



**IEEE Membership
Development Planning
Workbook**

2016 Membership Year

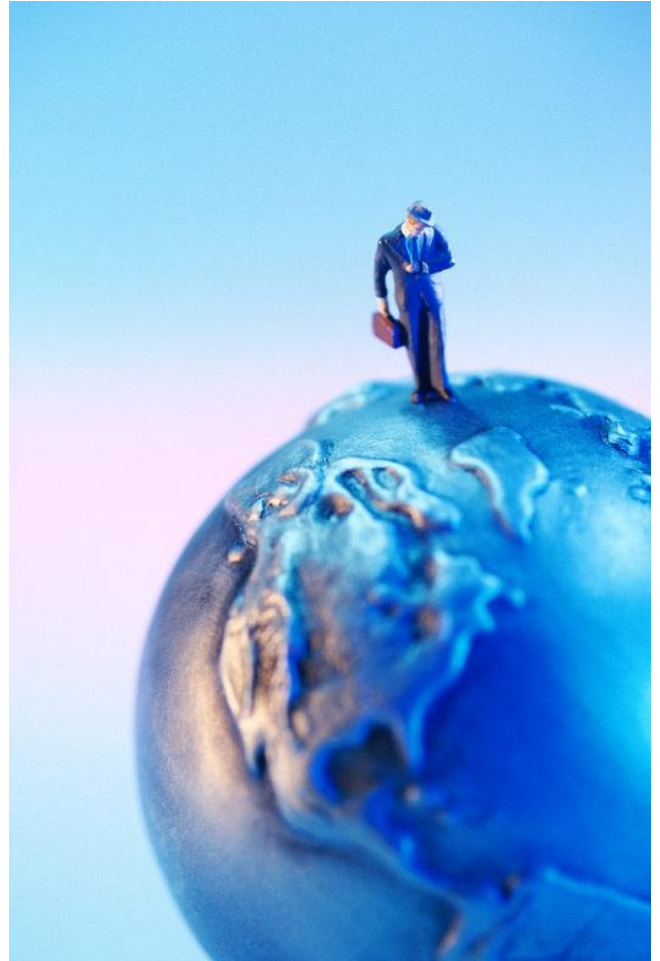


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Preface

This document has been developed as a resource for IEEE Volunteers and Staff and is not intended for general circulation with promotional materials.

In addition, this document is intended to be an addendum to the Annual Membership Development Manual distributed by IEEE Member & Geographic Activities (MGA). It should serve as the starting point for the **planning** of all membership development activities and should be used as a workbook by all Volunteer Leaders responsible for membership development.

With that being said, it should not replace the Membership Development Manual which still serves as the full reference document for Membership Development.

Thank you,
IEEE Member Market Development Team

What is Membership Development?

LEAD DEVELOPMENT + RELATIONSHIP MANAGEMENT

This simple formula represents what it takes to have a successful Membership Development (MD) program. MD is a function of recruiting new members (Lead Development) as well as retaining existing members (Relationship Management). This is accomplished by ensuring your members are receiving the “value” they expect from being an IEEE member. “Value” can have many different meanings, as our membership encompasses a vast array of technical disciplines, nationalities, and most importantly, unique personalities.

To best deliver the “value” members expect, each Section must first understand what their members are interested in. From there, volunteers can work on planning a member experience that suits their member needs. As you can imagine, “Membership Development” is so much more than recruiting members. It is taking on the responsibility of **helping our members advance in their profession to achieve their goals as well as support IEEE’s mission.**

Membership development not only supports the members but also increases the breadth of the member network, provides a larger pool of volunteers, impacts your Section’s finances and is needed to sustain the future of IEEE membership.

What is the Membership Development Chair’s Role?

