

# Region 1-6 Strategy

2011 MGA Board of Directors Retreat  
San Juan, Puerto Rico  
11 January 2011



# Outline

- **Foreshadowing the Strategy**
  - Unprecedented collaboration between IEEE OUs
  - Targets mature, under-represented and emerging markets
  - Engage ... members, potential members, and consumers
  - Revitalization of geographic units
- **Background**
  - Region 1-6 membership trends
  - Region 1-6 employment market
- **SWOT Analysis**
- **Elements of the Region 1-6 Strategy**
  - Target under-represented markets
  - Improve the value of membership
  - Improve the first-year member experience
  - Unemployment assistance and career transition to members
  - Geographic unit revitalization
- **Resources**
  - \$500k effort in 2011
  - Conservatively leverages 2.6× the financial investment

# Region 1-6 Strategy

Based on the regional geographic strategy framework, macro- and micro-data analysis, and prioritization, several elements of an overall US strategy emerge:

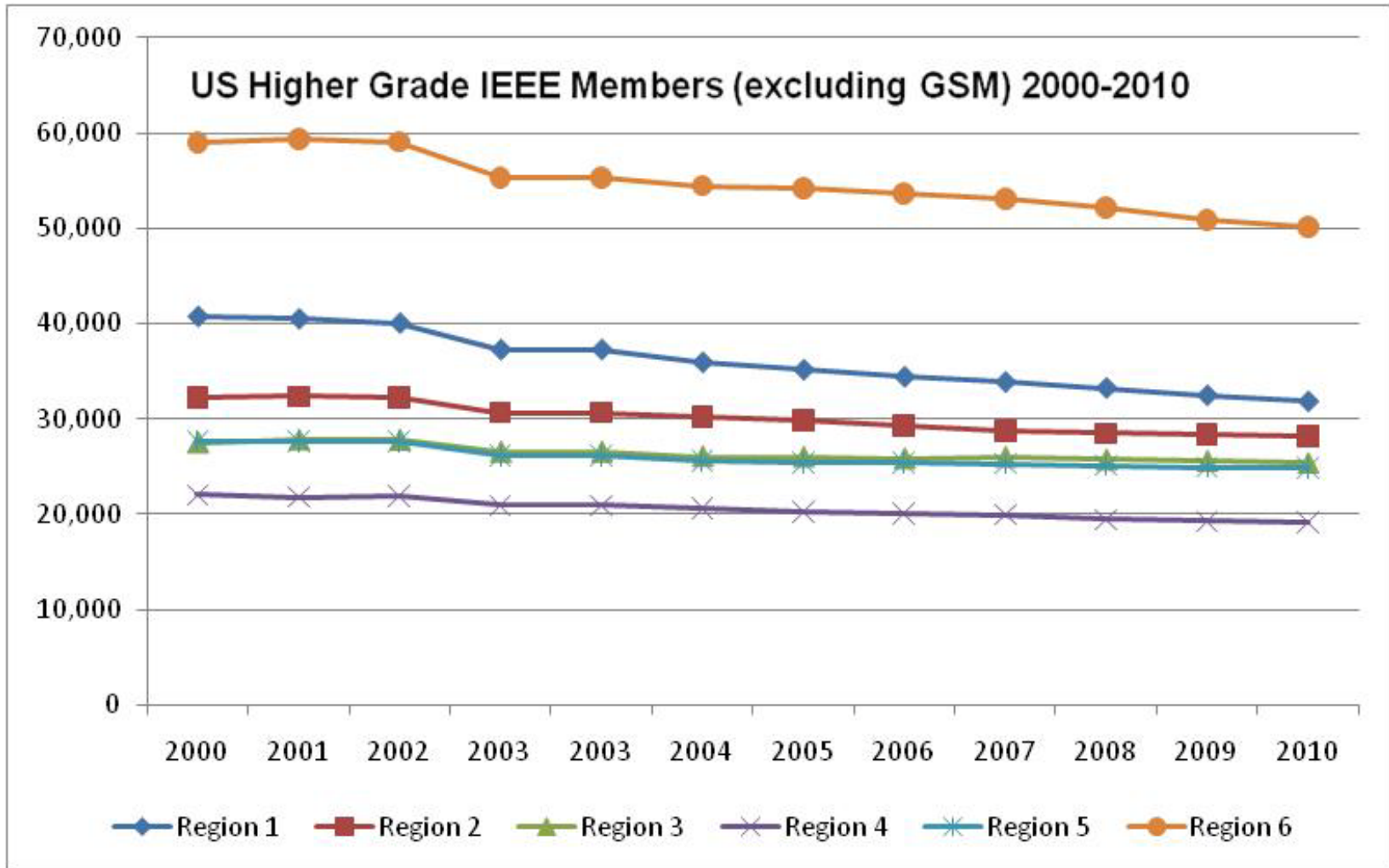
- Target under-represented markets
- Improve the value of membership
- Improve the First Year member experience
- Unemployment assistance and career transition to members
- Geographic unit revitalization

