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Subject: Leadership Training for Sections Region 3 Report
Date: March 14, 2014 at 12:40 PM
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Dear Mary Ellen, Region 3 Chair,

I am sorry I am not able to attend this year's Region 3 meeting. Drew Wellman, our new vice chair will be representing our section at SoutheastCon. Amy De Jongh Curry is our new chair. I will be continuing as Computer Society Chair.

I wanted to give you an update on the leadership workshop project for Region 3. I spoke to several people in Region 3 and at IEEE USA. From these conversations, I developed an outline for a leadership workshop. Our section held a leadership workshop in 2013, and we had a follow up discussion on how to make a more comprehensive leadership training program in collaboration with other sections. Below is an outline of the ideas and resources for training. I will continue to work on this this year. I plan to hold this workshop with our section and invite other sections as well in 2013. The project is larger than originally anticipated but we did get useful inputs and have an outline for a weekend leadership training workshop to work on.

I am sorry I won't be at SoutheastCon to presents this. I will update you in the next few weeks on the next steps of the plans for workshop retreat.

My best regards

Yuri Quintana

Region 3 - Leadership Workshop Working group

- * Yuri Quintana, Chair (IEEE Memphis Chair) yuri.quintana@ieee.org
- * Mary Ellen Randall (Region 3 president elect) merandall@ieee.org
- * Bill Ratcliff (Region 3 Director Elect) w.ratcliff@ieee.org

Region 3 Leaders <http://ewh.ieee.org/reg/3/comp.html#>

- * David Green (IEEE Region 3 past president) d.green@ieee.org
- * Gregg L. Vaughn (IEEE Region 3 Secretary) g.vaughn@ieee.org
- * John Montague Region 3 PACE montague@ieee.org

IEEE Memphis Leadership Workshop group

- * Amy de Jongh Curry (IEEE Memphis Vice Chair, IEEE Memphis EMBS Vice Chair) amy.curry@iee.org , adejongh@memphis.edu
- * Divya Choudhary (IEEE Memphis WIE Chair) dchodhry@cbu.edu
- * Chad Baker (IEEE Memphis, Computer Society Vice Chair) cmbaker@cbu.edu
- * Emanuel Villa (IEEE Memphis EMBS Chair) emanuel.villa@ieee.org
- * Renee Stoll (IEEE Memphis Treasurer) RStoll@mlgw.org
- * Frank Niedzwiedz (IEEE Memphis PACE Chair) FrankN@RNSystemsDesign.com

Invitations to join the planning of joint leadership training workshop

IEEE Nashville EXCOM Sara Elliot (sara22@ieee.org <http://ewh.ieee.org/r3/nashville/>)

IEEE Ole Miss IEEE sections (Paul M. Goggans, Ph.D. goggans@olemiss.edu
<http://www.ee.olemiss.edu/ieee/>)

IEEE Chattanooga (R. Paul Barnett, PE , Chair rp Barnett@ieee.org

IEEE The University of Tennessee at Martin Jeff McCullough, Ph.D.
jsmccullough@utm.edu

IEEE Union University - Randal S. Schwindt, Ph.D., P.E. Jackson, Tennessee
rschwind@uu.edu

Proposal: IEEE Memphis chapter is developing a leadership training workshops for our IEEE executive committee, EXCOMs leaders, and for professional engineers in Region 3.
<http://sites.ieee.org/local-sections-chapters/region-3/#Sections>

Format: We will have some 2-3 speakers, some hands on and interactive session (maybe corporate improv training sessions), break out session for groups to developing leadership strategic plans, and some informal networking opportunities

When: Summer 2014

Intended Audience:: leaders of non-profit groups, leaders of technical teams, managers, director, and VP level,

Sample Topic for a weekend workshop:

- Developing mission and vision statements
- Developing strategic and tactical plans
- Effective communication strategies for leaders
- Recruiting and motivating volunteers in community service
- Effective volunteer recognition programs
- Leadership styles and personalities,
- Knowing you leadership strengths and weaknesses
- Matching leaders styles to leadership opportunities

Other topics for future leadership seminars or workshops:

- Leading technical teams,
- Leading multidisciplinary teams,
- Effective mentoring techniques,
- Metrics and evaluation of leadership performance,
- Planning and managing leadership transitions,
- Planning leadership paths and opportunities for emerging and potential leaders.

Leadership Workshop Plan – For Region 3 EXCOM Sections - Developed by IEEE Memphis Section - October 7, 2013

Objective: Develop leadership skills of EXCOM members to grow their programs and promote activities.

