

# **IEEE Center for Leadership Excellence**

**Region 3 Meeting  
20 March 2010**

**Charles Lord**

# What do I do in IEEE?

- Region 3 Leadership Development and Regional Support Chair
- Region 3 Archive Chair
- NC Council Educational Activities Chair
- Eastern NC Section PACE Chair
- Eastern NC Section Embedded Systems SIG Chair
- MGA vTools Project Committee
- IEEE Center for Leadership Excellence Committee
- IEEE SoutheastCon 2010 Registration Chair
- Etc etc etc etc





# No matter how many hats...

- You are ALL very important people!
- You are volunteers
- You are engaged (involved, active)
- YOU ARE MEMBERS!



# Historical Perspective

- Many of us, particularly in the past, were handed that BOX
- In the pre-Internet days, we developed “Leadership Training” to teach how to fill out forms and who to call.. (anyone remember the 3” binders?)

*“But What Do I Do?”*

# ***Leadership in Leadership Training***

- In the mid-90's, a select few realized two important facts:
  - With the Internet, reports can become electronic, and “easier” (can be trained over the Internet?)
  - There is a real need to teach leadership, not just ‘middle management’ to our volunteer leaders



# ***Leadership in Leadership Training***

- Projects were started to begin developing leadership training modules to teach both “IEEE Skills” and leadership (prof development)
- A few took these tools and made great use of them, but offerings world-wide varied greatly
- SC05, SC08 “hot topics”

# ***Excellence in Leadership Training***

- In parallel with the transition of Regional Activities to Member and Geographical Activities, it was recognized that there needed to be a unified, consistent source of high-quality, easy to find training for our diverse volunteer base; this needs to cover both the “IEEE Skills” and professional / leadership skills.



*“IEEE Volunteerism is the Best Kept Secret as a top ‘management school’ for Engineers and Technical Management”*

*“My Vision is for the IEEE to be recognized by Industry, Academia, the Profession, and the Public as the Premier Source of technical leaders”*

# IEEE Center for Leadership Excellence

- Project / Ad-hoc Committee in 2009 under MGA Operations; continues under MGA as project manager, but intended for ALL of IEEE. John Reinert is Chair.
- Developing training for all levels of IEEE volunteers, began at the section / chapter level (closest to the Member)