## USA – IEEE Regions 1-6



- ✓ Data
- ✓ Analysis
- ✓ Elements of a US Strategy

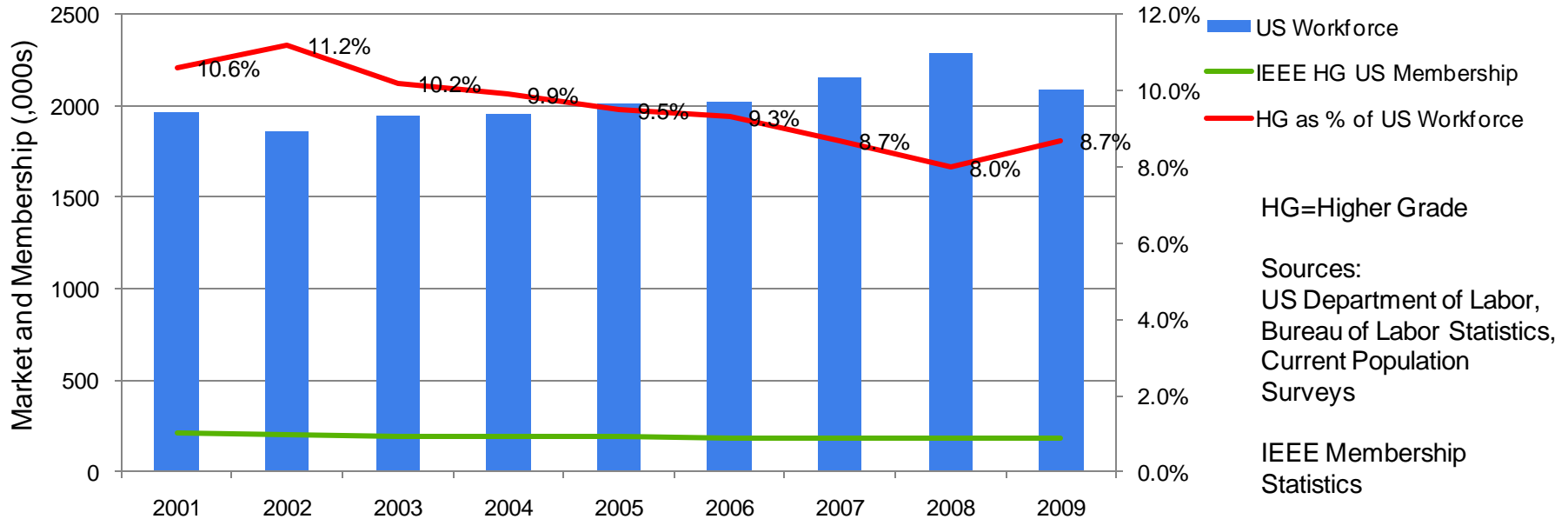
# Higher Grade US Membership Trends



Since 2003 US Higher Grade Membership has declined an average of 1.3% per year

# Market Development

## IEEE's Market share in the US is slightly declining

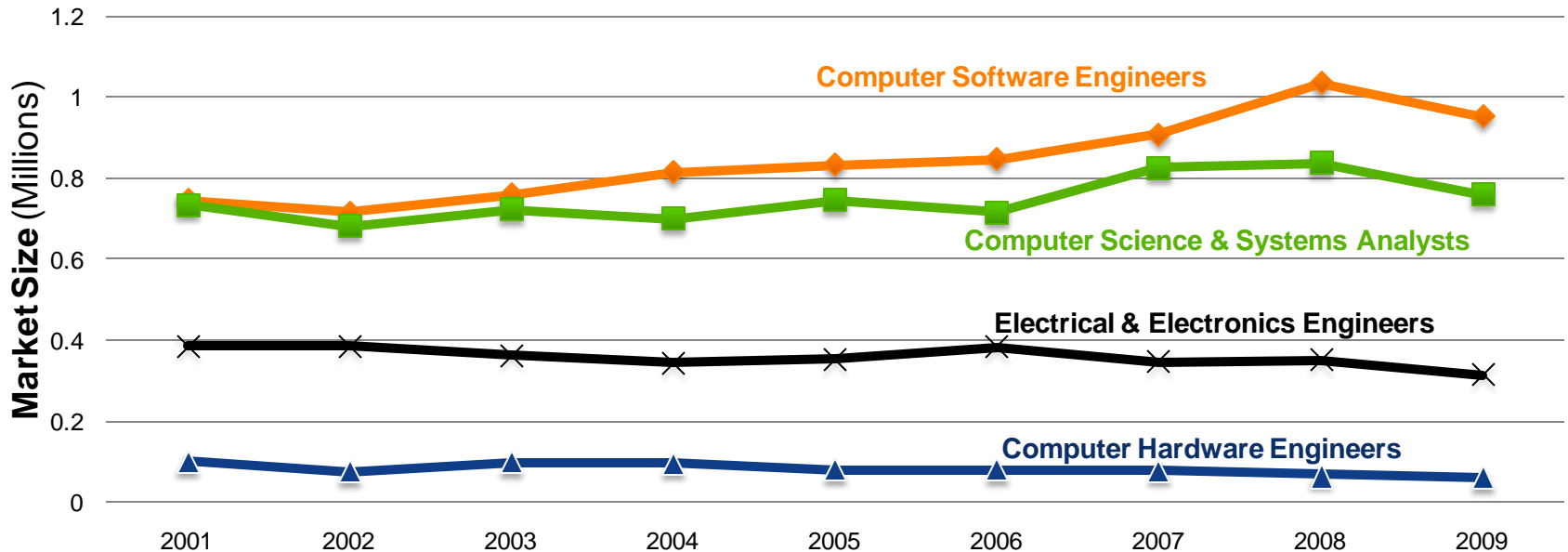


In IEEE key fields of interest (Electrical and Electronics Engineers, Computer Hardware Engineers, Computer Science & Systems Analysts, and Computer Software Engineers) IEEE membership has not kept pace with the markets.

