Room B / Session B
Basics Training
(Particularly for New Officers)

- How to be a Chapter Chair
- How to be a Chapter Vice-Chair
- How to be a Chapter Treasurer
- How to be a Chapter Secretary

San Francisco Bay Area Council
Officer Training Workshop
January 27, 2018
Room B / Session B
How to be a Chapter Vice Chair
Bill DeHope

San Francisco Bay Area Council
Officer Training Workshop
January 27, 2018
• Chapters are the heart & soul of IEEE
• You have responsibilities to your Society
• You have responsibilities to your Section
• You have responsibilities to your local members
The Big Picture: Why be an IEEE Chapter Officer?

• Title looks good on a resume
• Meet new people, network, increase contacts
• Serve your profession; fulfill your duty
• Learn planning, negotiating, motivation/recruitment, team building…these things help YOUR career
• Path to other opportunities to serve
# The IEEE Chapter Offices in 1 slide

<table>
<thead>
<tr>
<th>The Office</th>
<th>Key Idea</th>
<th>Key Responsibility</th>
<th>Key IEEE doc produced</th>
<th>Key IEEE Tools</th>
<th>Key Goal</th>
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<tbody>
<tr>
<td>Chair</td>
<td>Vision</td>
<td>Succession</td>
<td>Officer Reporting (L-10) Compliance Docs</td>
<td>vTools Voting; Awards</td>
<td>A New 2019 Officer</td>
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<td>Vice-Chair</td>
<td>People</td>
<td>Speakers</td>
<td>E-Grid announcement</td>
<td>SamIEEE, eNotice</td>
<td>Well-attended Technical Meetings</td>
</tr>
<tr>
<td>Secretary</td>
<td>Words</td>
<td>“Speaker List”; website</td>
<td>Meeting Report (L-31)</td>
<td>vTools Events; vTools Web Hosting</td>
<td>Chapter Rebate</td>
</tr>
<tr>
<td>Treasurer</td>
<td>Numbers ($)</td>
<td>Concentration Banking acct.</td>
<td>Financial Reporting (L-50)</td>
<td>ieee.org/concentration</td>
<td>Early Bird Special</td>
</tr>
</tbody>
</table>

- Let’s talk about the Vice-Chair
IEEE chapter offices are a bit like business...

- **Treasurer**: Numbers. Counting the beans. Knowing the applicable rules.
- **Secretary**: Words. Recording the actions, writing the history, setting the tone.
- **Vice Chair**: People. Inviting (and motivating) the speakers, closing the deal.
- **Chair**: Vision. Planning and leading meetings (your product!) Motivating and finding volunteers, framing the future.
- A successful IEEE career covers all the organizational skills from Engineering, to Project Management, to Management Leadership, to Executive Administration.
Agenda for How 2B Vice Chair in 30 minutes

• An Overview of Chapter Meeting Basics
  – Its importance (who doesn’t like motherhood?)
  – *What* has to be done?
  – Division of labor: who does what?

• How do I get good speakers?

• How do I invite (entice) good speakers

• How do I function as my chapter’s “Technical Session Chair”
  – Properly introduce a speaker
  – Lead applause
  – Field questions
  – Thank the speaker

• Q&A
A Key Concept: The 3 Chapter Timescales

• The 4-year Cycle
  – Normal officer succession is Treasurer, Secretary, Vice Chair, Chair
  – Office terms are 13 months, with 1-month overlap for transition
  – Learn the job, do the job, teach the job, move up (in MGA or TAB)
  – No recycling, a 4-year commitment that helps everyone

• The 1-year Cycle
  – Officer Training, Officer Reporting, Annual Planning
  – Plan, Publicize, and Hold 4 technical talks
  – Represent your Chapter at the Section level
  – Accomplish other chapter goals
  – Recognize, Thank, and Recruit volunteers, esp. next year’s Treasurer

• The Meeting Cycle
  – Approx. two months in duration
  – A 4 mtg/year pace prevents overlap
  – Know who does what to make successful meetings happen
The local chapter Technical Meeting is our main product

- What sets us apart from APS, ASME, ACS...
- The only IEEE *technical product* for many members.
- The only IEEE *interface* (network) for many members.
- Free. No conference registration. No page charges.
- Makes people willing to pay dues.
- The LifeBlood of MGA
- The Speaker Coordinator is the engineer of this train
- The Vice Chair is the SC (in DeHope World)
- Most of this talk is about Technical Meetings and Speakers with a little at the end on being BackUp Chair or Chair-elect
What’s the secret of chapter success?

