

Region 3 Strategic Planning 2006 -2007

28-29 January 2006
Atlanta, GA



Workflow

28 January 2006

- | **Morning**

- | **Discuss Retreat SWOT**

- | **Discuss Retreat Initiatives**

- | **Formulate 1-3 Additional Initiatives**

- | **Lunch**

Workflow

28 January 2006

- | **Afternoon**

 - R3 Committee Meetings**

 - | **What Projects are needed to accomplish the R3 Initiatives? Project Manage – Team, Time Frame**
 - | **Other Committee Business, Issues....**

- | **Dinner**

- | **Evening (7:30 - ?????)**

 - | **SPC Meeting**
 - | **Communications Committee**
 - | **???**

Workflow

29 January 2006

| 8:00 – 11:00

R3 Committee Reports

- | What Projects are needed to accomplish the R3 Initiatives? Project Manage – Team, Time Frame**
- | Other Committee Business, Issues....**
- | Lunch (for those staying this afternoon)**
- | Conference Committee (SeCon 2006)**

R3 Planning Agenda

- | **Discuss Results of SWOT**
- | **Discuss Objectives**
- | **Discuss Initiative –**
 - | **Improved Use of Awards**
 - | **R3 Help Desk (Ask R3)**
- | **Formulate Additional Initiatives**

Results of S.W.O.T Analysis

Items in **green** were added by the ExCom 1/25/2006

Strengths

1. **Innovation**
 - | Fresh Ideas
 - | Welcoming & Inviting New People to Participate
 - | Diversity of Perspective Backgrounds
 - | New Initiatives that lead to IEEE capabilities
2. **Longevity**
 - | Volunteers
 - | Membership
3. **Organizational Brilliance**
 - Council Structure
 - Awards
 - | Well Documented Awards Process
 - | Anniversary Banners and History
 - Communications Processes
4. **Financial Support by Membership**
5. **Spouse Support**
6. **Strong Communities of Interest**

Weaknesses

1. Usage of Capability

- | Communications Tools
- | Leadership Development Training
- | Mentoring
- | Geographic Roster
- | Networking
- | Awards Programs
 - | Participation in Process
 - | Preparation of Packages
 - | Publicity
- | Conference Lessons Learned
- | SSVR
- | Volunteer Recruitment Toolkit
- | IEEE Financial Advantage
- | Professional Development Credits

2. Publicity

- | Public Image
- | Engineering outreach

3. Recruitment of Volunteers

- | Lack of succession planning
- | No formal method of recruitment

4. Project Management

- | Not moving past concept or pilot
- | Follow through to completion
- | Lack of progress reporting

5. Continuing Education

- | Availability through IEEE
- | Member awareness
- | Costs to member
- | Competition

6. Area Structure

- | Lack of section buy in
- | Chair Appointment vs. Election

7. Weak Sections

Opportunities

- | **Recognize Industry /University /Government Contributions**
- | **Exploiting Flat World Reality**
 - | **Sister Sections**
- | **IEEE Mentoring Program (Pilot)**
- | **Enterprise Sales**
- | **Graduate Student Member Grade**
- | **Increased Membership Focus by RAB and IEEE-USA**
- | **Education Products for Sections by EAB**

Threats

- | **Additional Cost of Services to Members**
- | **Culture of Not Volunteering Unless It Reflects Directly to Bottom Line**
- | **Government Restrictions to Information Exchange**
 - | Broadening of ITAR
 - | International restrictions
 - | Personal interactions
 - | Intellectual property restrictions
- | **Changing Business Environments that will affect Employment and Retirement Security**
- | **Competing Technical Societies**
 - | Time
 - | Money
- | **Changing Revenue Stream of IEEE**
 - | Sales of intellectual property to business
- | **Pay by the drink IEEE business model**

Objectives for 2006-07

Objective - 1

Improve use of existing capabilities

- | **Create R3 Help Desk**
- | **Communications Tools**
- | **Leadership Development Training**
- | **Mentoring**
- | **Geographic Roster**
- | **Networking**
- | **Awards Programs**
 - | Participation in Process
 - | Preparation of Packages
 - | Publicity
- | **Conference Lessons Learned**
- | **SSVR**
- | **Volunteer Recruitment Toolkit**
- | **Enterprise Sales**
- | **IEEE Continuing Education for Members**
 - | Availability through IEEE
 - | Member awareness
 - | Costs to member
- | **Harris Database**