# The US Market

## Combination of Mature, Under-Represented and Emerging Markets

US Dept. of Labor Bureau of Labor Statistics Employment Data



Since 2001, the number of people employed in these key IEEE fields of interest has only grown 6% to 2.1 Million people in 2009.

Certain segments are growing faster than others

- Computer Software Engineers grew 27% in the same period

Other markets

- Power and energy focus and Smart Grid opportunities
- IP Professionals – 10,004 active patent agents and 30,326 active attorneys with licenses to practice before the U.S. Patent and Trademark office

# New Members Come from Referrals

Significant membership growth comes from referrals

	Regions 1-6	
	Total	Higher Grade
<b>Referrals &amp; Recommendations</b>	<b>62%</b>	<b>45%</b>
College professor	30%	10%
Friend/colleague	22%	23%
Member referral	8%	7%
Manager/supervisor	2%	5%
<b>Advertising and Direct Outreach</b>	<b>9%</b>	<b>11%</b>
Search Engines	4%	4%
Advertisement	2%	2%
Direct mail/Postal mail	1%	2%
Email Invitation	1%	2%
Non-IEEE publications	0%	1%
<b>IEEE publications</b>	<b>9%</b>	<b>13%</b>
<b>IEEE conferences</b>	<b>8%</b>	<b>12%</b>
<b>Other</b>	<b>12%</b>	<b>19%</b>

Large percentage of new members come from referrals and recommendations.

Improving delivery of the core membership values will lead to more referrals and recommendations



# Quality of Member Experience

## Top 10 Gap (Satisfaction - Importance) - Higher Grade Members Region 1-6

Category	% Top 3 box	GAP	Importance
Career Resources and Recognition	Online career resources	-18%	10
Online access to publications	Online access to standards	-16%	2
Discounts	Discounts on professional products and services	-15%	4
Online access to publications	Online access to transactions, journals and magazines	-13%	1
Career Resources and Recognition	Representation on public policy issues related to the profession	-13%	8
Professional Networking	Professional networking	-12%	9
Career Resources and Recognition	Promoting the profession to the general public	-12%	6
Continuing Education	Continuing education opportunities	-11%	7
Online access to publications	Online access to conference proceedings	-7%	3
Volunteering / Giving Back	Contributing to the general public through humanitarian efforts	1%	18

*Data represents the gap between satisfaction and importance.*

We are focusing our efforts on improving value in the areas with the greatest potential return:

Career Resources & Recognition

Discounts

Online access to publications

Continuing Education

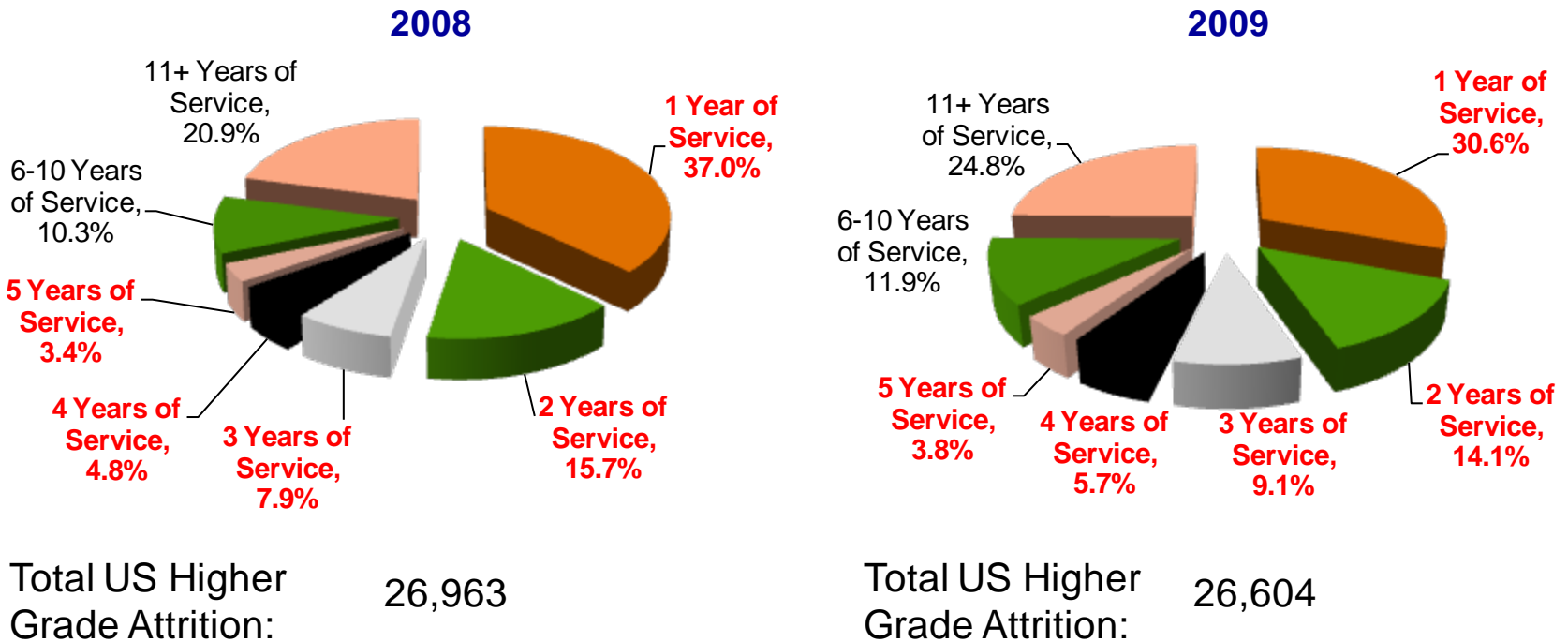
Professional Networking



# Member Development

## New member loss accounts for most of our attrition

### Region 1-6 Higher Grade Attrition



In 2008 and 2009, members with 5 years or less of membership accounted for 69% and 63% of our member attrition in the US

# Region 1-6 SWOT Analysis

## Strengths

- Strength of IEEE Brand
- Existing volunteer network
- Spectrum magazine
- Insurance
- Membership Development tools and MD volunteer network
- Student recruitment (2009 & 2010)
- Relative homogeneity – language, culture, currency
- HG retention at 5 years+ of service (93%)

## Weaknesses

- Geographic unit vitality and effectiveness
- Declining Higher Grade recruitment
- Perceived value/satisfaction in key areas of member importance
- First year member retention (40%)
- Student retention and conversion to member
- Member value proposition
- Products for practitioners
- Industry engagement
- IEEE IT Enterprise – support & navigation

## Opportunities

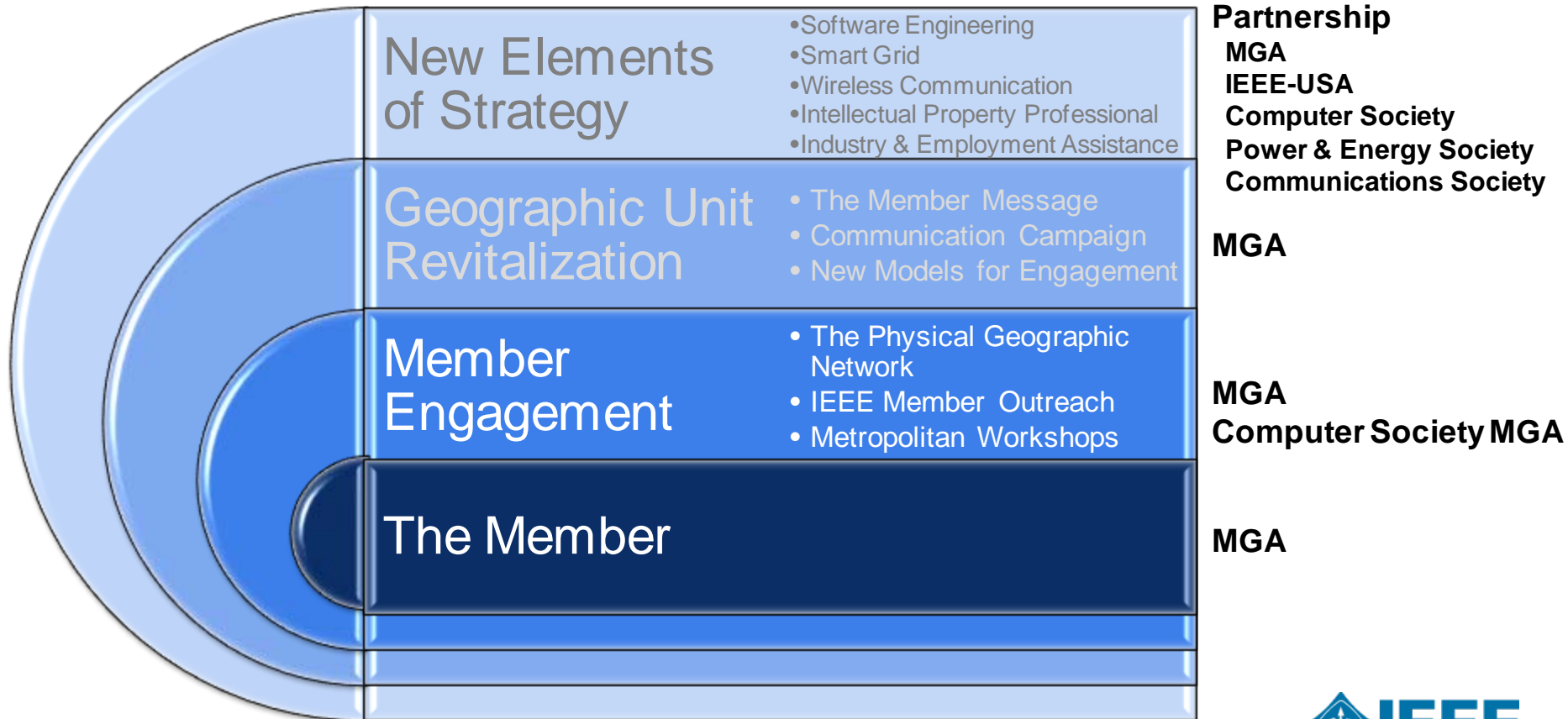
- Under-represented and emerging markets
- Cross-OU cooperation
- Improving career services, professional networking, and continuing education tools
- Improving geographic unit volunteer training & effectiveness
- Better leveraging of society offerings
- National-level emphasis on STEM programs