- The trick is **planning** your technical meetings (TM’s)
  - Play it safe: plan 2 before summer and 2 after
  - If you miss one (or both) you’ll still survive as a chapter
  - What follows is an “odd month” plan with January & July “off”
  - Note the events happen serially—no parallel processing!

- **January:** Outgoing Chair submits Officer Reporting
  *Five* officers attend Officer Training; ExCom Kickoff; approve annual budget/Plan, **plan 1st TM**

- **Early February:** Treasurer submits last year’s NS input to section/HQ

- **Mid-March:** 1st Technical Meeting ★
  plan 2nd meeting

- **Mid-May:** 2nd Technical Meeting ★
  plan 3rd meeting

- **Mid-September:** 3rd (penultimate) Technical Meeting ★
  discuss next year’s officers
  plan 4th meeting

- **Mid-November:** 4th (final) Technical Meeting ★
  Promote your election (and its volunteers!)
  Prepare a **Budget**/plan for new year

- **December:** Begin L-50 financial reporting
Technical Meetings: Basic Questions with no wrong answers
But you do have to answer them. Now!

- Excom Planning Meetings
  - *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)

- Food
  - *nothing? (least action; partic. for younger chapters)
  - snacks? (marginally more work, limits venues?)
  - dinner? (added $ hassles, give a price break for IEEE members)

- When?
  - 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)

- Where?
  - *corporate locales, *colleges, public libraries, govt labs, local restaurants,
  - ease-of-commute, nearness to commuter hubs, central location
  - avoid getting in a rut; choose 1 meeting per year outside of your box
  - Everyone loves an on-site tour (provide good directions)
  - Ask your Section for their “Preferred Venues” document
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
- Find a location
- Publicize (get an audience)
- Meet
- File Meeting Report

*details to follow...*
Choosing a speaker is the main purpose of Chapter planning (Excom) 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**
  - Don’t have one? Create one from historical L31 reports!
  - The Past Speakers section includes date, location, attendance (at end)
  - The “Next Meeting” part should be prioritized (Plan A,B,C) at top
  - The “Future Talks” part should be fat. Update for deaths, etc.

- If your list is long, could you do this just once a year?
  - 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 (Vice Chair)
    - 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.
  - But don’t overlook budgeting, workshops, outreach, succession planning, recognition etc.
The plan in detail  (a two-month cycle)

<table>
<thead>
<tr>
<th>TM</th>
<th>Task</th>
<th>Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>TM - 57</td>
<td>Arrange for next speaker. Request abstract and biography.</td>
<td>VC</td>
</tr>
<tr>
<td>TM - 48</td>
<td>Obtain &amp; edit abstract &amp; bio for a general technical audience. Forward to Secy.</td>
<td>VC</td>
</tr>
<tr>
<td>TM - 45</td>
<td>Electronically submit article to Grid editor</td>
<td>Secy</td>
</tr>
<tr>
<td>TM - 44</td>
<td>Update chapter webpage with Next Meeting info</td>
<td>Secy</td>
</tr>
<tr>
<td>TM - 43</td>
<td>Enter vTools and create/clone meeting</td>
<td>Secy</td>
</tr>
<tr>
<td>TM - 15</td>
<td>Create a flier (with map) for next meeting. Email announcement with flier attachment with request: Please Post.</td>
<td>Secy</td>
</tr>
<tr>
<td>TM - 12</td>
<td>E-notice submission for every chapter member.</td>
<td>Chair</td>
</tr>
<tr>
<td>TM - 7</td>
<td>Second email. Post fliers widely!</td>
<td>Secy</td>
</tr>
<tr>
<td>TM - 7</td>
<td>Log into CBRS and note balance. Any issues?</td>
<td>Treasurer</td>
</tr>
<tr>
<td>TM - 3</td>
<td>Speaker “reminder”. Prepare a verbal introduction of speaker for the upcoming meeting.</td>
<td>VC</td>
</tr>
<tr>
<td>TM - 1</td>
<td>Prepare an attendance sheet &amp; copies of previous minutes/SL for the upcoming meeting.</td>
<td>Secy</td>
</tr>
<tr>
<td>TM</td>
<td>Attend meeting; get everyone to sign attendance sheet; verify with a headcount. At Excom, distribute Speaker List &amp; previous minutes. Take notes (the next meeting minutes) and update Speaker List.</td>
<td>Secy</td>
</tr>
<tr>
<td>TM</td>
<td>Attend meeting; bring cookies &amp; Starbucks Travellers. At Excom, state CBRS balance.</td>
<td>Treasurer</td>
</tr>
<tr>
<td>TM</td>
<td>Attend and Chair mtg. Give IEEE pitch. Chair Excom.</td>
<td>Chair</td>
</tr>
<tr>
<td>TM</td>
<td>Attend meeting. Introduce speaker, field questions, thank speaker. Give floor back to Chair. Attend Excom; make sure you know Plan ABC.</td>
<td>VC</td>
</tr>
<tr>
<td>TM + 1</td>
<td>Submit attendance on-line L-31 via vTools.</td>
<td>Secy</td>
</tr>
<tr>
<td>TM + 1</td>
<td>Compose thank-you to speaker. Get input/approval of other board members as required.</td>
<td>VC</td>
</tr>
<tr>
<td>TM + 3</td>
<td>Mail out thank-you letter to speaker.</td>
<td>VC</td>
</tr>
<tr>
<td>TM + 3</td>
<td>Update e-mail list with new names. Write up minutes; get excom input.</td>
<td>Secy</td>
</tr>
</tbody>
</table>
Who makes a good speaker?