Format: It is designed to be a 1 or 2 day workshop retreat. Each part would have a presenter/facilitator who would give a 30-minute presentation followed by a 30-60 minute group discussion with a deliverable. The retreat could have 2-3 sections participating with breakout sessions for group activities by sections.

Part 1 - Brand and Identity

Presentation Topics: (invite external speaker)

Review of role of IEEE, IEEE USA, and Region 3?

Who are our members in the region and section (by demographics, by technical society)?

What are our member preferences (review member survey results)?

What are the key elements of a brand? Does what is the IEEE brand message?

Group Discussion/Activity:

Who are we (EXCOM) and what are the roles and responsibilities of each position?

What do we want to get out of being an EXCOM member? What do you find rewarding?

What makes you most proud about the profession and IEEE?

How do we communicate the image of IEEE and engineers to our community?

How to describe IEEE to new young member? New mid-career member?

Are we describing IEEE, our section, technical sections and affinity groups properly to each target group?

What roles do leaders have in promoting the brand and identity?

Deliverable:

Each member to deliver a 1 minute elevator speech that summarizes 1) IEEE 2) IEEE Memphis 3) the engineering profession?

Part 2 - Strategic Planning

Presentation Topics: (invite external speaker)

What is strategic Planning?

What is a goal? What is an objective?

What are metrics and milestones for success?

What are good leadership approaches to developing a strategic plan?

Group Discussion/Activity:

Review previous strategic plan? What did we achieve? What did we miss?

Brainstorming on strategic ideas for next year.

Discussion our strategic plan and any modifications to our plan.

Do we need to modify our mission and vision for our section??

Do we have the right metrics? How are we progressing on those metrics?

What are our targets goals for the next year?

What are our targets goals for the next year?

What is our 5 year vision of the section?

What we want the section to look like 5 to 10 years from now?

Deliverable: Revise Strategic Plan

Part 3 - Tactical Planning

Presentation Topics: (invite external speaker)

What is a tactical planning?

What tactics worked for other sections?

Group Discussion/Activity:

Divide into groups and develop tactical plan to achieve goals in our strategic plan.

Suggested groups 1) GOLD 2) WIE 3) STEM 4) SPAC 5) Technical Societies

Deliverable: Tactical plan for Gold, WIE, STEM, SPAC

Part 4 - Team Building

Presentation Topics:

Recruiting and Motivating Volunteers (invite external speaker)

Group Discussion/Activity:

What is challenging to us in performing these duties?

What can we do to prepare incoming people to these positions (job descriptions, notes of local contacts, tips and suggestions).

What position do you want next year? What are the missing positions we have?

Strategies for recruiting new EXCOM leadership members

Deliverable: Action Plan for recruitment and nomination process.

Part 5 - Marketing our Section

Presentation Topics: (invite external speaker)

How to communicate and Market a Brand

Examples of sections and NGOs that employed innovative marketing approaches to grow their members

Group Discussion:

Develop Action plans for recruit new members

Suggested groups 1) Students 2) GOLD Recent Graduates 3) Mid-Career 4) Senior and Life Members

What are the key messages we need to communicate to each group? (Elevator Speech or marketing pitch to targeted groups)

What communication mediums (twitter, facebook, email, print, phone calling) can we

use to deliver this message to each target group?

use do we deliver this message to each target group?

Deliverable: Action Plan for Membership Development.

Part 6 - Leadership Pipeline and Section Sustainability

Presentation Topics: (invite external speaker)

Strategies for developing a succession plan and continuing education.

What leadership competencies? How can we evaluate leaders and provide feedback?

Group Discussion/Activity:

Should we encourage people to have some positions before another position?

How can we develop a mentoring plan for our leadership positions. (past leader can mentor incoming leader in that position)

What are continuing education resources on leadership from IEEE and other sources?

What training resources are there from other societies or books that we could apply in our section?

What training do we want to have for leadership development? Who should develop it (local section, region, national)? Can we co-develop in partnership with others? Who should we partner with?

Deliverable: Leadership training topics do we want to focus on for next year and who can lead this.

Outcomes and Evaluation

Conclusion: Certificate to attendees (We should try to get credit hours for the event).