# IEEE Center for Leadership Excellence

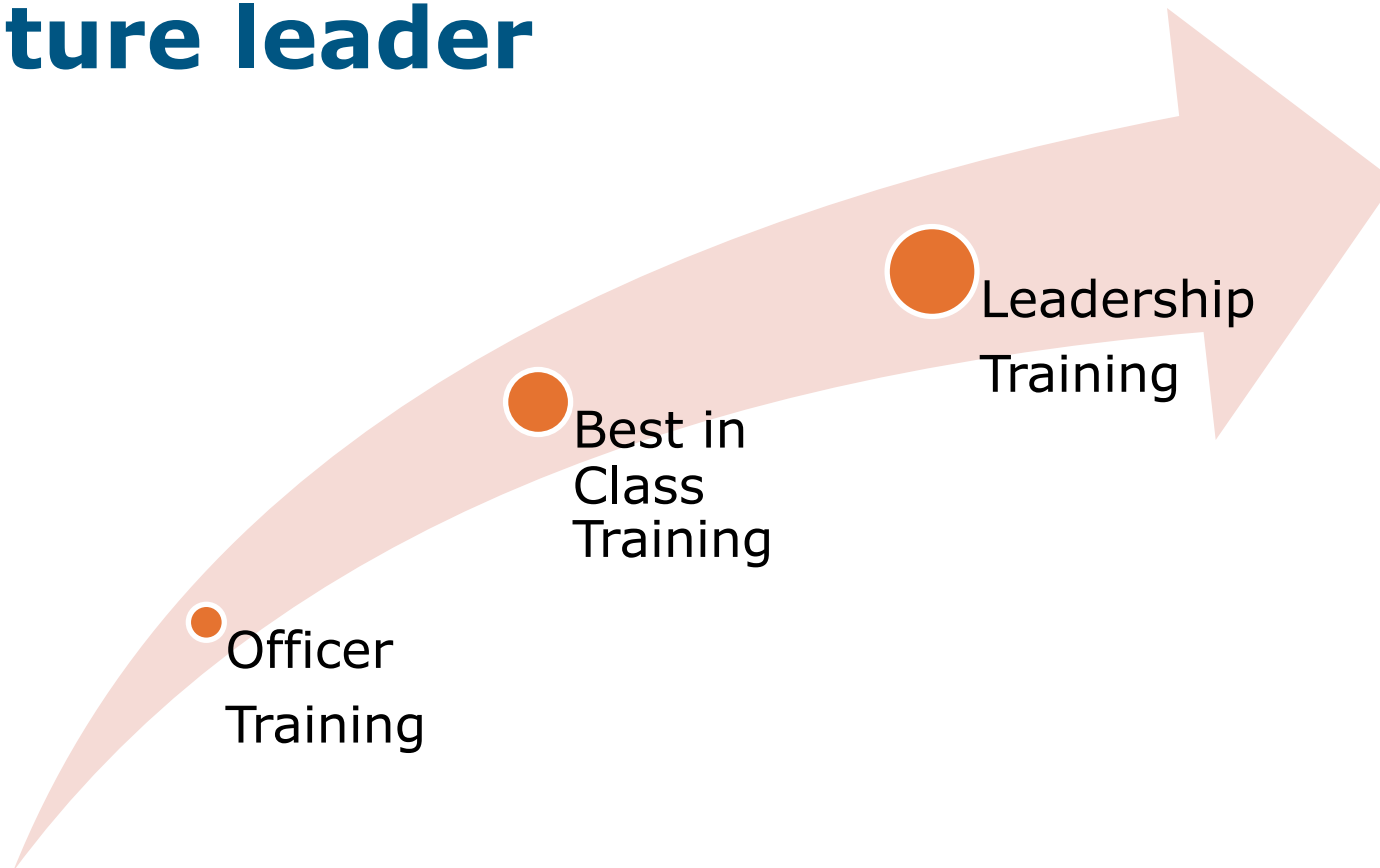
## ■ Four phases:

- Web / email – based “quick start” for the first 30 days of office
- More advanced “rest of the story” material for individual: web or class
- Individualized modules in valuable skills and knowledge (comms, leadership, etc)
- Modules designed for teaching leadership skills to the general membership (can you say “MPAC”?)

# The IEEE Center for Leadership Excellence (CLE) Delivers on the Promise

- ❑ Sections Congress Recommendations – “Officer Training Handbook...”
- ❑ MGA Vision
  - “Ensure Quality Member Opportunities through Continuous Engagement”
- ❑ Provide members a path forward to develop and grow as future leaders in both IEEE and their professional career

# The CLE framework develops the member as a volunteer and future leader



# Quick Start Training is the First Major Deliverable to this Goal

Quick Start consists of individual modules for five section officer positions:



- Quick Start was developed to provide new officers with everything they need to know in the first 30 days in their role.
- ❑ Quick Start is available on the web and is self paced, requiring 30 to 45 minutes to complete.
- ❑ Pilots were run prior to release for each module with section officer participants across all regions.
- ❑ Quick Start was released on 1<sup>st</sup> October 2009.

# CLE Ad Hoc Committee Laid the Initial Groundwork

- ❑ Identified common leadership responsibilities applicable to each officer position
- ❑ Designed 10 subject categories to reflect these key areas of responsibility including:
  - ✓ “Understand Your Members”
  - ✓ “Getting Organized with Tools”
  - ✓ “Documentation Management”
- ❑ Ensured that a responsibility to engage the member is reinforced in the training



# The CLE Ad Hoc Committee – Objective Statement

“By 31 December 2011, develop the IEEE Center for Leadership Excellence as the members' resource for volunteer training and world-class leadership development.”

(All Leaders)

# Lessons Learned

- ❑ Collaborative tools allowed for easy sharing and updates
- ❑ Set guidelines to achieve consistency
- ❑ Recognize there is a limit to review of source material
  - “Aim for success, not perfection” David Burns
- ❑ Validate throughout the process
  - ❖ Advice from subject matter experts
  - ❖ Get feedback from users before launching

# Primary Activities for 2010

1. Continue the expansion of the existing officer training modules
2. Define and initiate a management and leadership education structure for CLE

# Focus on Providing Advanced Content for Key Officer Positions

Build out the current modules for the five positions to provide a **best in class** training for each officer position.

