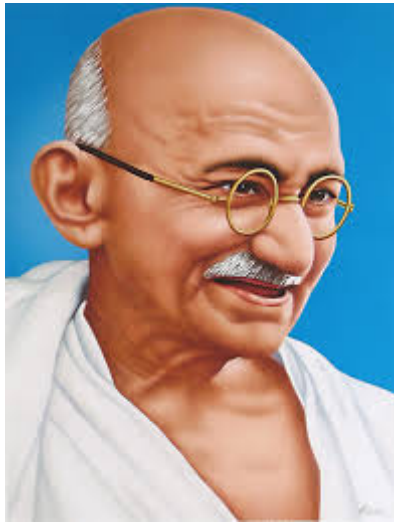


IEEE Volunteers Tools Training

Slides Written by Chris Wright, IEEE Staff

Presented by Bill Marshall, Atlanta Section





“A customer is the most important visitor on our premises. He is not dependent on us. We are dependent on him. He is not an interruption to our work. He is the purpose of it. He is not an outsider in our business. He is part of it. We are not doing him a favor by serving him. He is doing us a favor by giving us an opportunity to do so.”

- Mahatma Gandhi

Objectives for This Session

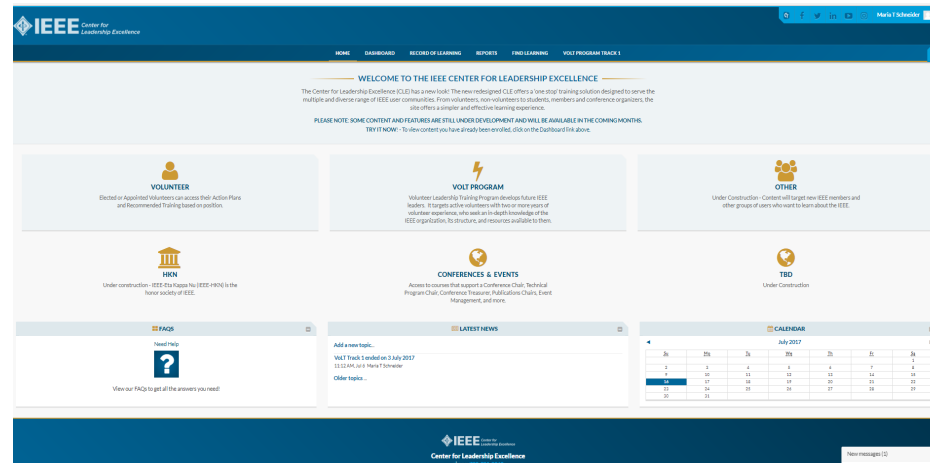
Region 3 Section Support Committee Forum

- ▶ Review the tools and applications available to IEEE volunteer
- ▶ Gain a basic understanding of:
 - What each tool is for
 - Why volunteers should consider using them



IEEE Center for Leadership Excellence

ieee-elearning.org/CLE/




- ▶ Simple to use, self-paced
- ▶ Offers help to Volunteers in their new role with ACTION PLANS!
- ▶ Access with IEEE Account
- ▶ Please note: Content is updated regularly – Check back often!



Monthly Region Membership Reports

IEEE Membership Development Report - January 2019
Southwestern United States (Region 5)
This report is issued monthly on behalf of your Region and the IEEE Member & Geographic Activities Board.



With service deactivation behind us (it happened this year on 23-Feb), it is now time to focus on two major activities. These are reinstatement of those members who did not renew and to promote the % year goals for new members. For deactivated members, you can easily reach out to them via [ePages](#) which shows all the exciting things your Section has going on and ask them to renew. For % year dues, the member opportunity starts 1-March. It helps to start planning now on how your Section will promote this to non-members at your meetings and events.

As always, go have some fun, talk to members, provide a GREAT MEMBER EXPERIENCE and make a difference with those that have not yet joined IEEE. Thank you for what you do!

Joe Redfield, Membership Development Chair, Region 5
redfield@ieee.org

Region Snapshot	This Month	'19 vs. '18	% Change	2018 Membership Year goals for Recruitment and Retention are available online .
Total Membership	25,792	▼ (253)	-1.0%	An overview of the goal development is on page 5. Individual Section goals begin on page 3.
Higher-Grade	21,596	▼ (229)	-1.0%	
Students	4,196	▼ (24)	-0.5%	
IEEE Worldwide	429,825	▲ 3,727	0.9%	

Retention	Cumulative - Through January 2019				Top 3 Sections (by retention %)
	Opportunity	# Renewed	% Renewed	% 2018 Goals	
Higher Grade	20,968	15,195	72.5%	73.8%	75.4%: SW Missouri Section
Student	2,857	799	28.0%	28.0%	74.4%: Lafayette Section
Total	23,825	15,994	67.1%	67.3%	73.7%: Pikes Peak Section
IEEE Worldwide	381,916	210,822	55.1%	55.3%	71.6%