Objective - 2

Engineer Region 3 Organization and Operations

- | **Project Management**
 - | Not moving past concept or pilot
 - | Follow through to completion
 - | Lack of progress reporting
- | **Recruitment of Volunteers**
 - | Lack of succession planning
 - | No formal method of recruitment
 - | Promote Graduate Student Member Grade
- | **Area Structure**
 - | Lack of section buy in
 - | Chair Appointment vs. Election
- | **Weak Sections**
- | **Publicity**
 - | Public Image
 - | Engineering outreach
- | **Link to IEEE Initiatives and Pilot Projects**
 - | Mentoring
 - | Collaboration

Objective - 3

Enhance Member and Employer Relations

- Increase IEEE relevance to employers initially through a concentrated effort to involve Engineering Managers as members / volunteers**

Objective -4

Embrace Flat World Reality

- | **Develop programs to encourage transnational exchanges.**
 - | **Examples**
 - | **Sibling section program**
 - | **Linking to study abroad programs**

R3 Initiatives 2006

1. **Improve use of existing capabilities
R3 Awards and Recognition**
2. **Engineer Region 3 Organization and Operations
- R3 Help Desk**
3. **Knowledge Capture and Document Management**
4. **Enhance Volunteer Recruitment**
5. **Leadership by Developing Others**
6. **Membership Initiative**
7. **Teacher In-Service Initiative**
8. **Embrace Flat World Reality**
9. **Enhance R3 Capability to Increase Income**

Initiative - 1

Improve use R3 Awards and Recognition

REGION 3 STRATEGIC PLANNING FORM FOR YEAR 2006

Name of Section, Committee or Office: R3 Awards and Recognition Committee

Member Reporting Date: Mary Ellen Randall

Position/Office: Chair

MISSION STATEMENT: Improve use of existing capabilities – R3 Awards and Recognition

RESPONSIBILITIES/DESCRIPTION OF OFFICE: Initiative Champion

Initiative – 1 (continued)

1. Statement: Increase the participation in the awards process

Region Goal Supported:

Plan: Assign Team NOW. Initial Plan Reported at SoutheastCon and Detailed Implementation Plan completed by end of August, Implement 2007 Actions by November 2006

- Cheat sheet or short course on awards**
- Consider Engineering Management Award, Team awards, Paper prize for professionals**
- Consider Section related awards, newsletter, web site**
- Keep submissions for possible reuse**
- Fill out the region awards committee, vice chair, area/council chairs, professional activities chair**

Metric: Status reports as described above.

Initiative – 1 (continued)

2. Statement: Preparation

Region Goal Supported:

Plan: Assign Team NOW. Initial Plan Reported at SoutheastCon and Detailed Implementation Plan completed by end of August, Implement 2007 Actions by November 2006

- Present awards at an appropriate venue**
- Get fellow information for field awards**
- Copy the nominators in tough competitions and recommend resubmission**
- Feedback to submitters when appropriate**
- Automated submission, peer review and press release generation**
- Use superlative wording in submissions, provide examples or scope of contributions**

Metric: Status reports as described above.

Initiative – 1 (continued)

3. Statement: Publicity

Region Goal Supported:

Plan: Assign Team NOW. Initial Plan Reported at SoutheastCon and Detailed Implementation Plan completed by end of August, Implement 2007 Actions by November 2006

- Email announcements to student branch counselors, section awards chairs, council and section excom, and membership development chair**
- Announce and promote in section newsletter and tell about the winners**
- Update the list of past winners**
- Describe value of awards to sections**
- Increase awareness of individual's professional activities and contribution at section and individual level**

Initiative – 1 (continued)

3. Statement: Publicity (continued)

- Increase employer knowledge of award value and process**
- Advise engineering management of winners in their companies, if information is released.**
- Publicize the winners in appropriate newsletters and publications.**

Metric: Status reports as described above.

R3 PM: Mary Ellen Randall

Initiative - 2

Engineer Region 3 - Help Desk

Name of Section, Committee or Office: Planning Retreat Working Group

Member Reporting Date: 27-Jan 2006

Position/Office: N/A

MISSION STATEMENT: To create a volunteer 'helpdesk' that is widely advertised and easily accessed through a web-based FAQ and email alias. This helpdesk will respond to specific requests for information and help from the volunteers in Region 3.

Initiative – 2 (continued)

1. Statement: IEEE Volunteers routinely struggle to find and access information and resources needed to support their role. The IEEE is a large and decentralized organization with multiple units sharing responsibility for, or stake-holder interest in, the institute's operations. Thus, important information needed by the volunteer, even when information is available, is generally difficult to find and/or contradictory in its content.

Region 3 can help its volunteer community better fill their roles by delivering a need-based information service that addresses the specific needs and interests of its volunteers.