- ❖ Common modules for all positions to include ...
  - Policy review of key items from IEEE Policies Section 9 and MGA Operations Manual
  - Master Brand awareness and usage
  - Member Engagement including Recruitment and Retention
- ❖ Tailored modules for all positions based on role
  - Conferences and workshops
- ❖ Unique modules for the position
  - Section Chair training on Awards

# Focus on Providing Greater Scope

## Create Additional Volunteer Position Training Modules

Section	Student Branch	Region
<ul style="list-style-type: none"><li>• Affinity Chair</li><li>• Student Activities</li><li>• Educational Activities</li><li>• Professional Activities</li><li>• Member Development</li><li>• Newsletter Editor</li><li>• Etc.</li></ul>	<ul style="list-style-type: none"><li>• Chair</li><li>• Vice Chair</li><li>• Secretary</li><li>• Treasurer</li><li>• Student Branch Counselor</li><li>• Student Branch Mentor</li><li>• Program Committee Chair</li><li>• Etc.</li></ul>	<ul style="list-style-type: none"><li>• Director</li><li>• Director Elect</li><li>• Past Director</li><li>• WIE Chair</li><li>• SPC Chair</li><li>• Career &amp; Employment Chair</li><li>• Audit Committee Chair</li><li>• Etc.</li></ul>

# Leadership Strategy

## Develop a CLE Long Term Leadership and Management Education Strategy

- ❖ Set a strategy to develop a Leadership framework that defines the course tracks for members at each stage of their life cycle
  - Systematic approach
  - Gain support of other OU's
  - Certification on track completion
  - Tracks discussed by committee include:
    - ✓ Interpersonal/Team Effectiveness
    - ✓ Understanding the Impact of Globalization
    - ✓ Planning and Financial Skills for Engineers
    - ✓ Managing in a Technical Environment

# 2010 Leadership Training

Design 2010 Management and Leadership modules in support of the Leadership Platform

❖ In 2010 identify and deliver select modules that most closely align with the professional development needs of members and that complement the Sections Congress program on Leadership theme.

- Assume up to five modules can be included by end 2010
- Training modules may exist as part of existing IEEE programs such as Expert Now, acquired from external knowledge experts or developed internally.
- All modules that reside on the Leadership platform are peer reviewed for content, message and design.
- Delivery medium may vary



# Future Goals of the CLE

- ✓ CLE will be where all IEEE volunteers and members go for answers, training and education
  - “One Stop Shop”
  - “the” link that gets bookmarked
- ✓ Establishes future leaders and viable succession planning
- ✓ Acknowledged member benefit

# 2010 Considerations for CLE Expansion

- Gaining alignment with other IEEE Organizational Units
  - Acknowledgement of CLE as the delivery vehicle for all member/volunteer training
- Expansion bounded by resource constraints
- Funding options for external modules
- Incorporating potential non-technical programs e.g. CS and IEEE-USA software development certification
- CLE Administrative Management
  - Recording/tracking in 360 Degree View

“Effective leaders develop through a continuous process of self-study, education, training, experience and reflection”



- We have all 'taken the red pill,' accepted our hat(s), and now we need the tools to succeed.
- Working together as all parts of the IEEE, we will accomplish this excellence TOGETHER



For Volunteers

Home About IEEE-USA Communications Career Navigator Public Policy Today's Engineer Online For Volunteers Event Calendar

→ IEEE-USA Home: For Volunteers

## Quick Links

### Volunteer Info

- [IEEE-USA Presidents](#)
- [Volunteer Leaders](#)
- [Committees](#)
- [PACE Network](#)
- [Event Calendar](#)
- [Awards & Recognitions](#)
- [Board of Directors](#)
- [Governing Documents](#)
- [U.S. Regions Quick Links](#)
- [How to Volunteer](#)
- [Development Support](#)
- [Forms](#)