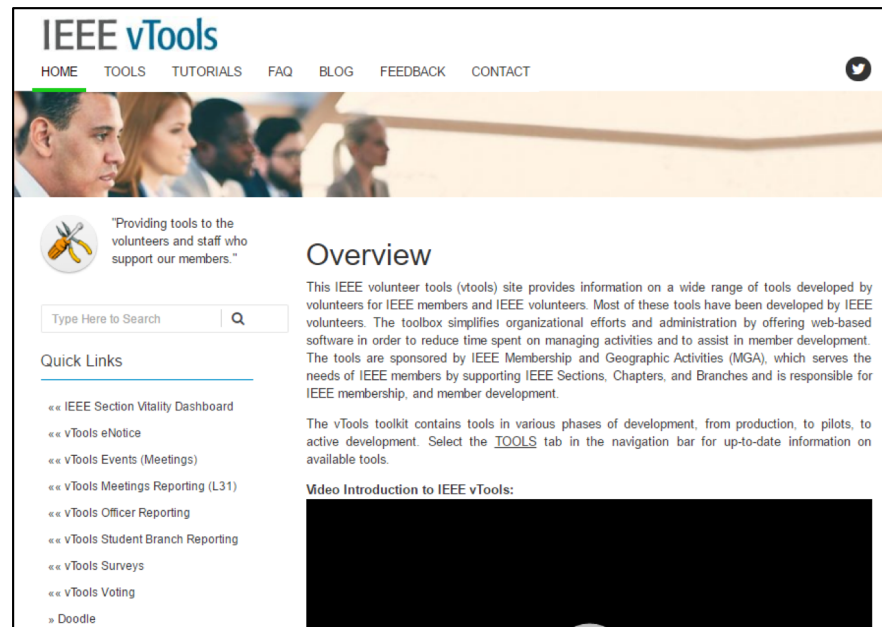
Recruitment	Cumulative - Through January 2019				Top 3 Sections (by growth %)
	2018	2019	YoY Change	2018 Goals	
Higher Grade	344	329	▼ 4.3%	4.3%	84.1%: Arkansas Section
Student	1,131	1,222	▲ 8.0%	8.0%	78.0%: SW Missouri Section
Total	1,475	1,551	▲ 5.1%	5.1%	64.0%: New Orleans Section
IEEE Worldwide	36,368	36,191	▼ 0.5%	99.910	2.2%

Reinstatement	Cumulative - Through This Month			2018 Goal	Reinstatement goals are set for each Region and not individual Sections.
	2018	2019	% Change		
Region 5	641	627	▼ 2.2%	1,138	
IEEE Overall	9,767	9,823	+0.6%	21,100	

- ▶ Monthly report sent by IEEE Staff and your Region's Membership Development Chair
- ▶ The report includes
 - Overall Region stats
 - Section level stats
 - Stats include counts of:
 - Total Active Members
 - Renewals
 - Recruits/new members
 - Helpful tips & resources
- ▶ Sections only need three lines of the Member Stats report



IEEE vTools – The Volunteer Toolbox



The screenshot shows the IEEE vTools website. At the top, there is a navigation bar with links for HOME, TOOLS, TUTORIALS, FAQ, BLOG, FEEDBACK, and CONTACT. Below the navigation bar is a header image of a group of people. The main content area features a quote: "Providing tools to the volunteers and staff who support our members." followed by an icon of a wrench and screwdriver. Below this is a search bar with the placeholder text "Type Here to Search" and a magnifying glass icon. To the left of the main content is a "Quick Links" section with a list of links: IEEE Section Vitality Dashboard, vTools eNotice, vTools Events (Meetings), vTools Meetings Reporting (L31), vTools Officer Reporting, vTools Student Branch Reporting, vTools Surveys, vTools Voting, and Doodle. The main content area has an "Overview" section with a paragraph of text and a "Video Introduction to IEEE vTools:" section with a black video player.

► vtools.ieee.org



vTools Officer Reporting

- ▶ Manage your Section's Volunteer Roster
- ▶ Most Section Executive Committee Volunteers have Access
- ▶ Info you will need
 - Volunteer's Name
 - Volunteer's Member Number
 - Volunteer's Role
- ▶ Can also manage your Section's website URL here
- ▶ officers.vtools.ieee.org

The screenshot shows the IEEE vTools Officer Reporting web application. The browser address bar displays https://officers.vtools.ieee.org/tego_/reports. The page header includes the IEEE logo and the text "Welcome, CHARLES LORD". The navigation menu contains "VTOLS", "MANAGE OFFICERS", "OFFICER LOGS", "MANAGE URL", "CONTACT STAFF", and "ABOUT". The main content area is titled "MANAGE OFFICERS" and includes a sub-header "Unit: North Carolina Council (R301)" with a "Select another OU to manage" button. Below this is an "Instructions" section with the text "Please make changes for the officer positions for the selected organizational unit below." and a "(show more)" link. There are two buttons: "Add Officer" and "End Term". A table titled "Officer Positions" is displayed with a "Request a new officer position" link. The table has two columns: "Position Title" and "Current and Newly Elected Volunteers".