## Threats

- Continued membership decline and associated revenue impact
- Aging membership and younger generation perspective of society membership
- Open access may result in fewer members joining who value society journals
- Declining employment opportunities and migration of jobs
- # of students entering and graduating from STEM programs (and IEEE fields of interest)

# The Region 1-6 Strategy

## A Layered Strategy



# Strengthening the Foundation

## First Year Member Experience

### Improve First-Year Member Experience

- First Year Member Monthly Webinar
- New “Getting Started” guide
- Courtesy Call from Contact Center
- Welcome materials for local volunteers

## Membership Development

- Center for Leadership Excellence
- Membership Development Outreach & Communication

## Geographic Unit Vitality

### Geographic Unit Revitalization

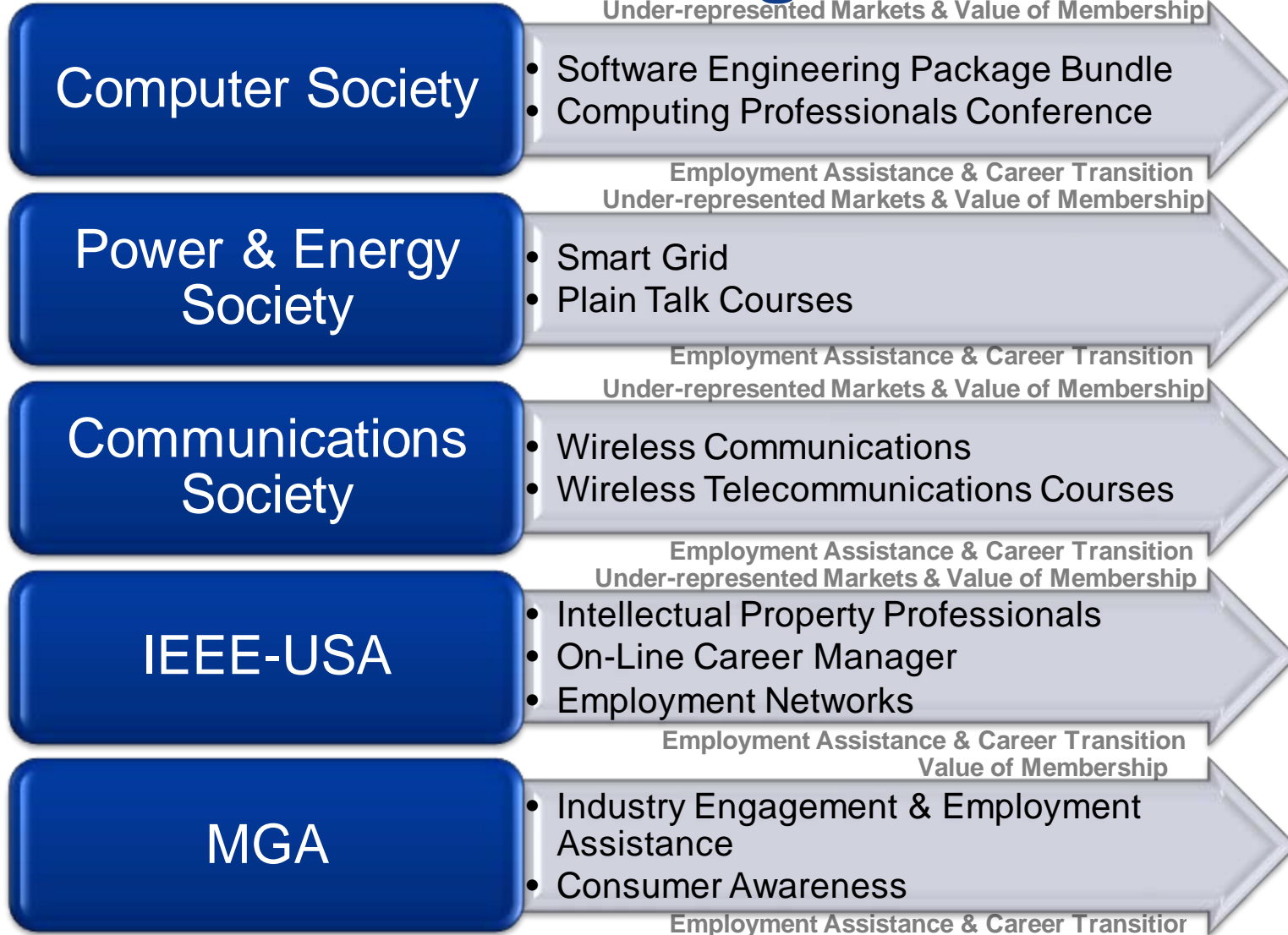
- The Member Message
- Communication Campaign
- New Models for Engagement

## Physical Geographic Network

### Geographic Unit Revitalization

- Regions
- Sections
- Chapters
- Student Branches

# Elements of the Region 1-6 Strategy



# Member & Geographic Activities

## ■ Geographic Unit Revitalization

\$60k

- Regional seed money focused on geographic unit revitalization.
- Regions provide matching funds for projects focused on member-focused engagement.