Region Goal Supported: “Increase membership through growth, retention, leadership development: Leadership Development”

Initiative – 2 (continued)

Plan:

Region 3 will create a volunteer-support committee to maintain the helpdesk; the helpdesk will:

- serve as an information conduit, helping volunteers find and access existing resources
- where necessary, augment those resources with customized region support
- when appropriate, serve an ‘ombudsman’ role to help volunteers resolve problems between Region 3 units and other units of the institute

The committee will create a website (<http://ewh.ieee.org/reg/3/askR3>) with questions/answers to frequently-requested and operationally-important information for volunteers

Initiative – 2 (continued)

Plan:

- the information will cover all topics appropriate to Region 3 volunteers, but will avoid duplication of material as much as possible
- the information on the website will undergo complete review annually for accuracy and continuing relevance

Region 3 will create and advertise an email alias called 'askR3@ieee.org' that any volunteer in region 3 can use to ask any IEEE-related question

- submissions to the alias will be sent to all committee members
- a specific reply to each request will be sent, based on the information collected

Initiative – 2 (continued)

Plan:

A new committee will be formed at the Region 3 ExCom meeting in January 2006. That committee will create a prototype website before SoutheastCon 2006. During the development of that website the committee will contact all of the current region-level volunteers and ask them for candidate issues to be addressed. If approved in its prototype form the invitation to submit questions or answers will be issued to all volunteers in Region 3.

R3 PM: Bill Marshall

Initiative - 3

Knowledge Capture and Document Management

Recommendation: IEEE shall institute standards for capturing / archiving the collective knowledge and wisdom of the past, current and future leaders of the IEEE. From this, the IEEE shall develop and package educational and training material and "how-to" guidance for tutorials and workshops, for sections and chapters. Pilot programs by 2Q07.

Region 3 shall directly support this development.

R3 PM: Charles Lord

Initiative - 4

Enhance Volunteer Recruitment

- | Enhance R3 Succession Planning Process for Volunteers and improve involvement of Sections**
- | Structure job to fit volunteers' time**
- | Express appreciation for job completion, encourage trying another one**
- | Provide mentoring, section-level training**
- | Making it a pleasant experience encourages repeat performances**

Initiative – 4 (continued)

Enhance Volunteer Recruitment Initiative

- | “Elevator speech” at meeting
- | Introduce other section/chapter members – reach out – make them feel comfortable
- | Have job descriptions to be filled
- | Contact through meeting sign-in sheets
- | Personal contact – face-to-face contacts and phone calls best
- | Increase awareness of existing recruiting capabilities like the [Volunteer Toolkit](#)

R3 PM – George McClure, Bill Ratcliff

Initiative - 5

Leadership by Developing Others

- Continue LDO migration to Sections**

R3 PM: Richard Riddle

Initiative - 6

Membership Initiative

Name of Section, Committee or Office: R3 Membership
Development Committee

Member Reporting Date: 28-Jan 2006

Position/Office: N/A

MISSION STATEMENT: Increase overall Membership in
Region 3 by 5% in 2006 from a base of 31,576.

RESPONSIBILITIES/DESCRIPTION OF OFFICE:

2006/2007 GOALS

1. Statement: The IEEE is facing a challenge as overall Membership has declined in recent years. Region 3 has experienced a similar decline in its total of active higher level Members and Student Members.

Region Goal Supported: “Increase Membership through growth, retention and promotion of Membership value.”

Initiative – 6 (continued)

Plan:

Region 3 will increase its Membership total by 5% during 2006 by the development and execution of selected activities:

develop a detailed plan that will coordinates the activities of the Region 3 Membership team

build, train and coordinate a Region 3 wide Membership sales team that is based on a MD Chair in every Section.

work with both IEEE and Region 3 entities to develop and document Membership benefits that promote the value of Membership.

support a communications plan that will promote the value of Membership to every Region 3 Member and ask for their support in the 2006 Membership plan.

Initiative – 6 (continued)

Plan: (continued)

coordinate with other IEEE Membership functions to avoid duplication and promote synchronization during the execution of the Region 3 2006 Membership development project.

Metric:

Increase overall Membership in Region 3 by 5% in 2006 from a base of 31,576.