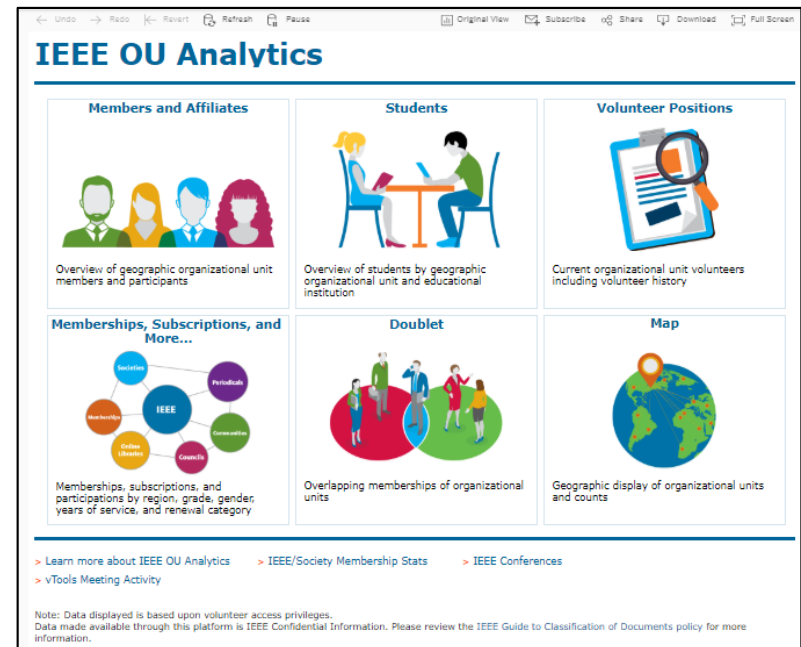
Position Title	Current and Newly Elected Volunteers
<input type="radio"/> Assistant	
<input type="radio"/> Assistant (eNotice Coordinator)	
<input type="radio"/> Awards & Recognition Committee Chair	
<input type="radio"/> Chair	CHARLES LORD



OU Analytics

Volunteer Reporting Resource

- ▶ OU Analytics
 - Based in a business information tool called Tableau
- ▶ Six (6) Dashboards available
 - Members & Affiliates
 - Memberships, Subscriptions and More
 - Students
 - Doublet
 - Volunteer Positions
 - Map
- ▶ For details, visit the [OU Analytics homepage](#)
- ▶ For questions: ouanalytics@ieee.org



eNotice

Self-service email system

- ▶ Can be sent same day without staff intervention
 - Allows user to target audiences
 - Member Grade
 - Membership Status
 - Affinity Groups
 - Etc.
- ▶ Real time status and mailing statistics
 - Provided on the eNotice dashboard.
- ▶ Suggestion: Send message to members introducing your new team
- ▶ enotice.vtools.ieee.org

The screenshot shows the 'Add eNotice' interface. It includes a 'Subject' field with a red error message: 'Required field, cannot be default value!'. The 'To:' field is selected with a dropdown menu showing 'R10329 - Princeton/Central Jersey Section' and a 'Search OUs:' input field. A red error message above it says 'At least one organization must be selected!'. Other fields include 'Membership Grades' (All IEEE Members), 'Membership Status' (Active), 'Schedule Reminder' (mm/dd/yyyy), 'Privacy' (Private Mailing), and 'Attachments' (Choose Files). On the right, there are fields for 'Send By' (11/21/2017), 'From (ieee.org email):' (enotice@ieee.org), 'From (name):' (IEEE eNotice), 'Reply to (email):' (cwiee14@gmail.com), 'Reply to (name):' (Christopher Wright), and 'Priority' (Normal). At the bottom, there is a 'Special Requests' field and a 'Body' text area with a rich text editor toolbar. A red error message above the body area says 'Body is required, and cannot be the default value'. The interface also features a 'Cancel' button, a 'Send Express' button, and 'Submit' and 'Save' buttons.

vTools Events

The screenshot shows the IEEE vTools Events web application. At the top, there is a navigation bar with the IEEE logo and the text "IEEE vTools EVENTS". Below the navigation bar, there are links for "VTOOLS", "SEARCH EVENTS", "CREATE AN EVENT", "EVENTS REPORTING", "VIEW FEEDS", and "ABOUT". A message box states: "You have been signed out. Please close all browser windows to complete the process." The main content area is divided into three sections: "About vTools Events", a map, and "Recent Activity". The "About vTools Events" section contains text explaining the tool's purpose and a "Learn more about vTools Events" link. The map section shows a world map with several location pins and a search bar. The "Recent Activity" section lists several events, including "An Order of Magnitude Reduction in D...", "IEEE KSIT Elections 2017", "Towards building Internet of Vehicles", "IEEE KSIT Annual Valedictory Function", "Intelligent Decision Support Systems I...", "UMKC Robot Team Demonstration", "BIG DATA en el Sector Médico", and "2017 Summer Potluck Picnic!". At the bottom of the page, there are five icons representing different functions: "Search Events", "Create an Event", "Edit an Event", "Events Reporting", and "View Feeds".