## ■ Metropolitan Area Workshops

\$65k

- Inter-Regional workshops that focus on the elements of the Region 1-6 strategy.

## ■ Communication Campaign

\$85k

- Mobilize the physical geographic network of Regions, Sections, Chapters, and Student Branches.
- Deliver new marketing material.

## ■ Industry Engagement & Employment Assistance

\$25k

- 2010 – Region 3 Pilot ... NIC funding
- 2011 – Export best practices to other Regions

# Revitalizing Geographic Units

## ■ Hallmarks of Vital Sections

1. *Update Section website monthly*
2. *Annual Awards program*
3. *Conduct annual social event which involves section members*
4. *Conduct joint events with other professional organizations*
5. *Conduct events with students - include students/young members in all activities*
6. *Personal Contact with members via telephone, email welcome notes*
7. *Section self assessment – establish annual goals and deliverables - improves continuity as the next leadership team takes over*
8. *Get member feedback via Section survey - a good online activity*

## ■ Data-Driven Engagement

- Use member data to identify topics of common interest within the member life-cycle.
  - Technical interests
  - Student, Graduate Student, GOLD, Member, Senior Member, Fellow, Life Member
  - Meeting model – traditional, virtual ... webinar, Dim-Dim, ...

## ■ Physical and Virtual Engagement

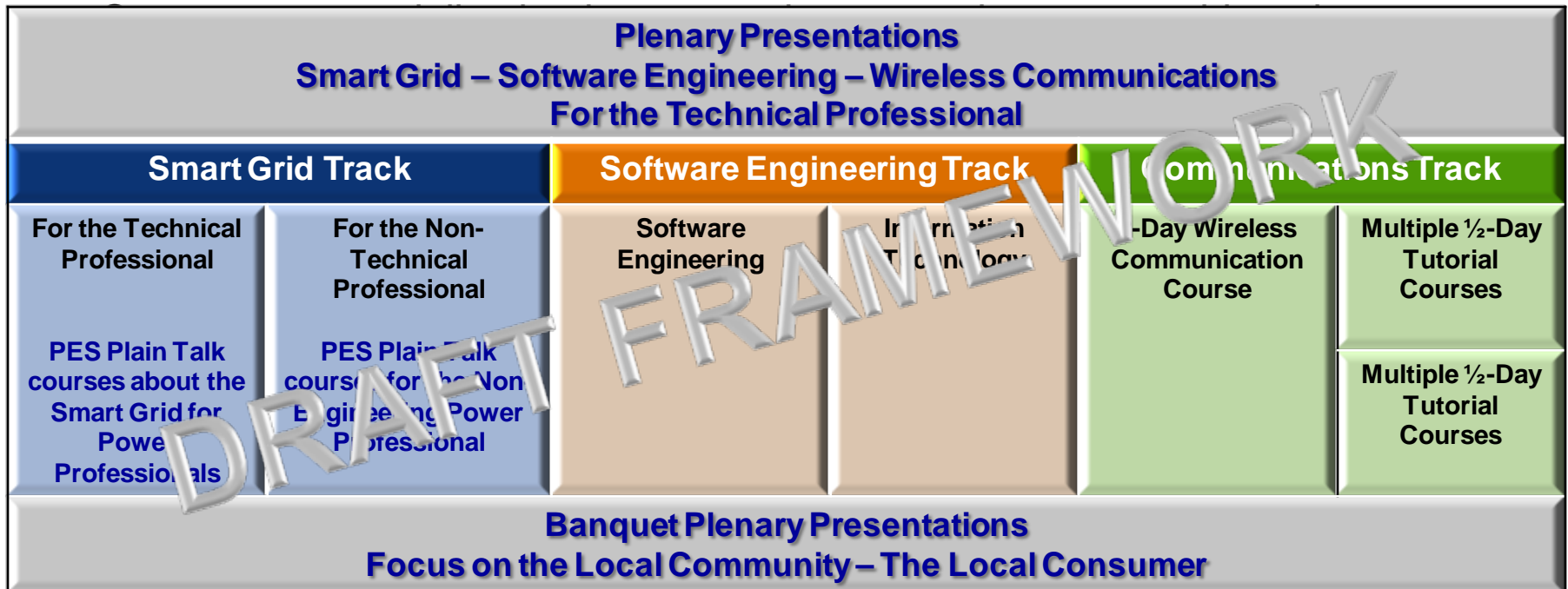
- Increased use of on-demand products and services

## ■ Collaboration

- Sections, Chapters, Student Branches
- Industry, Government, Academia ... establish local credibility