It is in your Section’s best interest to ensure someone has been appointed to the Membership Development Chair (MD Chair) Role. The main responsibility of this role is to shepherd the activities pertaining to membership recruitment and retention in order to deliver an excellent member experience. This person will work closely with their Section Chair, Sub-Committees within their Section and IEEE Membership Marketing Specialist (staff) assigned to their particular Region, to design and execute a membership plan for a given year.

The keys to this role include:

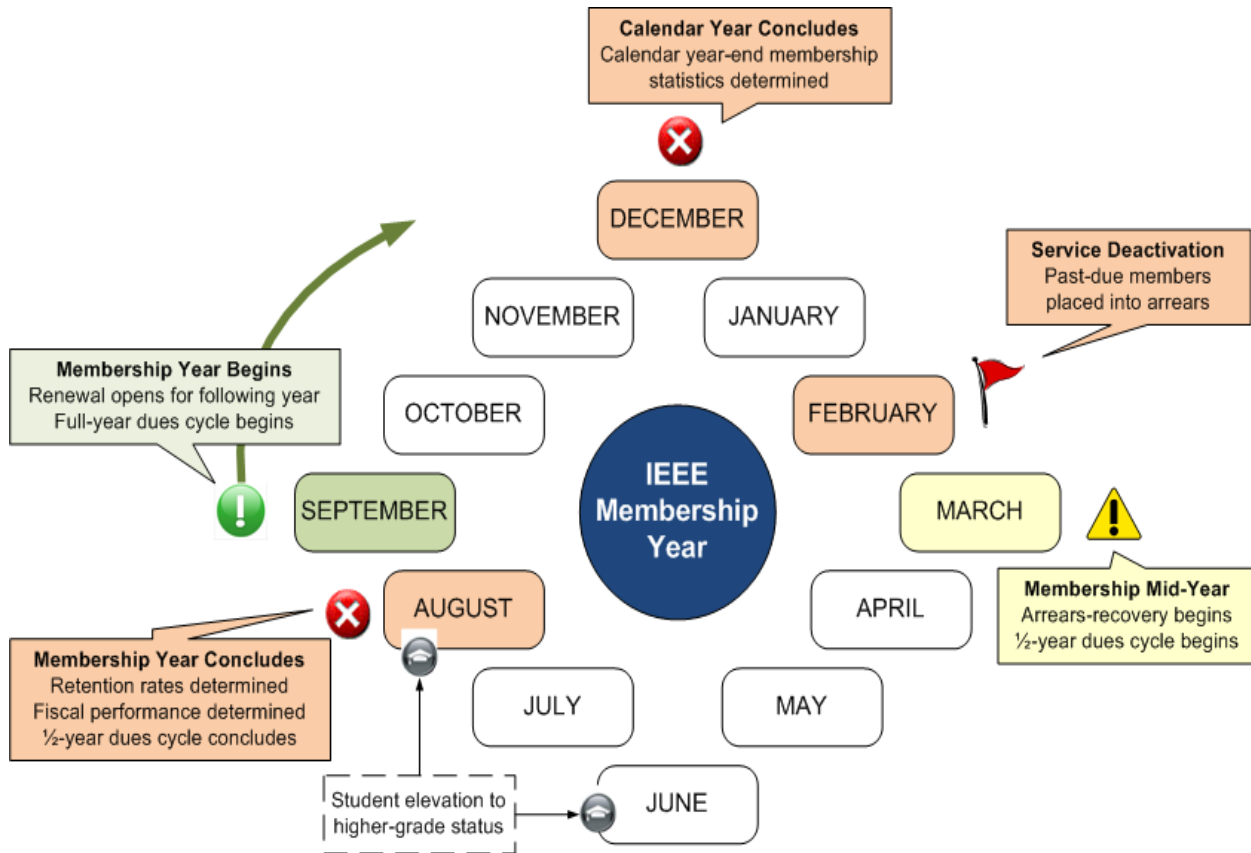
- Being a “champion” of IEEE
- Having a passion for:
 - Serving the members by understanding what they want/need
 - Partnering with the various sub-groups within their Section to deliver a better member experience
 - Driving member engagement within the Section on both a short and long term basis
 - Interested in networking/relationship building with within IEEE and externally
- Understanding that there are a number of development/engagement opportunities already available that you can leverage in your efforts such as:
 - IEEE Events & Conferences
 - Sub-Committee activities/meetings



As a Membership Development officer, IEEE will support you in these activities. This workbook was designed to help you with your MD planning. It outlines a number of activities and programs based around the MD Calendar that will allow you to synchronize your local membership development activities with both the regional and national MD efforts.