### IEEE-USA Elections

- [2008 Election Results](#)

### About IEEE-USA

- [Intro to IEEE-USA](#)
- [IEEE-USA History](#)
- [Staff Contacts](#)

## Volunteer Central

IEEE-USA's  
[Membership  
Development  
Initiative](#)

IEEE-USA  
Program Handbook  
[2010][2008]

IEEE-USA  
Annual Reports  
[2009][2008][2007]  
[2006][2005][2004]

IEEE-USA's  
[Year in Review](#)  
[2010][2009]  
[2008][2007]

## CALL FOR NOMINATIONS

The IEEE-USA Nominations and Appointments (N&A) Committee asks for your help in identifying U.S. IEEE members who may be interested in, and well-qualified for, service on IEEE-USA committees and/or in IEEE-USA board positions. ▶ [contact](#)

## IEEE-USA Volunteer Who's Who

IEEE-USA Officer profiles:

- IEEE-USA 2010 President [Evelyn H. Hirt](#)
- IEEE-USA 2010 Past President [Gordon Day](#)
- IEEE-USA 2010 President-Elect [Ronald C. Jensen](#)



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**Geographic Activities Home** | [USA, Canada & Latin America](#) | [Europe, Middle East, & Africa](#) | [Asia & Pacific](#) | [Student Branches](#)

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#### Geographic Unit Operations

- [Affinity Groups](#)
- [Unit Bylaws/Addendums](#)
- [Chapters](#)
- [FAQs](#)
- [New Officer Information](#)
- [Quick Start Training for Geographic Unit Leaders](#)
- [Recognition Products \(certificates, plaques, banners\)](#)
- [Required Reporting / Rebates](#)
- [Resources for Officers](#)
- [Unit Formation / Petitions](#)
- [Member and Geographic Activities Homepage](#)

[IEEE Home](#) » [Geographic Unit Operations](#)

## IEEE Geographic Unit Operations



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Worldwide, IEEE membership is divided into Geographic Units called Sections. Together with their Subunits of Councils, Subsections, Chapters, and Affinity Groups, they conduct over 10,000 meetings annually. This activity supports the IEEE vision to advance global prosperity by fostering technological innovation, enabling members' careers, and promoting community worldwide. In addition, the Geographic Units can play a key role in promoting IEEE membership and retention of members.

### Announcing Quick Start Training for Geographic Unit Leaders

The MGA Leadership Training Initiative Ad Hoc Committee is proud to announce the release of the [Quick Start Training \(for Geographic Unit Leaders\)](#), a new training program designed for Geographic Unit Officers in their first 30 days in office. Quick Start Training was developed to help new Officers more quickly understand the roles and responsibilities of their positions and begin the process of member engagement.

#### What do you want to do?

- [Quick Start Training for Geographic Unit Leaders](#)
- [Recruit Volunteers](#)
- [Recognize Volunteer Contributions](#)
- [Learn about Sections Congress](#)
- [Help revive an inactive Section or Chapter](#)
- [Promote IEEE Membership](#)
- [Visit the IEEE Student Concourse](#)

#### Resources for Volunteers

- [Tools for Section & Chapter Officers](#)
- [vTools](#) - Electronic Tools for Volunteers
- [Financial Resources for Geographic Units](#)
- [Financial Reports, Forms & Rebates](#)



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#### IEEE Center for Leadership Excellence

[Link to Quick Start Training Home](#)

#### Training Modules by Position

- ▶ [Section Chair](#)
- ▶ [Section Vice Chair](#)
- ▶ [Section Treasurer](#)
- ▶ [Section Secretary](#)
- ▶ [Other Positions](#)

#### Standard Training (Phase 2)

[IEEE Home](#) » [Geographic Unit Operations](#)

## IEEE Center for Leadership Excellence



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The IEEE Center for Leadership Excellence is being created to meet the needs of IEEE members and volunteers.

When fully operational, it will serve 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.

