entitlement. **Airfare, hotel, and incidental costs of spouses or travel companions are never covered** but it is recognized that there are occasions where the demand on volunteer time in particular, requires travel with a spouse or companion which may result in some meal costs being expensed. Since the purpose of the business trip is already deemed necessary and the only incremental cost is the spouse/companion meals, **expensing the meals is acceptable as long as the cost is reasonable and the practice is not perceived as an entitlement. Spouse/companion costs for purely social gatherings must be reimbursed on the staff or volunteer person's expense report as a reduction of reimbursed expenses.**

Allowable expenses

- ▶ In general, everything that is reasonable to spend to do the IEEE business at a given place.
- ▶ Always book the cheapest economy ticket available.
- ▶ Meal expenses are refundable up to \$100 per day (this is not a daily allowance).
- ▶ Meals are not reimbursed if they are provided by the event organization.
- ▶ Extra hotel cost for a double room to include a companion is covered (R8)
- ▶ Meals of companions participating in business meetings are covered (R8)
- ▶ Visa processing fees are refundable. Credit card processing charges too.
- ▶ As a general rule, try to share taxis or use other public transportation if possible.
- ▶ You can combine IEEE and personal travel if you follow these guidelines.

Using Concur for reimbursement -1

- ▶ Give your claim a title describing the event for which you claim. Add Comment.
- ▶ Make certain you use correct expense type and claim from the correct Expense Report Purposes (ERPs). Ask event organizer for ERPs, if not certain.
- ▶ Although it is possible in Concur to combine claims, this may be confusing for the volunteer Approvers as they are different Approvers for different ERPs → avoid.
- ▶ Claim only for expenses which are allowed by Region 8.
- ▶ Use Comments to explain not so obvious expenses.
- ▶ Enter amounts in the currency that was used (not your currency). Differences can also be claimed.

Using Concur for reimbursement - 2

- ▶ Although it is formally not compulsory to attach scanned receipts for expenses under \$25 or 25€, we would like to see all of them. Credit cards statements alone are not sufficient.
- ▶ If you lost a receipt, you need to attach and sign a Missing Receipt Declaration.
- ▶ Details for items labeled “Miscellaneous” or “Other” MUST be provided in the Comment field.
- ▶ Submit your report before 60 days. Late reports will NOT be processed, unless there are special circumstances.
- ▶ For Region 8, it is possible to deduct from the claim a previously received advance, reimbursed airline ticket, etc. Use a “Miscellaneous” type, enter negative amount, describe in Comment, and give the code corresponding to the original purpose of the advance. Note, that the overall total of the claim must be positive.

Using Concur – starting

- ▶ Unfortunately, not available in all R8 countries due to OFAC restrictions
- ▶ How to log in
 - Go to ieee.org/expense, on the right-hand side of the screen, click the Orange button to Log in. Use your IEEE account and password. **Do not** go to concur.com
 - New users: if you do not have a Concur account, use the 2nd blue button to create one. Allow 24-36 hours for activation, you will receive an email. For many countries, you would also need to enroll with Western Union/Convera with your bank account details
- ▶ Concur app
 - Allows you to create, submit, approve reports directly on your mobile phone
 - Take a photo of your receipts with the app and Concur OCR will help auto-populate expense lines
 - Mobile app single-signon: **EDDB6G**

Access

Step 1: How to Get Started

Request an IEEE Account
(Skip if you have one)

Create Your Expense Reimbursement Account

Step 2: Access

Log In
(May require IEEE Network login)

Step 3:

Download the App

Using Concur – Tips 1

▶ Tips

- Next Gen Help on the lower right provides step-by-step walk-through guidance and documentation
- View self-service training at ieee.org/expense
- Be sure to review/update your profile settings and verify your email address
- Multiple ERPs can be used on a single report, but not recommended
- You have the option to email receipts to receipts@expenseit.com
Receipt images will upload into the user's Concur profile
- Check the status of your report by going to Report Details > Report Timeline
- Approvers can update ERP, but most likely they will return the claim to you
- Approvers can delegate other user to assist with approval, while out of office
- Apart from volunteer Approvers, there are also professional Auditors who scrutinize the claim and can return it

Using Concur – Tips 2

▶ Tips

- The transaction date entered in Concur MUST match the date on the receipt (the most frequent reason for returning the claim by Auditors)
- A missing receipt affidavit can be applied if a receipt is lost/damaged (not allowed for hotel, car rental or airfare expenses)
- A receipt is required for any purchase above \$25
- If you reside in a country where the local currency is USD, EUR, CAD or INR please enter your banking information into Concur. All other currencies require you to enroll in Western Union/Convera (one time enrollment)
- Concur automatically converts foreign currency transactions on your behalf (**Do not attempt to modify the default exchange rate**)
- If the conversion calculated by Concur differs from the conversion charged on your credit card, please submit a separate expense line for “currency exchange fees” to make your reimbursement whole.