▶ Event Planning Tool

- End-to-end event/meeting management tool
- Set up event
- Promote the event from the Tool
 - Send an eNotice
 - Posts to 3 IEEE Event Finders
- Connects to reporting for quick submission

▶ events.vtools.ieee.org



vTools Voting

- ▶ Step-by-step process for setting up elections of IEEE leaders
- ▶ For each candidate you need:
 - ▶ Member number
 - ▶ Picture (optional)
 - ▶ Bio and/or position statement
 - ▶ You will need to run an OU Analytics query to get the voters
- ▶ You will also need to fill out the form letter that gets sent out to the voters
- ▶ voting.vtools.ieee.org

The screenshot shows the IEEE vTools VOTING BALLOT DASHBOARD. The page header includes the IEEE logo and the text "Welcome, CHARLES LORD". The navigation menu contains "VTOOLS", "HOME", "VOTING", "BALLOT DASHBOARD", and "ABOUT". The main content area is titled "BALLOT DASHBOARD" and features a "New Ballot" section. This section has two dropdown menus: "Select organization" (currently showing "North Carolina Council") and "Choose template" (currently showing "Do not use template"). Below these menus is a "Create" button and a list of templates: "EXCOM", "Chair | Vice-Chair | Secy/Treas", and "Standards Committee". A note below the "Select organization" menu reads: "If you do not see the organizational unit listed, please contact us at vtools-voting@ieee.org for further assistance. Thank you." Below the "New Ballot" section is a "Ballots" section with two sub-sections: "Active Ballots" and "Saved Ballots", both of which currently show "There are no entries to display."



Remote Conferencing and Screencasting

- ▶ IEEE Sections Congress 2014 approved a recommendation to “build, promote, record, host and broadcast technical events at the local level and make them available to IEEE members”.
- ▶ **The tools we offer:**
- ▶ Tools for online meetings and recordings
 - [Google Hangouts](#) (no recording option)
 - [WebEx](#) (has recording option) (use “events” option)
 - [INXPO](#) (professional support available for a fee)
- ▶ Tools for offline recordings
 - [Camtasia](#) (Windows, Mac OS)
 - [QuickTime](#) (Mac OS)
 - [WebEx Recorder](#) (Windows)
- ▶ <http://sites.ieee.org/vtools/sc4-2/>



Share the IEEE Member Experience

- ▶ [IEEE.tv Membership Experience Channel](#)
- ▶ [Collabratec™](#) - IEEE's social platform for technology-minded professionals
- ▶ Follow us on Social Media:



@IEEEExp



facebook

IEEE Membership



Official IEEE MGA Volunteer Resources Site

mga.ieee.org

IEEE.org | IEEE Xplore Digital Library | IEEE Standards | IEEE Spectrum | More Sites Sign In

IEEE Member and Geographic Activities

Search Volunteer Content

Home News Awards Board & Committees Operations Volunteer Training Membership Development Contacts & Roster Resources

IEEE OU Analytics

Members and Affiliates Overview of geographic organizational unit members and participants	Students Overview of students by geographic organizational unit and educational institution	Volunteer Positions Current organizational unit volunteers including volunteer history
Memberships, Subscriptions, and More... Memberships, subscriptions, and	Doublet Overlapping memberships of organizational	Map Geographic display of organizational units

MGA Mission

- Ensure quality member opportunities for continuous engagement.

MGA Vision

Inspire, Enable, Empower and Engage Members of IEEE
For the purposes of:

- Fulfilling the mission of IEEE
- Enhancing the members growth and development through their life cycle
- Providing a professional home

[Learn more](#)

News

[IEEE-USA's New, Free November Audio Book for Members](#)
IEEE-USA's November New, Free Audio Book Encourages Young Children to Explore, Be Curious and Be Creative IEEE-USA's November new, free audio book...

[OU Analytics User Group](#)
The OU Analytics tool provides IEEE volunteer access to member data. It replaces SAMIEEE which was sunset in May. The OU Analytics User Group was...

[Student Activities Committee - Changes in the Operations Manual, Section 9.4](#)
Attn: Section Chairs, Section Student Activities Chairs, and Section Student Representatives As a result of the changes in the [MGA Operations Manual](#),...