Development of the IEEE CLE has been divided into 3 phases:

**[Phase 1 - Creation of IEEE Quick Start Volunteer Leadership Training](#)** . This training assumes you have been recently elected to a Geographic Unit position and want to quickly learn the basics of your

#### Reporting Quick Links

- [Meeting Report - Submit New](#)
- [Meeting Report - Query Past](#)
- [Officer Reporting Form](#)

#### Tools Quick Links

- [Geographic Roster](#)
- [SAMIEEE](#)
- [vTools](#)
- [e-Notice](#)
- [Entity Web Hosting](#) (Geographic Unit Web Pages)

#### Financial Quick Links

- [Geographic Annual Financial Report \(L50\)](#) (XLS, 303 KB)
- [Sample Section Budget](#) (XLS, 76 KB)



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http://www.ieee.org/portal/site

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<b>IEEE Expresses Condolences to Chile</b> The IEEE community worldwide extends its concern for the safety and well-being of our members, and their families and friends affected by the earthquake in Chile and its	<b>Conferences, Meetings, and Events</b> Locate <a href="#">upcoming conferences</a> or find <a href="#">volunteer/corporate meetings</a> and <a href="#">society, section &amp; chapter activities</a> in your local area. <a href="#">Learn More»</a> <b>Education</b>	<b>The New IEEE Xplore Digital Library</b> New interface, new search tools, better research results <a href="#">Learn more»</a> <a href="#">Visit the new IEEE Xplore»</a> <b>IEEE/IET Electronic Library</b> The complete collection for	<ul style="list-style-type: none"><li>Renew membership</li><li>Join IEEE or an IEEE Society</li><li>Donate to Haiti fund</li><li>Set up IEEE Web account</li><li>Log in to My Account</li><li>Find an IEEE standard</li><li>Get member e-mail alias</li></ul>

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### Boards and Organizations

- Board of Directors
- Educational Activities
- IEEE Foundation
- IEEE History Center
- IEEE Women in Engineering (WIE)
- IEEE-USA
- Member and Geographic Activities
- Publication Services and Products
- Standards Association
- Technical Activities / Societies

### Volunteer Resource Links

- Volunteer Training
- Quick Facts (About IEEE)
- Travel Services
- Author Tools/Submission Guide
- Conference Organizers
- Conference Publication Organizers


IEEE Home » [Volunteers](#)

## Volunteers

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Volunteers are an essential part of the IEEE organization. IEEE members who volunteer their skills and time take pride in knowing that they play an important role in an organization dedicated to enhancing the quality of life for all.

### Volunteering - IEEE Members Get Involved



Becoming an IEEE volunteer can be a gratifying and memorable experience. Whether your skills are suited for organizing conferences and meetings, financial reporting, communicating or maintaining web sites, chances are your local Section or Society is in need of someone with your expertise.

### Meeting & Conference Management (MCM)



#### February 2010 Meeting Series

Atlanta Marriott Marquis  
Atlanta, GA, USA  
9 - 15 February 2010

#### MCM Services

- [Internet Conferencing](#)
- [MCM Planning](#)
- [Teleconferencing](#)
- [Travel Services](#)

#### Volunteer News

- [Leadership Wire](#)
- [SCOOP](#) - Monthly News for Sections & Chapters
- [Society Sentinel](#)

IEEE - Volunteer Training Modules - Mozilla Firefox

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http://www.ieee.org/web/volunteers/training/index.html

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**All Volunteer Training Modules**

- ▶ Understanding the IEEE
- ▶ Membership
- ▶ Financial Advantage Program (FAP)
- ▶ Standards
- ▶ Educational Activities
- ▶ Online Products
- ▶ Display Setup
- ▶ S/C Finances: Overview
- ▶ S/C Finances: Budgeting Process
- ▶ S/C Finances: Financial Reports
- ▶ IEEE Acronyms

[IEEE Home](#) » [Volunteers](#) » [Training](#)

The training modules that follow are for Volunteers of IEEE. They are meant to help Volunteers understand how IEEE functions and to explain the many services IEEE has to offer.