Claiming Expenses From This Meeting

- R8 has Budget Codes in the format **XYZ0 Name**
- In Concur ERP Level 4 the above budget code is described as **XYZ Name (9.0X.XYZ)** for the current year, and **XYZ Name (9.10.XYZ)** for the previous year expenses
- For travel expenses for this meeting, the R8 Budget Code is 1020 and the ERP Level 4 is **102 R8 Cmte.Meeting Spring Travel (9.01.102)**

Expense Report Purpose Level 1 *	1	Expense Report Purpose Level 2 *	2
Regions X v		Eur. Mid. East Africa - Region 8 X v	
Expense Report Purpose Level 3 *	3	Expense Report Purpose Level 4 *	4
Eur. Mid. East Africa - Region 8 (R8) X v		102 R8 Cmte.Meeting Spring Travel (9.01.102) X v	

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 (www.ieee.org/start).
- New Member Orientation Webinars (www.ieee.org/start).
- Contact and support (www.ieee.org/about/contact_center/).
- Support center (<https://supportcenter.ieee.org>) – 24/5.

[Support Home](#)

[Answers \(FAQ\)](#)

[Submit A Question](#)

Most Popular Questions

[How do I renew my annual membership?](#)

[How can I make changes to my 2012 annual renewal invoice?](#)

[What are the advantages of using the new IEEE e-commerce platform?](#)

[Where do I go to recover my username and password if I forgot it?](#)

[How can I find out the status, and expected delivery of my publications to which I subscribed?](#)

[See all popular questions](#)

[How can I access the 2012 IEEE Special Interest Memberships and Subscriptions catalog for Professional or Student?](#)

[What are the changes to Xplore?](#)

[How do the new upgrades and enhancements affect myIEEE?](#)

[Why is IEEE upgrading its web sites and systems?](#)

[How do I register for an IEEE Web Account?](#)

[When can I expect to receive my Membership Card?](#)

[Can I change my web account information?](#)

Find Answers

Search



Support



Support

IEEE Contact Center



Live Chat

Chat with a member of our support team.



Give Feedback

How can IEEE make this site more useful for you?

Tips for Searching FAQs

Browse the **Popular Questions** section for the most current and

Some common acronyms 1

- 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

Some common acronyms 2

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

Some common acronyms 3

- 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
- SSR : Section Student Representative

Some common acronyms 4

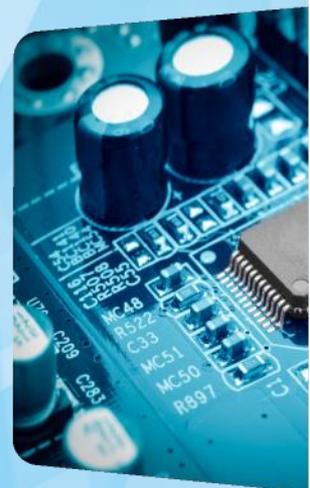
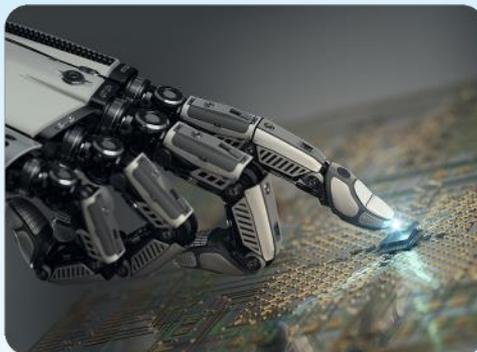
- STEM : Science, Technology, Engineering, Mathematics
- STEP : Student Transition and Elevation Partnership
- TAB : Technical Activities Board
- TCS : Technical Co-Sponsorship/ed
- TISP : Teacher In-Service Program
- VCF : Voluntary Contribution Fund
- VC : Vice Chair
- VP : Vice President
- WiE : Women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

- All Society (AES ... VT) and Council (BIO ... TM) acronyms

Questions? Thank you!

aluque@ieee.org





Questions?