IEEE's Membership Development Cycle

At IEEE, the membership year is based on a calendar year starting in January and ending in December. For Membership Development however, there is a separate calendar based on a twelve month cycle that starts at the beginning of September and ends the following August – a full four months earlier than the beginning of a membership year. As a volunteer for your Section, it is critical to coordinate your efforts with the MD Cycle.



Basics of Membership Planning

At a minimum, each Section should be mapping out their calendar of events and conducting monthly outreaches with messages tailored to your members' interests. There are 3 main groups of members to focus on:

New Members	Prospective Members	Renewing members
Welcome them to the Section	Invite prospects to join	Communicate Section activities
Inform them of upcoming events	Reach out to inactive members	Emphasize the value of membership
Encourage them to attend New Member Orientation		

Getting Started Checklist

To jump-start your IEEE membership development planning, here is a quick checklist of resources for you to read, review and understand.

Pre-Planning Activities	COMPLETED
Review the Membership Development Chair Training materials at:	
www.ieee.org/md - There is a PowerPoint Training Presentation under the “Membership Development Key Resources” section	
IEEE Center for Leadership Excellence – www.ieee.org/cle	
Get to know your resources within IEEE:	
Membership Development Portal: www.ieee.org/md – This site is dedicated to providing you with all the tools, templates, links and resources necessary for membership development.	
Membership Development Reporting:	
Section Vitality Dashboard: www.ieee.org/vitalitydb Training for the Vitality Dashboard is available via this page.	
Monthly Membership Development Report for Your Region: Contact your Region MD chair or IEEE MD Support Specialist for latest report	
Attend the Monthly Membership Development Webcast An invite is sent monthly. If you are not receiving it, contact your staff support person	
Know your Section and Membership	
IEEE Meeting Resources: These two sites will help you find IEEE meetings and events www.ieee.org/conferences meetings.vtools.ieee.org	
IEEE Member Interests Data: Pre-defined queries in SAMIEEE	
Promotional Tools and Resources	
IEEE Branding Resources – Videos, templates , logos etc https://www.ieee.org/about/toolkit/index.html	
IEEE Promotional Library: Warehouse of ads for use in print and web https://www.ieee.org/about/volunteers/promo_library/promo_library_index.html	
IEEE.tv – Resource for videos. Specifically check out the IEEE Experience Channel https://ieeetv.ieee.org/channels/ieee-experience	
IEEE Membership Development Kit – Contains promotional collateral for you to use at meetings and events to promote IEEE. www.ieee.org/mdsupplies	
Engage your IEEE Volunteer Support Liaison. Pay attention to their monthly messages which contain tips and announcements for programs that benefit you and your members.	

Workbook Activities

Membership Development is not a one-size-fits-all proposition. Every Section has its unique strengths, weaknesses and obstacles. Sometimes it is hard to think of “different” ideas for your Section. The concepts outlined throughout the rest of this document will help you toward building your local MD plan.

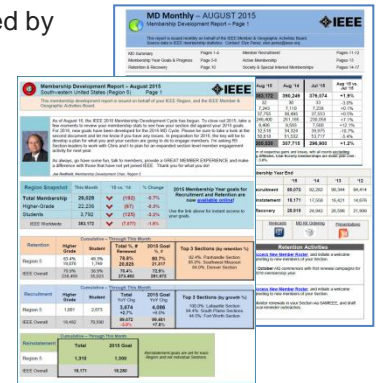
HELPFUL TIP: The MD Planning Workbook should be treated as a living document. The plan should be revisited with your Section ExCom regularly to ensure it is kept up to date.