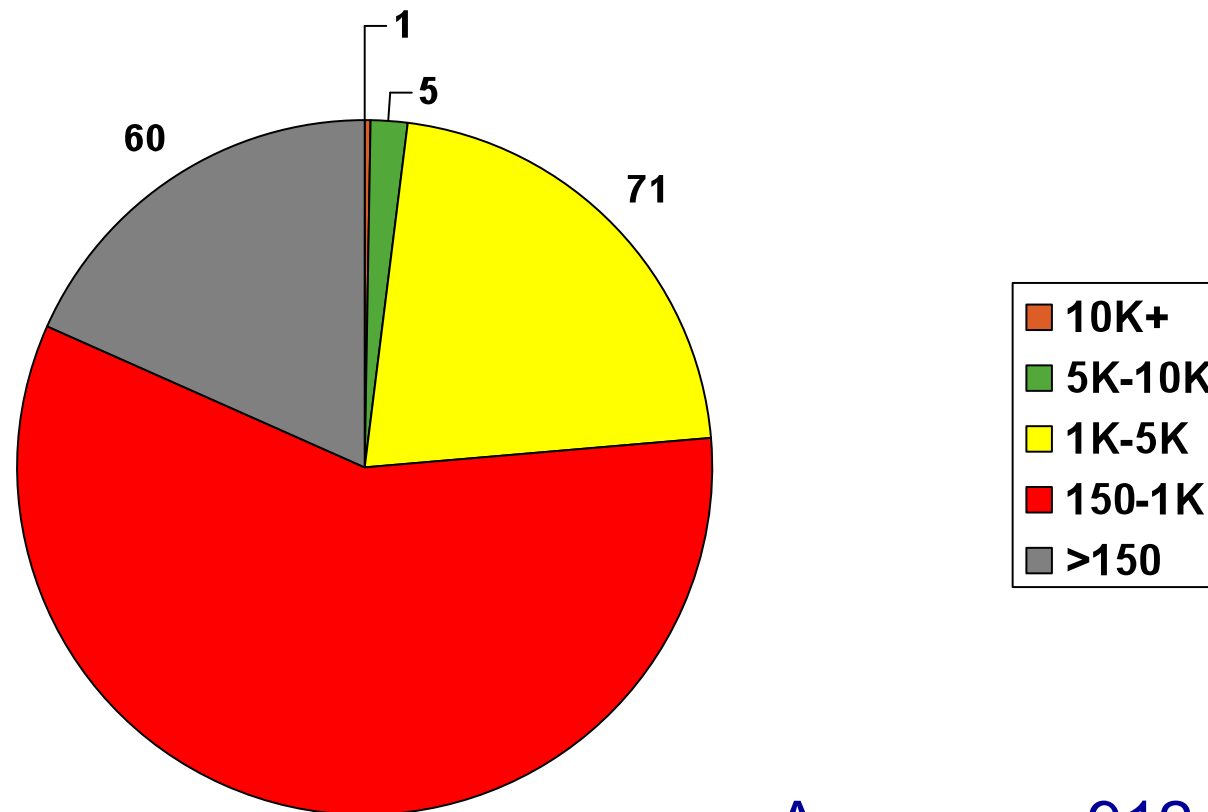
A list of available modules and brief descriptions of the content they cover are found below. You can navigate through each module as follows.

- Click "Learn more" to open the first page of each respective module.
- Navigate between modules using the left-hand menu on each page.
- Use the expanded menu on the left-hand navigation or the thumbnail navigation (arrows and circles) at the bottom of each page to move between pages in a module.

- [Understanding the IEEE](#)
- [Membership](#)
- [Financial Advantage Program](#)
- [Standards](#)
- [Educational Activities](#)
- [Online Products](#)
- [Display Setup](#)
- [Society & Council Finance: Overview](#)
- [Society & Council Finance: Budgeting Process](#)
- [Society & Council Finance: Financial Reports](#)

# Section Size by # Members - All Regions (not including Student)

(out of 325 Sections – 31 Dec 2007)



- Santa Clara Valley (R6) is the largest Section – 12,754

• Average = 912



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IEEE Operations Center  
445 Hoes Lane  
P.O. Box 1331  
Piscataway, NJ 08855-1331

>> Volunteer Resources

## IEEE Organization Roster - Part III

[<< View the Geographic Roster >>](#)

This roster provides contact information for IEEE Geographic Organizational Units: Regions, Councils, Sections, Subsections, Chapters, Student Branches and Branch Chapters.