- A colleague or manager of an Excom member
- A competitor of an Excom member
- An Excom member (best to keep this 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 needn’t have PhD pedigrees
- But inform the “more practical” of the IEEE professionalism rules
Choosing a speaker: 
Tried-and-true approaches

- 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}} \gg 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 travel expense
- Share with neighboring chapters (we have a Council!)
- Ask previous speakers (a form of complement!)
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 (tour)?
• Do all officers agree?
• Have a Plan B & Plan C
• Use your Speaker List!
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 XYZ conference paper to our local chapter in March…”)
- Be able to give the “elevator pitch” for IEEE and your Society (and the role of your Chapter should it come up)
- Be sensitive (psychologically) to their first response
  - **Inadequacy:** emphasize we want a basic review-level talk
  - Offer to control degree of audience questioning
  - “This is an informal setting” vs. “This is like a conference”
  - **Importance:** massage ego; emphasize value to them; drop names
  - Don’t volunteer your attendance numbers
Inviting the Speaker: the “easy” parts

- Negotiate a date & time
  - 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
  - How is he bringing his talk (laptop, USB stick, projector, videos, slides…)
  - Are there any special requirements? (Physical limitations, diet, etc.)
- Is this a tour? A site visit? Any registration requirements?
  - Citizenship? Advanced notice?
- I do NOT recommend asking for his slides for your website at this point. (Wait until after the talk!)
- Follow-up
  - to meet Grid deadlines
  - to ensure all systems “go” the week before meeting
The Speaker Coordinator gets the speaker’s bio so is in the best position to do meeting publicity—contact Sandra for a Grid calendar item, e-Notice, e-mailing to prior attendees...
# "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)
Introducing us! The IEEE Pitch in Two Flavors

• A brief 2-slide intro (to follow) for use when time is short
  – late starts
  – Add slides for announcements (banquets, PACE needs/events, college activities, other chapter talks of mutual interest, …)
  – Introduce a “Gotta’ job/Wanna’ job” networking sessions

• An expanded 11-slide intro for use when time allows
  – at least once a year
  – let attendees know why they should be members
  – this can be run “in the background” before the “meeting” starts

• It’s great if a section rep does this; otherwise your Chair

• But remember basically why folks came—speaker intro. should begin within 30 minutes of start time.
Introducing the speaker

- Introduce him/her to the excom when he arrives
- The formal intro is typ. 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 no roasting
- Be Warm! Make him feel good about being here. He’s nervous too—probably 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 (Vice Chair/Speaker Coordinator) are chairing the “session”!
• If requesting an e-copy, do it afterwards, in private
  – But 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
- IEEE giveaway goodies (best to get your Excom’s collective wisdom here)
- Some examples...

*Custom engraved pens—a SF section idea*
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
Enough about meetings and *outside* speakers. How do I get *inside* volunteers?

- Don’t recycle your officers. Get new blood. 4&go
- Stagnant things die. Movement means life.
- Your Chair should be taking you to Section meetings. You should be getting a more global view of IEEE.
- You should be Chapter Chair next year!
- Your Chair should be pursuing other activities next year. Encourage them to “move up” to a Section jobs or start a new Chapter or entity.
- They’re not? Encourage hobbies, ask them about the kids…
- “Make room for others!”
- IEEE doesn’t exist to nurture fragile egos.
Help your Secretary with SamIEEE duties

- There’s more here than jumping to “Catalog”
The Care and Feeding of Guest Speakers
(summary slide for Speaker Coordinator duties)

- 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
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