Get to Know the Available Reporting

The logical place to start would be to get to know the available reporting. There are a number of queries and reports available that will help you gain a better understanding of your membership. But which ones should you focus on for MD planning? Outlined below are four resources to get you started.

The first two resources to familiarize yourself with are the monthly reports provided by IEEE staff:

- Membership Monthly Global Report
 - Sent by the Member Market Development Manager on behalf of MGA and the MRRC.
 - Contains a global view of IEEE’s health as it pertains to membership growth in the three channels of recruitment, renewal and recovery.
- Membership Monthly Region Report
 - Sent by your Region MD chair or Member Market Development staff liaison on behalf of MGA and the MRRC.
 - Contains Region and Section Level data for total membership, renewal and recruitment.



HELPFUL TIP: If you are not receiving these reports, please contact your Region MD chair or staff liaison to be added to the distribution lists.



The third resource will be the [Section Vitality Dashboard](#). This dashboard is comprised of a number of pre-defined SAMIEEE queries formatted into an easy to use interface. From the Dashboard you can generate lists and reports including but not limited to:

- Counts by member grade for Section
- Counts by Society Memberships
- Contact lists for Active, Inactive and New Members
- Section Officer lists

For full details and a tutorial, visit the Section Vitality Dashboard website (www.ieee.org/vitalitydb).

The fourth resource is SAMEEE. This is IEEE’s reporting portal which allows the user to query member data. As mentioned, many of the pre-defined queries are set up as part of the dashboard. SAMIEEE is the back end for the dashboard, and enables you to customize queries or create your own ad-hoc queries. SAMIEEE can be accessed via the following link, www.ieee.org/samieee which also contains a number of resource guides, training materials, etc. These four reporting tools will be essential to your membership planning efforts for a variety of reasons from gauging how your membership is growing to pulling lists for your communication efforts. For now, let’s take a moment to fill in the tables on the following page.

Your Section's Membership Statistics

These tables are designed to give you an idea of where your Section has been and where you want to go. The information needed for these can be found in your Membership Monthly Region Report.

Section Details	Overall Membership Statistics		
	2015	2014	% Change
Higher Grade			
Students			
Total			

<u>Recruitment</u>	2015	2014	# Change	% Change	2015 Goal
Total Members					

<u>Retention</u>	2015					
	Oppty	Renewals	Renewal Rate	Non-Renewals	Goal	% to Goal
Higher Grade						
Students						
Total						

2016 Section Goals	
Recruitment	
Retention	

Get to Know your Region/Section/Affinity Groups/Chapters

Now that we have an idea of where we are and where we are going from a numbers perspective, you'll want to take some time to get to know your Local Section, Affinity Groups and Chapters. For the following exercises, we're most interested in learning more about what is currently being offered to the members in your area. More than likely, there are a number of programs and events in place that you might be able to leverage in your MD efforts. In some cases, you might find that there are areas of member interest that are not being addressed which present opportunities to expand your local Section's offerings.


At the very least, you will want to try and find answers to the following questions:

- What programs and activities have been run in the past?
- What programs and activities are being planned for the future?
- Any details on who ran the programs/events and how they did it.
- Which were the ones that worked the best? Why?
- Which didn't work out so well? Why?
- Don't just focus on your Section. Reach out to your Region, Affinity Groups and Chapters
 - Run a report of Section Officers to identify local Affinity Group leaders
 - If there AREN'T any leaders, this could be an opportunity to start a new group.
 - If there is a contact,
 - Reach out to see if they could use some local support.
 - Explore opportunities to partner on events and meetings.
 - Use this information to continue working through this planning document.
 - Generate a list of what is going on locally.
 - Map out a calendar of future meetings and events (see the Customizable Membership Development Plan for an easy to use format).
 - Ensure attendees have the option to renew or join IEEE at all meetings and events.



