How to Invite a Speaker
or The Big Roundup:
The Capture & Care of
Great Guest Speakers

• The Roundup (Choosing a speaker): Who does what & when
• Inviting a speaker: Successfully Capturing the Critter
• Caring for the Captured: Meeting essentials & best practices

2014 SFBAC Officer Training Session
January 25, 2014
Bill DeHope

Failing to Plan is Planning to Fail

• Have regular technical meetings
• Have regular planning meetings
• Create a 2014 calendar ASAP
• A 4-talk year can be done serially;
  more frequently needs parallel processing
  – Plan & Train in January
  – L-50 in February
  – 1st meeting in March
  – 2nd meeting in May
  – 3rd meeting in September w/ call for Nominations
  – 4th meeting in November w/ election
• This schedule allows planning the $n+1$st mtg at the $n$th mtg
• This schedule allows 2 months of Grid publicity
• Officers must know their duties and what’s expected
  – The Speaker Coordinator is the critical position—who is it in your world?
Suggested Local Chapter Officer Duties

- Treasurer
  - pay the bills, maintain the checkbook & finances
  - communicates performance-to-budget to other officers
  - track assets (cash-on-hand, computer eqpt, coffee pot…)
  - responsible for preparing next-year’s budget
  - provides yearly financial report to your Section for L-50

- Secretary
  - tracks meeting attendance, submits L-31
  - maintains a member/guest database (SAMIEEE, past attendees)
  - maintains “minutes”, Speakers List of past & potential speakers
  - assists VC in publicity; venue reservations

- Vice Chair/Speaker Coordinator (SC or VC)
  - invites, coordinates, and introduces technical speakers
  - back-up Chair (when Chair is absent, whether physically or...)

- Chair
  - responsible for a chapter meeting all IEEE requirements
  - calls & chairs meetings (sgt@arms) sets agendas, appoints committees
  - nags everyone to keep to The Plan (the Yearly Calendar & 61-day cycle)
  - Announces, runs, and reports a yearly election
  - the conduit to, and representative of, the Section

Choosing a speaker is the main purpose of Excom chapter planning meetings

- Don’t break the rhythm or your schedule is shot
- Keep and maintain a past & future speaker list
  - This is your chapter’s most important document
- The “future” part of the list should be prioritized
- Plan regularly. The actual success/failure of one meeting might influence who you invite to successive meetings
- Frequent planning meetings allow feedback/course correction to the speaker coordinator
  - You don’t want him burning bridges
  - You don’t want him developing his own agenda
- Updating the prioritization of the future speaker list is the main purpose of planning meetings.
- And adding in a new speaker or an idea for a speaker
  - (But don’t forget budgeting, workshops, outreach, succession planning, recognition etc. if you want an A+ chapter.)
Choosing a speaker:
What are your priorities?

- Who or what is a “draw”?
- Who is different?
  - Maintain a variety of disciplines
  - Maintain a variety of styles
- What feedback are you getting?
  - From regular attendees
  - From members
  - From other officers
- What do you want to learn?
- What would you like to see?
- Do all officers agree?
- Have a Plan B & Plan C
- Use your Speaker List!

Choosing a speaker:
Use tried-and-true speakers

- Who is recommended within your society?
- Who is recommended by neighboring chapters?
  - Benefits of a council!
- Scope out other local meetings!
  - Yes, not just your own society
- Who is recommended by colleagues?
- Ask your members (remember \( n_{\text{members}} >> n_{\text{officers}} \))
- Attend conferences in the field
  - Poster vs. oral speakers
- An IEEE “Distinguished Lecturer” ($ need not be a problem )
  - Be aware of local conferences to minimize/eliminate travel expense
- Share with neighboring section’s chapter
- Ask previous speakers (a form of complement!)
Who makes a good speaker?  
Think out of the box.