Action Items & Deadlines

[Last Call for Nominations: IEEE MGA Awards, Recognizing Outstanding IEEE Volunteers](#)
You can help recognize the efforts of outstanding volunteers by nominating individuals for one of the prestigious [IEEE Member and Geographic](#)...

[CYBER ALERT: Be aware and protect IEEE from business emails scams](#)
There is a sharp increase in the sophistication and frequency of attempts to defraud executives, those with influence, and individuals with...

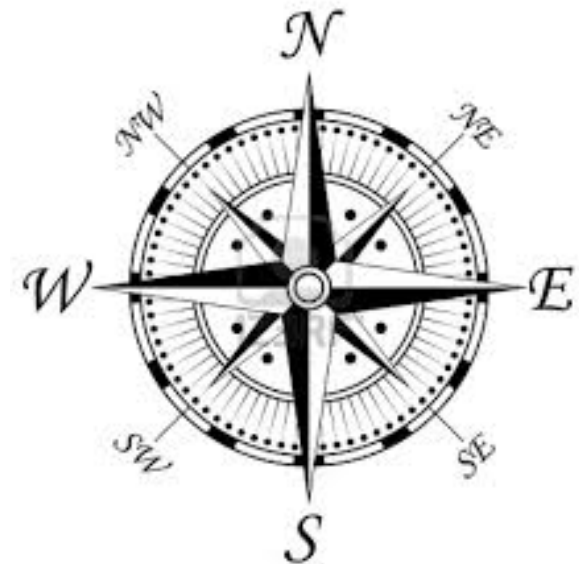
[2018 MGA Award Recipients: William W. Middleton, Outstanding Sections and Friend of IEEE MGA Awards](#)
The awards and recognition program of the Member and Geographic Activities Board

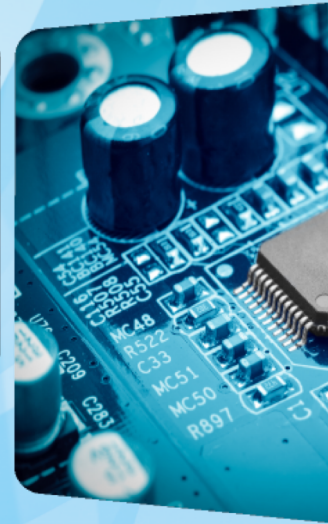
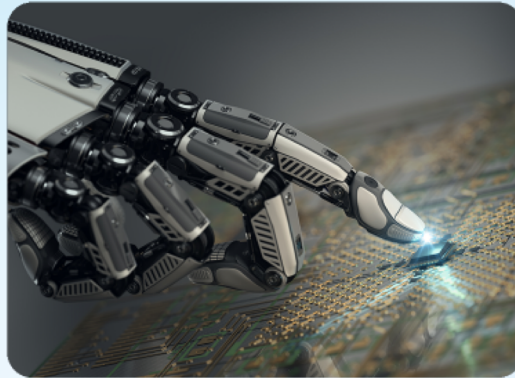


Moving Forward...

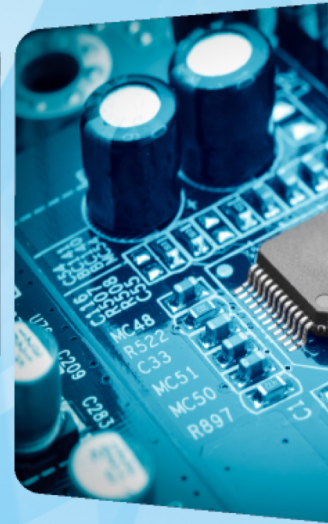
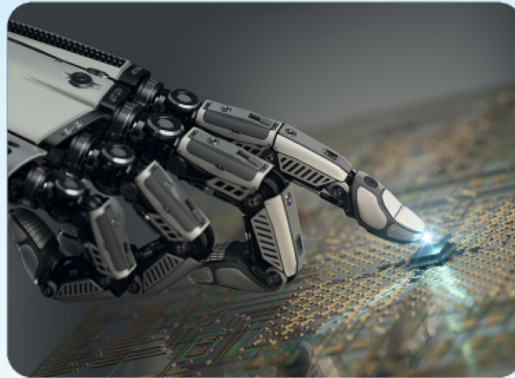
Checklist for the next month

- Review the MGA Volunteer Site
- Familiarize yourself with the tools in this presentation
- Complete the CLE Training for your position





Thank you!