Currently roster access is granted to every IEEE officer who is currently listed in either the Geographic and Technical Organization Rosters including as well as:

- Members of MGAB and its committees
- Members of TAB and its committees
- Current Society / Technical Council Officers and AdComs
- Members of the IEEE Executive Committee
- Current IEEE Board of Directors

**All users must have an [IEEE Web Account](#).** Authorization using the web account is based on current officer position or committee appointment. The data is updated every two weeks, and the most recent update is listed at the top of each Region's page. The data is pulled directly from the IEEE's membership database, and therefore reflects the most current information available from the members. Updates and corrections may be made by the individual volunteer using their web account. The corrected data will appear following the next "refresh" within two weeks.

Future plans include an interactive version of the roster. In the interim, to quickly find Sections and their officers, one should use the "Find on this page" function in the "Edit" menu of their browser. To achieve successful "find" results, be sure the page is fully loaded before beginning the search.

# Meeting Requirements

- **Sections & Subsections**
  - **At least 5 technical, non-technical or administrative meetings**
- **Chapter**
  - **At least 2 technical meetings**
- **Affinity Groups**
  - **At least 2 technical, non-technical or administrative meetings**

# IEEE Awards

- IEEE Medals / Awards
- Technical Society Awards
- MGA Awards
- IEEE-USA Awards
- Region 3 Awards
- Section Awards???

# Recognition Products & Supplies

- Banners, Certificates, Officer pins, and Plaques.
- For volunteers only
- Order online available

[http://www.ieee.org/web/geo\\_activities/units/products/index.html](http://www.ieee.org/web/geo_activities/units/products/index.html)



# Certificates



## CERTIFICATE OF APPRECIATION

Presented To

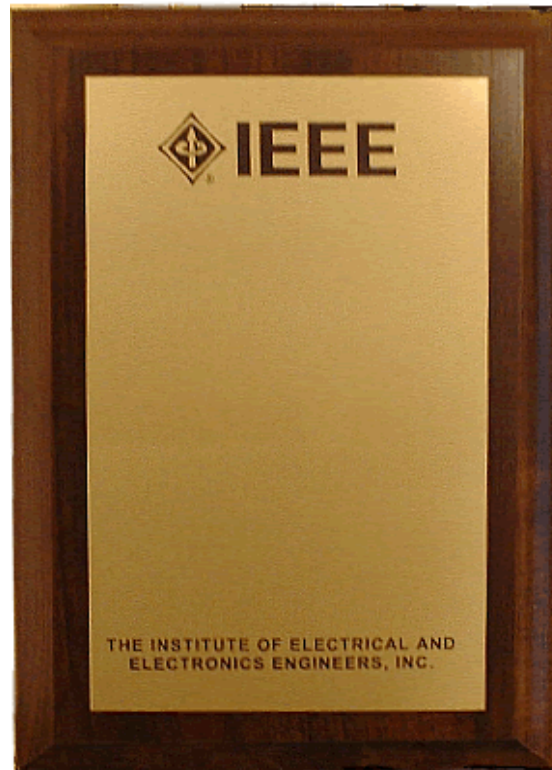
in recognition and appreciation of your valued  
services and contributions as



*Michael Lightner*  
President, IEEE



# Plaques



# Section or Chapter Chair Pins



# IEEE Member & Geographic Activities

## Helping Sections to Service Members

### Providing Member Relationship Management

**SAMIEEE – Volunteer access to member data & demographics**



Built from the experience of 3 million+ users

### Enabling Member Communications

**e-Notice - Electronic newsletter subscription service – 522 units enrolled (Regions, Councils, Sections, Subsections, Chapters, Societies, Student Branches and Conferences)**



**EWB – Web Hosting for over 1,150 units**

# Officer Confirmation

- Responsibility of Section Secretary
- Include all officers: Committees, Chapters, Affinity Groups
- Include member #s for verification
- Officers must be in good standing and Members
- Chapter Chairs must be a member of the Society

# Geographic Roster

- <http://www.ieee.org/roster>
- Must have an IEEE web account and must be listed in the Roster in order to have access
- Updated every two weeks
- Includes all Region, Section, and Council officers as reported to IEEE Staff
- Updates? officer-data@ieee.org
- Data extracted directly from IEEE member database



