

IEEE Central Texas Section Workshop Policy and Procedures

CTS (MGA) Workshop Policy (hereinafter referred to as "CWP")

Policy:

- CTS Workshops are defined as events under \$25,000 of revenue such as symposia, small conferences, colloquia, and training classes in which CTS is the sole financial sponsor.
- CTS Workshops and like events should generally follow the procedures in Section 10.0 of the MGA Operations Manual and the **CWP** as applicable.
- Patronage is allowed and encouraged. A Patron is defined as an individual, organization, or entity that contributes financially or otherwise to the CTS Workshop but bears no responsibility for any loss and expects no share of any surplus.
- If a CTS sub-unit has financial participation in a event as defined above then CTS is the financial sponsor.
- CTS Workshop Organizing Committees (OC) should work to increase member participation in IEEE events as defined above.
- Any event using the IEEE Brand, other than a chapter meeting, that charges a fee for attending and / or incurs expenses to the IEEE (including CTS) must obtain preauthorization per the **CWP** before that event is authorized and supported by CTS.
- Events, as defined above, that charge an attendance fee shall budget for a minimum of 20% surplus . All CTS events covered by this policy should not budget for a loss.
- All events must adhere to title and logo policy found in paragraph 10.1.16 and 10.1.17 of the IEEE policy manual.
- All events which charge an attendance fee shall give preferential pricing to IEEE members per the IEEE policy for member discounts found in paragraph 10.1.15.
- The preauthorization process refers to the sequence of signatures in following form along with a Proposal and Budget.

Name of Event:	IEEE
Date/Time of Event:	
Date of this Request:	
Organizing Entity:	
Proposal (attach):	
Budget (attach):	
**Chair of Event & Contact Info	
Chair's signature, date & member number	
**CTS Conf Coordinator Signature	
**CTS Treasurer's Signature	
CTS Chair's signature approving event	
Distribution:	Original to Treasurer, Copy to those ID'd by **

** See attachments A, B & C for example of FORM, PROPOSAL and BUDGET.

Attachment A

IEEE Central Texas Section Conference Guidelines and Procedures

EXAMPLE FORM

Name of Event:	IEEE CTCN Career Management Workshop – Manage Your Career – Don’t Get Blindsided by Reality
Date/Time of Event:	Wednesday, August 28, 2013
Date of this Request:	June 3, 2013
Organizing Entity:	CTCN
Proposal(attach):	Proposal with budget attached.
Budget (attach):	Proposal with budget attached.
**Chair of Event & Contact Info	Bill Martino (bill.martino@ieee.org)
Chair's signature, date & member number	
**CTS Conf Coordinator Signature recommending approval	
**CTS Treasurer's Signature recommending approval	
CTS Chair's signature approving event	
Distribution:	Original to Treasurer, Copy to those ID'd by **

Attachment B
Proposal Example

2013CTCN Career Management Workshop Proposal

**“Manage Your Career – Don’t Get Blindsided by Reality:
• an IEEE Workshop”**

hosted by: CTCN

Co-sponsored by: TMC, CAS/SSC, CEDA, COMSOC/SP, and WIE

Contents:

I. Workshop Profile-

II. Workshop Strategy-

III. Workshop Outline-

IV. Registration Fee-

V. Budget

Attachment B

Proposal Example

I. Workshop Profile

Title: Manage Your Career – Don't Get Blindsided by Reality

Workshop Date: August 28, 2013

Workshop Location: Building-A Auditorium in the business park at, 7700 West Parmer Lane, Austin, TX

Workshop Projected Attendance: 40 – 60 attendees

Objectives:

The objective of this workshop is to increase attendee's awareness of the unintended consequences of change, to expect the unexpected, and to provide motivation to proactively execute career goals.

Format:

Half day workshop with five speakers, each covering a separate area of career management in an era of rapidly changing job markets.

II. Workshop Organizing Strategy

Based on past successful workshops, the proposed organizing strategy is outlined below:

- Workshop Committee composed of CTCN Leadership Team, assisted by co-sponsor chapter chairs
- Identify subject and speakers based on assessment of member interest. [Complete]
- Seek co-sponsors [Complete – TMC, CEDA, CAS/SSC, WIE, COMSOC/SP]
- Seek patronage
- Identify a facility to meet our date expected attendance [Complete]
- Contact speakers and lock in a date. [Complete]
- Arrange meetings to discuss workshop and action items [ongoing]
- Obtain formal/Official approval to have workshop from CTS
- Begin Registration utilizing V-Tools
- Advertise Workshop at monthly technical meetings and via e-mail distribution lists
- Coordinate/communicate with speaker, facilities, and attendees as workshop approaches
- After workshop meet to discuss pros and cons from attendee and sponsor survey
- Submit final financial report for workshop to CTS

Attachment B

Proposal Example

III. Workshop Outline

1:00 – 1:20 : Registration and Networking
1:20 – 1:30 : Co-sponsor Chapter Promotions
Fawzi Behmann, Leslie Martinich, and Zhuo Li
1:30 – 1:35 : Opening Welcome –
Bill Martino
1:35 -- 2:25 : Vision on Technology and Job future –
David Smith, Futurist & CEO
2:25 – 3:15 : What is your career plan and your ideal job? –
Tommy Chiodo, Career Coach
3:15 – 4:05 : Empowered Productivity
Maura Thomas, Productivity
4:05 – 4:20 : Break & Networking
4:20 – 5:10 : Build your brand and get ready for change –
David Hughen, HR Consultant
5:10 – 6:00 : Career life cycle and design; Second Spring –
Marc Miller, Career Coach
6:00 – 6:30 : Network & Cleanup

IV.