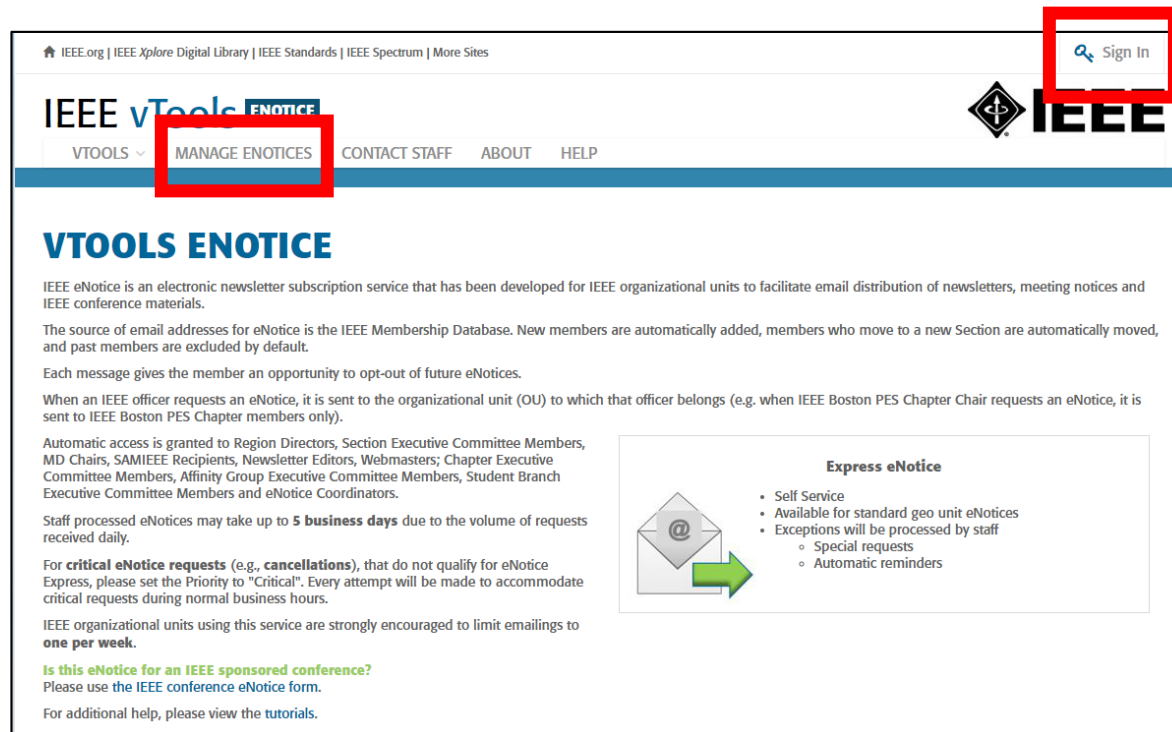


IEEE vTools – eNotice Overview



Features of eNotice

<https://enotice.vtools.ieee.org/>



IEEE.org | IEEE Xplore Digital Library | IEEE Standards | IEEE Spectrum | More Sites

IEEE vTools **ENOTICE**

VTOLS ▾ **MANAGE ENOTICES** CONTACT STAFF ABOUT HELP

VTTOOLS ENOTICE

IEEE eNotice is an electronic newsletter subscription service that has been developed for IEEE organizational units to facilitate email distribution of newsletters, meeting notices and IEEE conference materials.

The source of email addresses for eNotice is the IEEE Membership Database. New members are automatically added, members who move to a new Section are automatically moved, and past members are excluded by default.

Each message gives the member an opportunity to opt-out of future eNotices.

When an IEEE officer requests an eNotice, it is sent to the organizational unit (OU) to which that officer belongs (e.g. when IEEE Boston PES Chapter Chair requests an eNotice, it is sent to IEEE Boston PES Chapter members only).

Automatic access is granted to Region Directors, Section Executive Committee Members, MD Chairs, SAMIEEE Recipients, Newsletter Editors, Webmasters; Chapter Executive Committee Members, Affinity Group Executive Committee Members, Student Branch Executive Committee Members and eNotice Coordinators.


Staff processed eNotices may take up to **5 business days** due to the volume of requests received daily.

For **critical eNotice requests** (e.g., **cancellations**), that do not qualify for eNotice Express, please set the Priority to "Critical". Every attempt will be made to accommodate critical requests during normal business hours.

IEEE organizational units using this service are strongly encouraged to limit emailings to **one per week**.

Is this eNotice for an IEEE sponsored conference?
Please use the [IEEE conference eNotice form](#).

For additional help, please view the [tutorials](#).