Increase IEEE relevance to employers initially through a concentrated effort to involve Engineering Managers as members / volunteers

R3 PM: Lee Stogner

Initiative - 7

Teacher In-Service Initiative

**Extend the the initial Section Training
Pilot to additional Sections in 2006**

R3 PM: Pat Donohoe

Initiative - 8

Embrace Flat World Reality

- | **Develop programs to encourage transnational exchanges.**
 - | **Examples**
 - | **Sibling section program**
 - | **Linking to study abroad programs**

R3 PM: Bob Duggan

Initiative - 9
Enhance R3 Capability to Increase Income

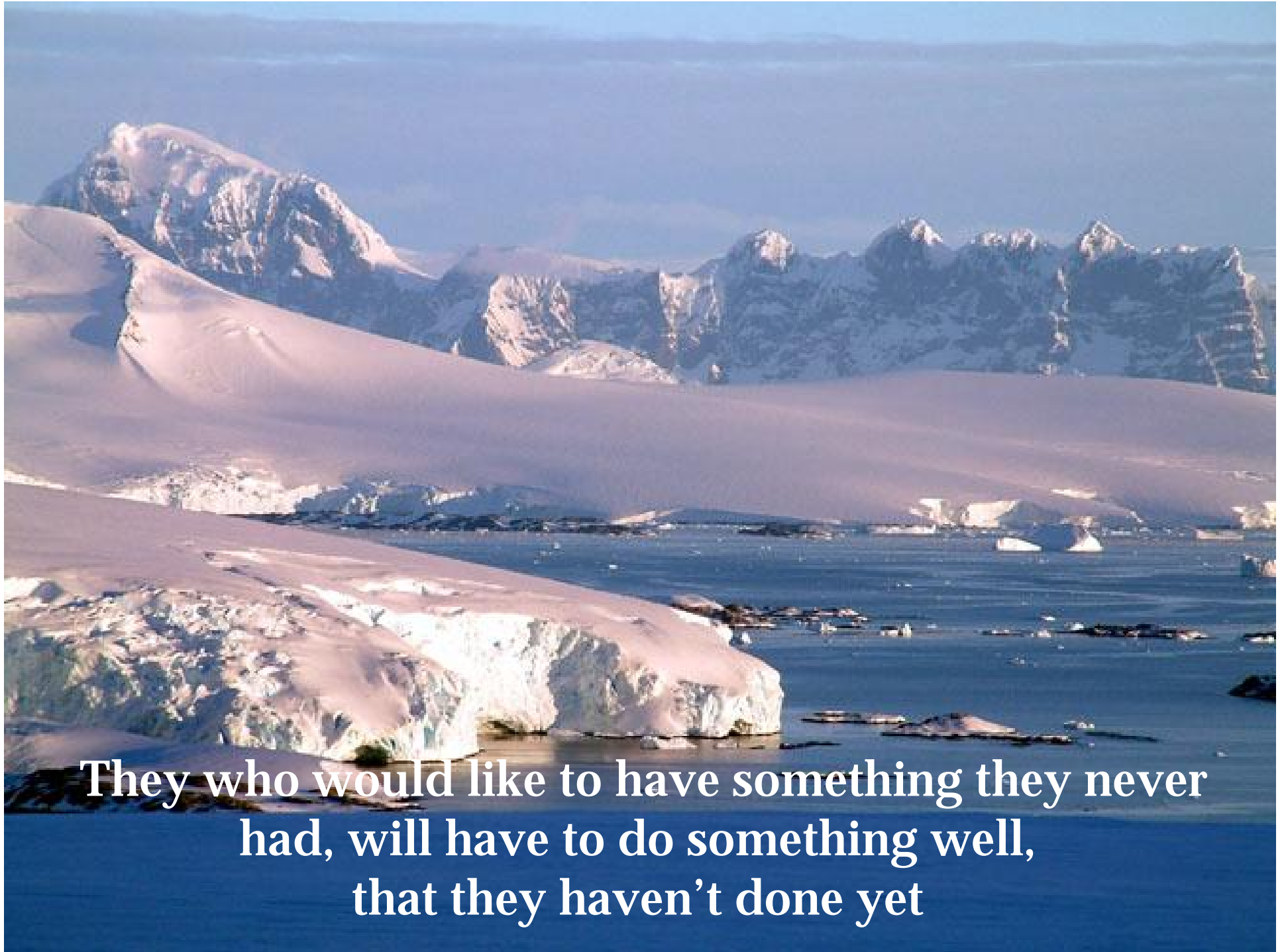
- Actively pursue additional sources of income for Region 3**

R3 PM: R3 Finance Committee

Observations...

A detailed oil painting of a waterfall cascading down a layered rock cliff. The water is depicted with soft, white, and light blue brushstrokes, creating a sense of movement and mist. The rock face is rendered with various shades of brown, tan, and ochre, showing distinct horizontal geological strata. The background is a clear, deep blue sky. The overall style is realistic with visible painterly textures.

**The more precisely you
plan, the harder destiny
will hit you**



They who would like to have something they never had, will have to do something well, that they haven't done yet



**Plan for tomorrow but
LIVE for today**



**Life is
drawing
without an eraser**

Thank you...

For your ...

Dedication...

Creativity....

Sense of Humor...

During the Region 3 Planning Weekend!