# Metropolitan Area Workshops

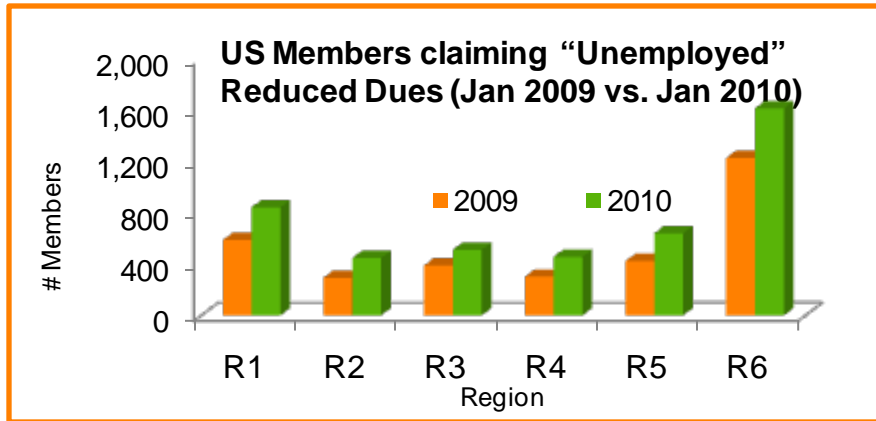
- Focus on large metropolitan areas to maximize participants and accessibility.
- Large-scale, multi-day, multi-track event focused on training and certification of technical professionals and education of the local consumer.
- Focus is on under-represented markets and potential growth sectors.
- Hosted by Regions, Sections and Chapters with technical content provided by Societies to maximize engagement and collaboration.



DRAFT FRAMEWORK



# Coordinated Industry Contact and Employment Assistance Pilot



2010 MGA Challenge – Region 3

*"We are faced with the coming layoffs of 10,000 or more engineers by NASA and their subcontractors in Florida."*



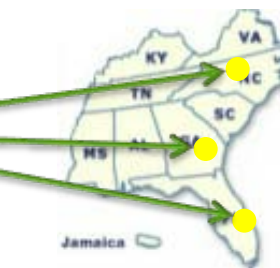
Employment & Career Services Committee



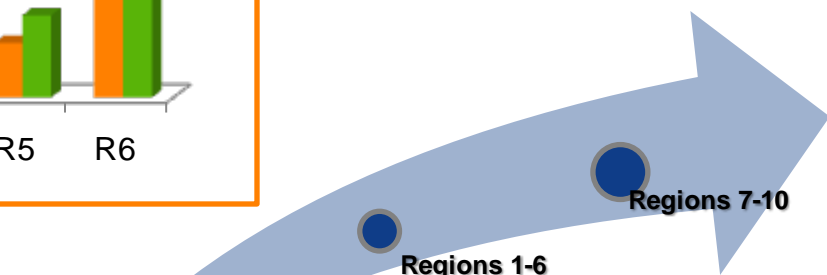
Career & Employment Materials



Product Customization



Geographic Network Delivery



**MGA Support of Global Professional Activities**



**To-date workshops held and volunteers in all 41 Sections of Region 3 trained**

# Member Development

## First-Year Experience Program

### Launched:

- First-Year Member Monthly Webinar
- New “Getting Started” guide to all new members
- Courtesy Call from Contact Center
- Pre-Defined SAMIEEE Queries for New Members
- Metrics and Benchmarking
- New member welcome materials for local volunteers
- New question in join application as of Dec ‘09
  - “How can IEEE best serve your needs”

### Coming Soon:

- Improved website for new members [ieee.org/start](http://ieee.org/start) (Q4 2010)
- “At Risk” Identification Processes

### Preliminary Assessment

- Program launched June 2009
- 2009 results: **24% increase year-over-year first year higher grade member retention** (2009: 39.8%; 2008: 32.1%)



# Computer Society



## ■ Software Engineering Package Bundle

\$50k

- Focus on the practitioner.
- Digital edition of Software and ITPro magazines, access to Computer Society's 50-title webinar library, coupon for CSDA/CSDP certification program and 3-5 EssentialSets.†
- Collateral development and the plan and execution of outbound marketing to the under-represented target audience.
- MGA distributes the bundle through the physical geographic network of Regions, Sections, Chapters and Student Branches.

## ■ Computing Professionals Conference

\$40k

- A new annual conference focused on practitioner's needs featuring plenary talks by leaders and luminaries identifying where the field is going, training sessions, tutorials, workshops, certifications.
- Conference is currently planned for 2012.



† EssentialSets are collections of topical content assembled by the CS editorial boards from digital library for target audiences.

# Market Development

## Leveraging the Growth of the Software Engineering Segment

- Aggressive marketing – the *under-represented market*
  - ✓ New member recruitment
  - ✓ Continuing education, certification, publications
- Retrain unemployed members or those interested in moving into this growing area – the *mature market*
  - ✓ Continuing education, certification, publications
- Target CS, IT, and Systems Engineering Departments to ensure student growth pathway



# Power & Energy Society



## ■ Plain Talk Courses

- PES Plain Talk courses about the Smart Grid for Power Professionals
- PES Plain Talk courses for the Non-Engineering Power Professional

## ■ Power Engineering Careers

- Students, Employers and Faculty

## ■ Consumer Awareness

## ■ Workforce Collaboration

Projected **Global Smart Grid Market by Technology, 2009 and 2014**  
in U.S. billions | (compound annual growth rate in parentheses)