- A colleague or manager of an Excom member
- A past colleague or manager of an Excom member
- A competitor of an Excom member
- A local author of a popular conference’s paper (oral or poster)
- An Excom member (best to keep this as an ace up your sleeve)
- A previous speaker (but at least 3-year spacing)
- A local “applications engineer” (use with caution)
- Trade lists with another chapter; hold a joint meeting
- Everyone loves a tour! Pick the organization; find a speaker therein
- Yes, avoid dry speakers or those with annoying characteristics
- But knowledge trumps entertainment
- Knowledgeable speakers don’t all have PhD pedigrees

The key to a successful chapter are its meetings!  
Technical Meeting Basics

❤️  • Pick a speaker (and a Plan B or 2)
    - Excom planning task
❤️  • Invite a speaker/set a date
    - Good people skills, persuasive
    - Knowledgeable
• Find a location
• Publicize (get an audience)
• Meet!
• File meeting report form (L-31)

details to follow…
The Speaker Coordinator invites the Speaker

- **Recommended**: the Vice-Chair’s job
- **Use the telephone**
  - Email is too impersonal
  - Be sensitive to non-verbal cues
  - There will be negotiation of date, time
- **Introduce yourself by your IEEE title (YOU are impressive!)**
  - You are not selling or petitioning anything, you are presenting an opportunity
  - You are doing this person a favor, at the least giving him/her bragging rights
- **Get to the point** ("We’d like you to present your ABC conference paper to our local chapter in March…")
- **Be able to give the “elevator pitch” for IEEE, your society, your chapter**
- **Be sensitive (psychologically) to his first response**
  - Inadequacy: emphasize we want a basic review-level talk
  - Offer to control degree of audience questioning
  - This is “like a conference”
  - “This is an informal setting”
  - Importance: massage ego; emphasize value to him; drop names
  - Don’t volunteer your attendance numbers

Inviting the Speaker: the easier parts

- **Negotiate a date**
  - your coordinator should be given some “latitude” to do this
- **Explain the ground rules**: no advertising, be professional
  - same as an IEEE conference (people WILL take “notes”) but no copyright forms
- **Get an abstract & bio for publicity**
  - If resume is weak or non-existent, ask some basic questions
    - Make him look good...makes your chapter look good
    - How is he bringing his talk (USB stick, projector, Mac/Linux, slides…)
    - Are there any special requirements? (Physical limitations, diet, etc.)
- **I do NOT recommend asking for his slides at this point. (After the talk!)**
- **Is this a tour? A site visit? Any registration requirements?**
  - Citizenship? Advanced notice?
- **Follow-up**
  - to meet Grid deadlines
  - to ensure all systems “go” the week before meeting
The Plan in detail
(1) n = 1, 4

Do loop n = 1, 4

The Plan in detail
(1) n = 4, 1
### “Best Practices” Agenda for a Chapter Meeting

**Watch the clock!**

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

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

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### The Meeting: Introducing the speaker

- Informally introduce him/her to the other officers
- The formal intro is by the Speaker Coordinator
- Practice pronouncing his name well in advance
- Make his introduction “flow”
  - don’t read the abstract—**study** it beforehand
  - except to impress your audience with something esoteric
  - It’s nice to bring up something personal or shared—but now is no time for roasting
- Be Warm! Make him feel good about being here. He’s nervous too—more than you!
  - cover his credentials quickly
  - cover his present work deliberately—newbies will appreciate this
- Be sensitive to discomfort during the talk
  - Unwanted interruptions
  - Thirst?
- Err on the side of charity if he violates the professionalism rules
  - “recall what we discussed about not advertising”
Fielding questions

- Handle questions like a conference session chair:
  - “save your questions for after the talk” for all but quick clarifications
  - Unless the speaker seems to thrive on it
  - And progress is being made
  - As soon as he’s done, STAND UP and say, “Let’s thank our speaker”
  - Applaud!
  - “I believe we have time for some questions if our speaker is willing”
  - don’t ever let someone harangue your guest: “Let’s move on to another question”
  - come to your guest’s rescue: “Let’s take this offline in the interests of time”
  - Be fair in fielding questions but watch the clock—“one last question”
- YOU are chairing the session!
- If requesting an e-copy, do it afterwards, in private
  - Let someone in the audience ask the question