- Certificate to attendees with credit hours for the event (did participants value and need this?) .
- Participant exit survey (content, format, venue, expectations met?)
- Follow up survey in 9 months to see if desired impact achieved. (did sections increase members, better attended events, member satisfaction survey) and did EXCOM member obtain desired benefit (skills that they can apply in section and in their workplace)
- Continuing education plan (did we connect with local and national organizations to provide a path for continuing education and development)

Possible Retreat Locations: (Detail of all locations at end of this email)

Lake Barkley State Resort Park, Land Between The Lakes, KY

<http://parks.ky.gov/parks/resortparks/lake-barkley/default.aspx>

Inn at Pickwick Landing <http://www.tn.gov/environment/parks/PickwickLanding/>

Sheraton. Chattanooga <http://www.sheratonreadhouse.com>

The Chattanooga <http://www.chattanoogaanhotel.com/>

Hutton Hotel Nashville <http://www.huttonhotel.com>

IEEE Leadership Training Resources:

IEEE <http://ieee-elearning.org/CLE/>

IEEE PACE training:

<http://www.ieeeusa.org/calendar/conferences/annualmeeting/2011/program/files/PACET raining.pdf>

IEEE USA 2013 Conference: <http://sites.ieee.org/ieeeusa2013/program/program-at-a-glance/>

ASTD Society Chapter Leadership Training Materials

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<http://www.astd.org/Publications/Books/Leadership-Training>

ASTD Leadership Training: <http://www.astd.org/Publications/Books/Leadership-Training>

Leadership Training (ASTD Trainer's WorkShop Series) [Paperback]

http://www.amazon.com/gp/product/1562863231/ref=oh_details_o02_s02_i00?ie=UTF8&psc=1

their book was written by Lou Russell is president and CEO of Russell Martin & Associates <http://www.russellmartin.com/>

Chapter Leader Resources: <http://www.astd.org/Members/Chapters/Chapter-Leader-Community/Chapter-Administration>

Webcasts <http://www.astd.org/Members/Chapters/Chapter-Leader-Community/Leadership-Development/Archived-Webcasts>

2013 Conference: <http://www.astd.org/Members/Chapters/Chapter-Leader-Community/Leadership-Development/ALC-New>

Leadership for Engineers

The Royal Navy Way of Leadership: Managing is Doing Things Right. Leadership is Doing the Right Thing [Import] [Hardcover]

http://www.amazon.com/gp/product/1848093454/ref=oh_details_o04_s00_i00?ie=UTF8&psc=1

Leadership for Engineers: The Magic of Mindset [Paperback]

http://www.amazon.com/gp/product/007338593X/ref=oh_details_o02_s00_i01?ie=UTF8&psc=1

IT Leadership Alchemy [Paperback]

http://www.amazon.com/gp/product/013009403X/ref=oh_details_o03_s00_i00?ie=UTF8&psc=1

Other Resources:

Project Management Institute - Leadership Training Materials :

<http://marketplace.pmi.org/Pages/default.aspx?Category=ELLeadershipSkills>

Leadership Training Resources from the Council of Nonprofit

<http://www.councilofnonprofits.org/resources/resources-topic/leadership>

Coaching Federation <http://www.coachfederation.org/>

Dale Carnegie Training <http://midsouth.dalecarnegie.com/>

American Management Association

<http://www.amanet.org/training/seminars/leadership-training.aspx>

Leadership Books:

Principle-Centered Leadership by Stephen R. Covey http://www.amazon.com/Principle-Centered-Leadership-Stephen-R-Covey/dp/0671792806/ref=pd_rhf_ee_s_cp_5_G1YD

Reading List from Harmony Inc. <http://www.harmonycc.net/reading.php>

The Royal Navy Way of Leadership: Managing is Doing Things Right. Leadership is Doing the Right Thing [Import] [Hardcover]

http://www.amazon.com/gp/product/1848093454/ref=oh_details_o04_s00_i00?ie=UTF8&psc=1

Technical Leadership

Leadership for Engineers: The Magic of Mindset [Paperback]

http://www.amazon.com/gp/product/007338593X/ref=oh_details_o02_s00_i01?ie=UTF8&psc=1

IT Leadership Alchemy [Paperback]

21 Leadership / Identity [Paperback]

http://www.amazon.com/gp/product/013009403X/ref=oh_details_o03_s00_i00?ie=UTF8&psc=1

Student Leadership

The Student Leadership Challenge: Five Practices for Exemplary Leaders [Paperback]

http://www.amazon.com/gp/product/0470177055/ref=oh_details_o02_s03_i00?ie=UTF8&psc=1

The Student Leadership Challenge: Student Workbook and Personal Leadership Journal [Paperback]

http://www.amazon.com/gp/product/1118390091/ref=oh_details_o02_s00_i00?ie=UTF8&psc=1

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