Express eNotice

- Self Service
- Available for standard geo unit eNotices
- Exceptions will be processed by staff
 - Special requests
 - Automatic reminders



Features of eNotice

<https://enotice.vtools.ieee.org/>

IEEE.org | IEEE Xplore Digital Library | IEEE Standards | IEEE Spectrum | More Sites Sign Out

IEEE vTools **ENOTICE**

VTOLS ▾ MANAGE ENOTICES CONTACT STAFF ABOUT HELP Welcome, Christopher Wright

Create eNotice Search Select All/None

Draft Submitted Pending Sent Per Page 10 ▾

Canceled

1 2 3 4 5 6 Next > Last > Displaying eNotices 1 - 10 of 51 in total

Subject	Recipients	Status	Updated v	Send By	Reminder By	Priority	Type	
IEEE Workshop on Network Automation	Custom	Draft	22 Feb 2019 08:48 AM	25 Feb 2019		Normal		Manage
IEEE Workshop on Network Automation	R10329	Draft	19 Feb 2019 03:32 PM	20 Feb 2019		Normal		Manage
IEEE Workshop on Network Automation	Custom	Draft	19 Feb 2019 03:27 PM	20 Feb 2019		Normal		Manage
IEEE Workshop on Network Automation	R10329	Draft	13 Feb 2019 07:26 PM	15 Feb 2019		Normal		Manage
IEEE PCJS SIGNAL PROCESSING SOCIETY DISTINGUISHED LECTURER GUEST SPEAKER MEETING	R10329	Draft	13 Feb 2019 07:08 PM	15 Feb 2019		Normal		Manage
Post Deploy verification - delete me not	R10329	Draft	13 Feb 2019 02:09 PM	13 Feb 2019		Normal	Express	Manage
Copy of IEEE Workshop on Network Automation which will be held Feb 25th, 2019 in Piscataway, NJ	R1	Draft	12 Feb 2019 07:32 AM	13 Feb 2019		Normal		Manage



Features of eNotice

<https://enotice.vtools.ieee.org/>

IEEE.org | IEEE Xplore Digital Library | IEEE Standards | IEEE Spectrum | More Sites Sign Out

IEEE vTools **ENOTICE** IEEE
Welcome, Christopher Wright

VTOLS ▾ MANAGE ENOTICES CONTACT STAFF ABOUT HELP

New eNotice

Please fill out the information below to create a new eNotice. * Denotes a required field

BASIC INFO

Subject [?]

Priority Status

Send By ^{*}

Schedule Reminder

Privacy [?] Exclude from public feeds

Cancel Save **Submit** Send Express

RECIPIENTS

FROM

CONTENTS



Features of eNotice

<https://enotice.vtools.ieee.org/>

IEEE.org | IEEE Xplore Digital Library | IEEE Standards | IEEE Spectrum | More Sites Sign Out

IEEE vTools **ENOTICE** **IEEE**
Welcome, Christopher Wright

TOOLS ▾ MANAGE ENOTICES CONTACT STAFF ABOUT HELP

New eNotice

Please fill out the information below to create a new eNotice.

BASIC INFO * Denotes a required field

RECIPIENTS

Organizational Units ?

Select an OU to send to:

[Click here to display list of Organizational Units](#) -

Membership Status ?

Active
 Arrears

Membership Grades ?

Honorary
 Associate Members
 Members
 Senior Members
 Fellows
 Life Members
 Life Seniors
 Life Fellow
 Graduate Student Members
 Student Members

Include Society Affiliates

All IEEE members
Life members only
Higher grades only

Cancel Save **Submit** Send Express Next ▾



Features of eNotice

<https://enotice.vtools.ieee.org/>

IEEE.org | IEEE Xplore Digital Library | IEEE Standards | IEEE Spectrum | More Sites

Sign Out

IEEE vTools ENOTICE

VTOLS ▾ MANAGE ENOTICES CONTACT STAFF ABOUT HELP

Welcome, Christopher Wright

New eNotice

Please fill out the information below to create a new eNotice.

BASIC INFO * Denotes a required field

RECIPIENTS

Organizational Units * ?

Select an OU to send to:

- R1 - Northeastern USA - Region 1
- R103 - Metro Sec. Act. Council
- R10329 - Princeton/Central Jersey Section **Child OUs**
- CH01098 - No Jersey/Prin-Ctr Jersey It Sections Chapter,JA34
- CH01101 - Princeton/Central Jersey Section Chapter,CAS04
- CH01102 - Princeton/Central Jersey Sec It Chap,CE08/COM19
- CH01103 - Princeton/Central Jersey Sec It Chptr,AP/ED/MTT
- CH01104 - Princeton/Central Jersey Section Chapter,C16
- CH01105 - Princeton/Central Jersey Section Chapter,EMB18

Membership Grades * ?