In the following pages, we have outlined a number of activities that you can undertake to help gather and organize your thoughts. They are:

- Activity: Making Your Section Zing
- SWOT Analysis
- Identifying meetings/events in your area

 **HELPFUL TIP:** Work with your Section's Executive Committee to allocate time on the meeting agenda to discuss member engagement and development. Although all of the following exercises can be done on your own, the best sources of information are your fellow volunteers. All of them have had experience in various capacities. They may be able to identify opportunities that you may not be aware of. Plus, it always helps to get buy in within the overall group as you will be working with them to execute your plans.

Activity: Making your Section Zing

This activity was originally presented by IEEE volunteer, Charles Lord of Region 3, at an IEEE-USA Annual Meeting. The activity has been adapted for the purposes of membership planning and can be used as a means to capture your notes and thoughts as you research your Section. The pages can also be replicated for use during other Region, Section or Affinity/Chapter meetings.

Our section’s best, most fun, most well-received events:

Great ideas I heard from others:

My IEEE TO-DO LIST

IDEA	PRIORITY	DO BY:

Notes:

MOST IMPORTANT THING I LEARNED THIS WEEKEND

SWOT Analysis

You may want to consider performing an analysis of the strengths, weaknesses, opportunities and threats your Section is faced with from both an internal and external perspective. This is also known as a S.W.O.T analysis. This analysis can be run from a number of different perspectives and views. The focus in this case should be on the factors that are impacting your Section's ability to engage and attract members. Once completed, the goal will be to create an achievable set of objectives/activities based on these factors. To aid in the process, we have included the simple chart below. We also have identified a resource which details this process:

<http://www.quickmba.com/strategy/swot/>

Section SWOT Analysis

Strengths	Weaknesses
Opportunities	Threats

Identifying Meetings/Events in Your Section

IEEE has a number of sites that can be used to identify any of the thousands of meetings being hosted under the IEEE umbrella. For the purposes of this analysis, we'll be using the following:

- [vTools Meetings](#) which houses all the reported meeting activity
- [IEEE Events and Conferences](#) which contains all of the events set up by IEEE's Events and Conferences Staff
- Both of these tools can be found in the [Section Vitality Dashboard](#)

By using these meeting finders in concert with the details learned from Making Your Section Zing and the SWOT Analysis, you can then map out a calendar of the local events already in place. All of these provide an opportunity to enhance the member experience as well as recruit/renew members. To assist you in this process, we have provided a calendar template that you can use to map out your year. The calendar template starts on page 14.

Get to Know Your Members

The focus of all membership development/engagement activities should be the member. Moving forward, you should always be aware that **you play a pivotal role in making IEEE your members' professional home.** You are the frontline member contact point. You are planning what events, meetings, and projects are being executed. With that being said, you should always ask yourself "Are we offering what our members "value?"

So let's start with the basics. You need to be cognizant of the fact that the average member:

- Interacts locally through either a Technical Chapter or the Section itself
- Will participate in activities that provide some combination of the following:
 - Have practical applications to their current situation,
 - Benefit their community,
 - Provide a benefit to them individually whether it be in their career or their own personal interests.



With these points in mind, we have outlined a number of simple tasks and ideas designed to help you keep the focus on your members.

Member Interest Queries

The first task to undertake is to gather the available member interest data. At the time a person submits a membership application, a number of data points are collected that provide details into that person's particular interests. As volunteers, you have access to this data via SAMIEEE. A number of queries were developed to mine this data so that you don't have to create your own ad hoc queries. They are:

- (MD) Member Interest Profile – Publication Subscriptions
- (MD) Member Interest Profile – Society Membership Pivot
- (MD) Member Interest Profile – Tech Community Membership
- (MD) Member Interest Profile – Tech Council Membership
- (MD) Member Interest Profile – TIPS


This particular set of queries is located in the Membership Development pre-defined query set and pulls both counts and contact lists for each data point. The next step in the process is to go out to SAMIEEE (www.ieee.org/samieee) and run each report. You may want to print or export the data for reference later in this workbook.