Advance Registration Fee (August 23rd cutoff)

Walk-in Registration Fee

IEEE Members		\$20.00	-----	IEEE Members	\$30.00
Non IEEE Members		\$25.00	-----	Non IEEE- Members	\$35.00
IEEE Student Members		Free	-----	IEEE Student Members	Free
IEEE Life Members		Free	-----	IEEE Life Members	Free

All fees paid via PayPal or Check payable to IEEE-CTS; Refunds available for a fee and refund by CTS via check. All refund/cancellation requests must be provided in writing and received by Friday, 23 August 2013. There will be an administrative fee of 20% deducted from each refund. Please submit all refund/cancellation requests to: rjbakeratx@austin.rr.com.

**Attachment C
Budget Example**

V. Budget

Two plans are presented here. Plan A anticipates a \$500 subsidy from one of the co-sponsor chapters (currently being pursued). If the subsidy is secured it will be used to improve the snack selection and to purchase token gifts for the speakers. Plan B has no subsidy. Both meet the 20% surplus criteria.

Plan A (Subsidized):

Plan A Revenue:

	Scenario		
	A	B	C
Member Attendance Advance Registration	26	28	30
Member Attendance Walk-in	3	4	5
Non-member Attendance Advance Registration	7	8	9
Non-member Attendance Walk-in	4	5	6
Total paying attendees	40	45	50
Speakers and Staff	13	13	13
Total Attendees	53	58	63
Member Advance Registration Fee	\$ 20.00	\$ 20.00	\$ 20.00
Member Walk-in Fee	\$ 30.00	\$ 30.00	\$ 30.00
Non-member Advance Registration Fee	\$ 25.00	\$ 25.00	\$ 25.00
Non-member Walk-in Fee	\$ 35.00	\$ 35.00	\$ 35.00
Co-sponsoring chapter subsidy	\$ 500.00	\$ 500.00	\$ 500.00
Total Revenue	\$ 1,425.00	\$ 1,555.00	\$ 1,685.00

Notes: 1) Speakers and Staff not included in revenue projection.

2) Based on previous workshops student and life member attendances are low and will not significantly affect revenue projections.

Plan A Expenses:

	Scenario		
	A	B	C
Drinks and snacks for attendees plus 5 Speakers, 5 CTCN Officers, and 3 Co-sponsor Officers	\$477.00	\$540.00	\$587.00
Gift cards for speakers @ \$50 each	\$250.00	\$250.00	\$250.00
Dinner for 5 Speakers, 5 CTCN Officers, and 3 Co-sponsor Officers	\$455.00	\$455.00	\$455.00
Total Expenses	\$1,182.00	\$1,245.00	\$1,292.00

Plan A Final Results:

	Scenario		
	A	B	C
Revenue	\$1,425.00	\$1,555.00	\$1,685.00
Expense	\$1,182.00	\$1,245.00	\$1,292.00
Surplus	\$243.00	\$310.00	\$393.00
Surplus Percent of Expense	21%	25%	30%

Note: In the event of low attendance (Scenario A) drink and snack expense will be reduced to \$9 per attendee so that the budgeted surplus is >20% of expense. Scenarios B and C budget \$9.31 per attendee for drinks and snacks.

**Attachment C
Budget Example**

Plan B (without subsidy):

Plan B Revenue:

	Scenario		
	A	B	C
Member Attendance Advance Registration	26	28	30
Member Attendance Walk-in	3	4	5
Non-member Attendance Advance Registration	7	8	9
Non-member Attendance Walk-in	4	5	6
Total paying attendees	40	45	50
Speakers and Staff	13	13	13
Total Attendees	53	58	63
Member Advance Registration Fee	\$ 20.00	\$ 20.00	\$ 20.00
Member Walk-in Fee	\$ 30.00	\$ 30.00	\$ 30.00
Non-member Advance Registration Fee	\$ 25.00	\$ 25.00	\$ 25.00
Non-member Walk-in Fee	\$ 35.00	\$ 35.00	\$ 35.00
Total Revenue	\$ 925.00	\$ 1,055.00	\$ 1,185.00

Notes: 1) Speakers and Staff not included in revenue projection.

2) Based on previous workshops student and life member attendances are low and will not significantly affect revenue projections.

Plan B Expenses:

	Scenario		
	A	B	C
Drinks and snacks for attendees plus 5 Speakers, 5 CTCN Officers, and 3 Co-sponsor Officers	\$265.00	\$290.00	\$315.00
Dinner for 5 Speakers, 5 CTCN Officers, and 3 Co-sponsor Officers	\$455.00	\$455.00	\$455.00
Total Expenses	\$720.00	\$745.00	\$770.00

Plan B Final Resu

	Scenario		
	A	B	C
Revenue	\$925.00	\$1,055.00	\$1,185.00
Expense	\$720.00	\$745.00	\$770.00
Surplus	\$205.00	\$310.00	\$415.00
Surplus Percent of Expense	28%	42%	54%