- Honorary
- Associate Members
- Members
- Senior Members
- Fellows
- Life Members
- Life Seniors
- Life Fellow
- Graduate Student Members
- Student Members

Include Society Affiliates

All IEEE members

Life members only

Higher grades only



Features of eNotice

<https://enotice.vtools.ieee.org/>

The screenshot shows the IEEE vTools eNotice web interface. At the top, there is a navigation bar with links for 'VTOOLS', 'MANAGE ENOTICES', 'CONTACT STAFF', 'ABOUT', and 'HELP'. The IEEE logo and the text 'Welcome, Christopher Wright' are on the right. The main heading is 'New eNotice' with a sub-instruction: 'Please fill out the information below to create a new eNotice.' Below this are sections for 'BASIC INFO' and 'RECIPIENTS'. The 'FROM' section is highlighted with a red border and contains four input fields: 'From (@ieee.org email) *', 'From (name)', 'Reply to (email) *', and 'Reply to (name)'. The 'From' field contains 'princetonsection@ieee.org' and has a link to 'Sign up for an ieee.org email account'. The 'From (name)' field contains 'Section Chair'. The 'Reply to (email)' field contains 'princetonsection@ieee.org'. The 'Reply to (name)' field contains 'Section Chair'. At the bottom of the form are buttons for 'Cancel', 'Save', 'Submit', 'Send Express', and 'Next'.



Features of eNotice

<https://enotice.vtools.ieee.org/>

IEEE.org | IEEE Xplore Digital Library | IEEE Standards | IEEE Spectrum | More Sites Sign Out

IEEE vTools ENOTICE IEEE
Welcome, Christopher Wright

TOOLS ▾ MANAGE ENOTICES CONTACT STAFF ABOUT HELP

New eNotice

Please fill out the information below to create a new eNotice.

BASIC INFO * Denotes a required field

RECIPIENTS

FROM

CONTENTS

Body ?

File Edit View Table Tools

Formats 11pt

Dear **INSERT_FIRST_NAME INSERT_LAST_NAME**,

My name is Bob and I'm a volunteer for IEEE's Princeton NJ area

- I'd like to introduce myself and tell you about all the great
- Technical Talks on Robots
- A Young Professional Meet Up a Buffalo Wild Wings
- Planning discussion for local K-12 STEM Events

If you are interested, please reach out to me or check out our w

Thanks!
Bob
bob@ieee.org

Personalization ▾

- First Name
- Last Name
- Email Address
- Member Grade
- Member Section
- Member Status



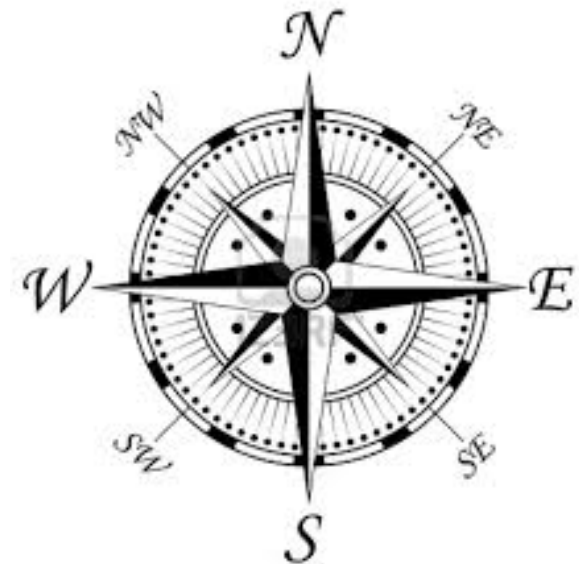
Best Practices for Sending eNotices

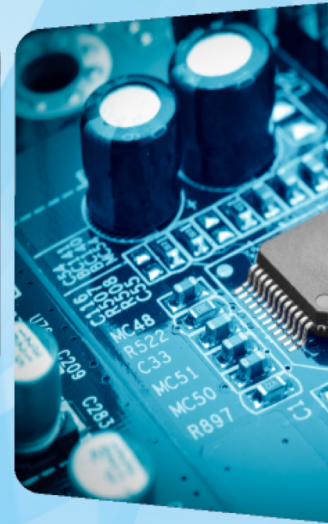
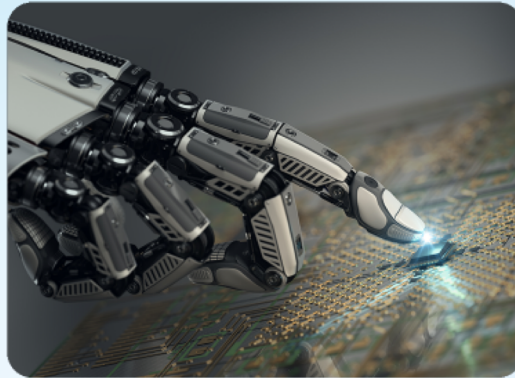
- ▶ Start with a basic outline of what you want to say. Ideas include:
 - Introductions – who is sending the message
 - Upcoming events
 - Announcements
- ▶ Use the outline to create customized messages based on the audience
- ▶ Create a repository of messages
- ▶ Need help getting started? Use the templates on the [IEEE Membership Development page](#)

Moving Forward...

Checklist for the next month

- Use eNotice to contact your members with a personalized message
- Use the Best Practices to communicate with your members more efficiently





Thank you! - Discussion