[Board of Directors](#)[Educational Activities](#)[IEEE Foundation](#)[IEEE History Center](#)[IEEE Women in Engineering \(WIE\)](#)[IEEE-USA](#)[Member and Geographic Activities](#)[Publication Services and Products](#)[Standards Association](#)[Technical Activities / Societies](#)

#### Volunteer Resource Links

[Volunteer Training](#)[Quick Facts \(About IEEE\)](#)[Travel Services](#)[Author Tools/Submission Guide](#)[Conference Organizers](#)[Conference Publication Organizers](#)[Geographic Unit Operations](#)[IEEE Board of Directors Resources](#)[IEEE-USA Volunteer Central](#)[Membership Development](#)[New Initiatives](#)[Standards Development](#)[Strategic Research & Planning](#)[Strategy Initiative \(login required\)](#)[Student Concourse](#)[Transnational Resources](#)[General Resources](#)

## IEEE Geographic Roster - Region 3

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### Regional Committee Members/Regional Society Organizers

#### Councils

Florida Council (FC)

North Carolina Council (NCC)

South Carolina Council (SCC)

Tennessee Council (TC)

Virginia Council (VC)

#### Sections / Subsections

Alabama

Montgomery Subsection

Atlanta

Broward Subsection

Canaveral

Central Georgia

Central North Carolina

Central Savannah River

Central Tennessee

Central Virginia

Charlotte

Chattanooga

Coastal South Carolina

Columbia

Daytona

East Tennessee

Eastern North Carolina

Lower Cape Fear Subsection

Evansville-Owensboro

Florida West Coast

Gainesville

Hampton Roads

Huntsville

Jacksonville

Jamaica

Lexington

Louisville

Melbourne

Memphis

Miami

Mississippi

Mobile

Northwest Florida

Orlando

Palm Beach

Piedmont

Richmond

Savannah

Tallahassee Area

Tri Cities

Virginia Mountain

Western North Carolina

Winston-Salem

#### Student Branch Counselors & Chairs

# Additional Information

## ■ The SCOOP Newsletter

- Monthly via email to Sections Chairs & other interested volunteers
- Quarterly expanded issue also distributed to Chapters
- Anyone can read online
- More info? [scoop@ieee.org](mailto:scoop@ieee.org)



**Is that in my job description?**

# I'm A Section Chair, I . . .

- Know all about: Bylaws\*; Policies & Procedures; MGA Operations Manual
- Chair meetings
- Work with ExCom, Committee, Chapter and Affinity Group Chairs to support activities
- Represent Section @ Region meetings
- Am a signer on bank account

# I'm a Section Vice Chair, I . . .

- Chair meetings in absence of Chair
- Am familiar with the policies relating to the activity of the Section and subunits, including bylaws\*, policy & procedures, MGA Operations Manual
- Assume additional authority or activity as designated by Chair

# **I'm a Section Treasurer, I . . .**

- Prepare the annual budget
- Record all financial activity
- Reconcile bank statements/activity
- Report status of unit's finances to the Section ExCom on a regular basis
- Prepare and submit Annual Financial Report (L-50)
- Signer on bank account

# **I'm A Section Secretary, I . . .**

- Record minutes of ExCom and other Section meetings
- Handle all correspondence
- Distribute meeting notices
- Maintain Section records
- Submit officer and meeting reporting, including officer changes during the year, to IEEE Operations Center

# I'm a Chapter Chair, I . . .

- Preside at Chapter ExCom and other mtgs..
- Work with other Chapter officers to determine program of activities for Chapter
- Represent Chapter at Section ExCom mtgs.. and Society-sponsored mtgs..
- Familiar with Section bylaws\*, policies & procedures, MGA Operations Manual, and any Society requirements for activity
- Submit or insure submission of required reporting to Section

# Does your unit have a . . .

- Student Activities Chair
- Awards & Recognition Chair
- Member Development Chair
- Historian
- Web master

*"Never underestimate the power of a small group of committed people to change the world. In fact, it is the only thing that ever has."*



**-Margaret Mead**



# QUESTIONS???