Member Interest Survey

An optional task would be to execute a Section-specific Member Interest Survey to your active members. This is a great opportunity to get real time data. In addition, you can gauge your members' willingness to participate/volunteer.

To streamline the process, your staff support team has developed a Member Interest Survey template and housed it in [vTools Surveys](#) – IEEE's volunteer survey tool. Please note, that this is only a template and you can modify it to fit your particular needs. Simply navigate your web browser to <https://surveys.vtools.ieee.org/> and sign in using your IEEE account credentials.

Once in, click the Templates tab and select the Custom option at the bottom of the list. From the Custom options frame, select the template titled "IEEE Member Interest Survey". For further details on how to use vTools Surveys, select the Help icon at the top of the screen. The tool has a number of helpful tutorials and videos on how to use the functions and features.

 **HELPFUL TIP:** If you run a survey, be prepared to execute on the findings. There is nothing worse than polling your members and then ignoring their input.

Gap Analysis

Once all of the relevant member interest data is collected, you can perform a gap analysis between what is currently being offered in your Section and what your members are interested in. For those that are being served, congratulations! For those large groups for which there are no projects/events, they present member engagement opportunities.

For those newly identified groups of members, we suggest hosting an event specifically for them. The event should be similar to a focus group in which you will want to work with the members to figure out how to best serve the interest. In addition, you can gauge the level of interest these members might have for volunteering to get the projects off the ground.

Next Steps

From here, you now have a framework from which to manage your member engagement opportunities. An added benefit of this documentation is you have a succession plan to be handed down to incoming volunteers to work from. The key will be ensuring the plan is revisited frequently as plans do change over time.

With this in mind be sure to:

- Treat this as a living document – revisit and update at least monthly
- Continue to keep your Section ExCom, Affinity Groups and Chapters engaged in the planning

Membership Development Contacts

For a list of IEEE Volunteers and Staff responsible for membership development at IEEE, visit the following:

- IEEE Membership Development Staff
http://www.ieee.org/membership_services/membership/staff_contact.html
- Membership Recruitment & Recovery (MRR) Committee
http://www.ieee.org/about/volunteers/membership_development/region_md_officers.html

Customizable Membership Development Plan

As referenced in the previous section, this blank checklist can be used for planning Section specific activities.

<u>MONTH</u>	<u>Activity</u>	<u>Date Completed</u>	<u>Comments/questions</u>
<u>July</u>			
	<p>Speak with Section Chair to be included on the next Section Meeting Agenda with the Goal of:</p> <ul style="list-style-type: none"> - Working through SWOT Analysis - Learning about the Section's past Activities - Discuss upcoming events - Partnering with the rest of the section for MD opportunities <p>Be sure to discuss the idea of IEEE Day events with the Section leaders to prep for September planning.</p>		
<u>August</u>			
<u>September</u>			
9/1	<p>Start Planning IEEE Day Event(s) For more information visit www.ieeeday.org</p>		<p>IEEE Day is the day we recognize the first meeting of IEEE's founders. It is celebrated annually on the 1st Tuesday in October. Celebrations occur starting the Sunday before and end the Saturday after.</p>
<u>October</u>			
1st Week of October	IEEE Day Event		Be sure to register your event at www.ieee.org
1 st week of October	In conjunction with IEEE Day run a member drive.		There is a \$30 off new higher grade membership promotion; If your members make referrals during this time, they also get credit towards Member-Get-Member program.

<u>October</u>			
<u>November</u>			
<u>December</u>			
<u>January</u>			
<u>February</u>			

<u>March</u>			
<u>April</u>			
<u>May</u>			
<u>June</u>			

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