Thanking the speaker…

- Make sure his meal is free!
- Plaques—provide time for engraving
- Simple certificates are also nice…particularly if framed
- Mom was right: don’t forget a snail-mailed Thank-you
- IEEE giveaway goodies (best to get your Excom’s collective wisdom here)
- Some examples…

Custom engraved pens—a SF section idea
The Care & Feeding of Guest Speakers: A 1-slide Summary

- Start (or conclude) with an Excom planning meeting
- Choose the speaker wisely (with some backups)
- Invite the speaker (convincingly)
- Follow-up with the speaker (abstract & bio, reminder)
- Promote the speaker
- Properly introduce the speaker
- Thank the speaker
  - verbally
  - in kind
  - with a letter

Technical Meetings: Basic Questions with no wrong answers

- Excom Planning Meetings (where Choosing the Speaker gets done)
  - *before the TM? (least action)
  - *after the TM? (esp. if TM is a dinner mtg.)
  - separate from the TM? (for the well-oiled chapter)
  - electronically? (Recommended only if you have a prioritized list of speakers)

Where are the Technical Meetings?
  - *corporate locales, *colleges, public libraries, local restaurants,
  - ease-of-commute, nearness to commuter hubs, central location
  - The benefits of consistency!
  - avoid getting in a rut; choose 1 meeting per year outside of your box
  - Everyone loves an on-site tour (provide good directions)

- When are the Technical Meetings?
  - 6 pm (*right after work*; natural time for dinner meetings)
  - *7 pm (permits a burger stop beforehand; lighter traffic)
  - Noontime (weird, but works for some “close-knit” chapters)
  - Be aware of seasonal issues (popular conferences, holidays, summer, etc)

- Food at the Technical Meetings
  - *nothing? (least action; partic. for young chapters)
  - snacks? (marginally more work, limits venues?)
  - dinner? (for the well-oiled chapter; price break for IEEE members)
The Institute of Electrical & Electronics Engineers

Takes pleasure in presenting this certificate to

Dr. Michael D. Wright

For recognition of your contributions to the

Nuclear & Plasma Sciences Society

In appreciation of your presentation

Medical X-Ray Imaging With Amorphous Silicon Technology

Presented 12 May 2008

William J. DeHope, Chairman
IEEE/NPSS Oakland/East Bay Chapter

The Thanks shouldn’t end with the meeting...a follow-up letter is classy.

Lawrence Berkeley National Laboratory
Mail Stop: 80-101
Berkeley, CA 94720

Dear Dr. Feinberg

On behalf of the Nuclear and Plasma Society of the IEEE, let me thank you for your timely and informative presentation last Wednesday evening to our society's local chapter meeting. Your talk on LBL’s Advanced Light Source was extremely well received.

I’m sure I speak for all present when I express my appreciation for your explanation of both the accelerator and wiggler/undulator basics as well as the overview of current and planned experiments with this unique radiation source. Your talk was timely, well-organized, interesting, and at an approachable level to both specialists and novitiates. And, of course, your tour of the ALS facility will be remembered by all for a long time to come as the actual hardware was displayed and further discussed. My only regret was that the unseasonably hostile weather kept so many of our expected audience away. They missed an exceptional presentation and tour!

It is the selfless contributions of people like yourself that ensures our Society remains truly professional in nature and dedicated to the advancement and diffusion of nuclear and plasma physics.

Your time and efforts in preparation as well as presentation and tour are appreciated. Thank you.

Regards,

William J. DeHope
Vice Chairman and Speaker Coordinator
IEEE Nuclear and Plasma Society
Oakland/East Bay Chapter