# Communications Society



- **1- and 2-Day Courses**
  - Wireless Telecommunications Technology
  - Practical Wireless Communications Engineering
  
- **Short Courses and Tutorials**
  - Conference tutorial model
  
- **On-Line Training**
  - Virtual intensive course on Wireless Communications Engineering
  
- **Certification**
  - Wireless Communication Engineering Technologies Certification



# IEEE-USA



## ■ Intellectual Property Professionals

- Develop an organizational “home” and series of targeted products and services for intellectual property professionals active in technology.
- Engagement with a community of intellectual property practitioners – patent lawyers, technical professionals, entrepreneurs, and others employed in both small businesses and large industries whose interests overlap law, public policy, technology and engineering practice.
- 1 October 2010: 10,004 active patent agents and 30,326 active attorneys with licenses to practice before the U.S. Patent and Trademark office.



## ■ On-Line Career Manager

- Develop an integrated set of web-based tools and resources for career planning, self assessment, benchmarking, skills practice and mentoring.



## ■ Employment Networks

- Provide opportunity for members to network with employers to learn about company hiring needs, employment trends and job opportunities.
- Promote and deliver IEEE employment-related projects and services (including IEEE-USA employment assistance services) to members in need.



# Measures of Success





# Measuring Success

	Member Satisfaction	Membership Growth	Volunteer Satisfaction	Partner Satisfaction
Geo Unit Revitalization	✓		✓	
Metropolitan Workshops		✓	✓	✓
Communications Campaign		✓		
First Year Experience	✓	✓		
Employee Assistance and Employment Networks	✓	✓		
Software Engineering Bundle	✓	✓		✓
Computing Professionals Conference	✓	✓	✓	✓
Intellectual Property Professionals		✓		
Online Career Manager	✓			

# Measuring Success

Program (Strategy) Metrics	Activity Metrics	Project Metrics
Retention of Higher Grade Members	Geo Unit Revitalization	Event Participation Member Satisfaction Retention of Attendees
Recruitment of Higher Grade Members	Metropolitan Workshops	Attendance Participation in tracks
Geographic Unit Vitality	Communications Campaign	Kits ordered Standard campaign metrics
Share of under-represented markets	First Year Experience	Participation rates Satisfaction
	Employee Assistance and Employment Networks	Member awareness Program participation Standard campaign metrics
	Software Engineering Bundle	Awareness Program Participation rates Standard campaign metrics
	Computing Professionals Conference	Standard campaign metrics Event attendee satisfaction
	Intellectual Property Professionals	Participation rates Satisfaction
	Online Career Manager	Participation rates Satisfaction

# Budget

Recommendation to submit NIC Phase I proposal – 22 October 2010

Favorable NIC response to Phase I proposal – Requested Phase II Proposal – 29 November 2010

Budget Item	Year One 2011	Year Two 2012	Year Three 2013	Initiative Totals
Anticipated Revenue	\$0	\$176,000	\$354,000	\$530,000
Anticipated Expenses (less HR)	\$425,000	\$395,000	\$395,000	\$1,215,000
Anticipated HR Costs	\$75,000	\$75,000	\$75,000	\$225,000
<b><i>Initiative Net</i></b>	<b><i>(\$500,000)</i></b>	<b><i>(\$294,000)</i></b>	<b><i>(\$116,000)</i></b>	<b><i>(\$910,000)</i></b>

2011 revenue impact is anticipated to be minimal. The primary reason is that the 2011 membership year ends in August.

Currently U.S. higher grade membership is declining 1.3% per year. We project that this strategy will reduce this decline by 1/2 in the second year and eliminate the decline completely in the third year. The anticipated revenue estimates reflect this assumption.

# Leveraging OU Resources

## MGA

- **Membership Development**

- Focused promotional campaigns directed at Region 1-6 recruitment and reinstatement.

**\$75k**

- **First Year Experience**

- Focused activities for new Region 1-6 members.

**\$10k**

- **Data Collection**

- Additional data purchases or collection to ensure efforts are as direct and targeted as possible for the greatest ROI.

**\$25k**

## IEEE-USA

- **Annual Budget**

- IEEE-USA annual budget dedicated to Region 1-6 members.

**\$794k**

# Leveraging OU Resources

## Computer Society

- **Computing Professionals Conference**
  - Conference focused on adding direct value to practitioners.
- **Tutorials and Certifications**

**\$350k**

*Existing*

## Power & Energy Society

- **Plain Talk Courses**
  - The Smart Grid for Power Professionals
  - For the Non-Engineering Power Professional

*Existing*

## Communications Society

- **Short Courses and Tutorials**
  - Wireless Telecommunications Technology
  - Practical Wireless Communications Engineering
- **Certification**

*Existing*

*Existing*

# Discussion

- Questions & Discussion.

- **Request:**

- **Board approval of the Strategy.**

- *Resolved that the Region 1-6 Strategy shall be approved as presented.*



- **Funding.**

- **NIC Funding**

- Due diligence completed ...

- NIC Phase I proposal submitted – 22 October 2010

- Requested Phase II proposal – 29 November 2010

- Review and prioritization – 6 December 2010

- IEEE Board decision – January 2011

- **Reserves**

- Due diligence completed ...

- Presentation to IEEE FinCom – 20 September 2010

