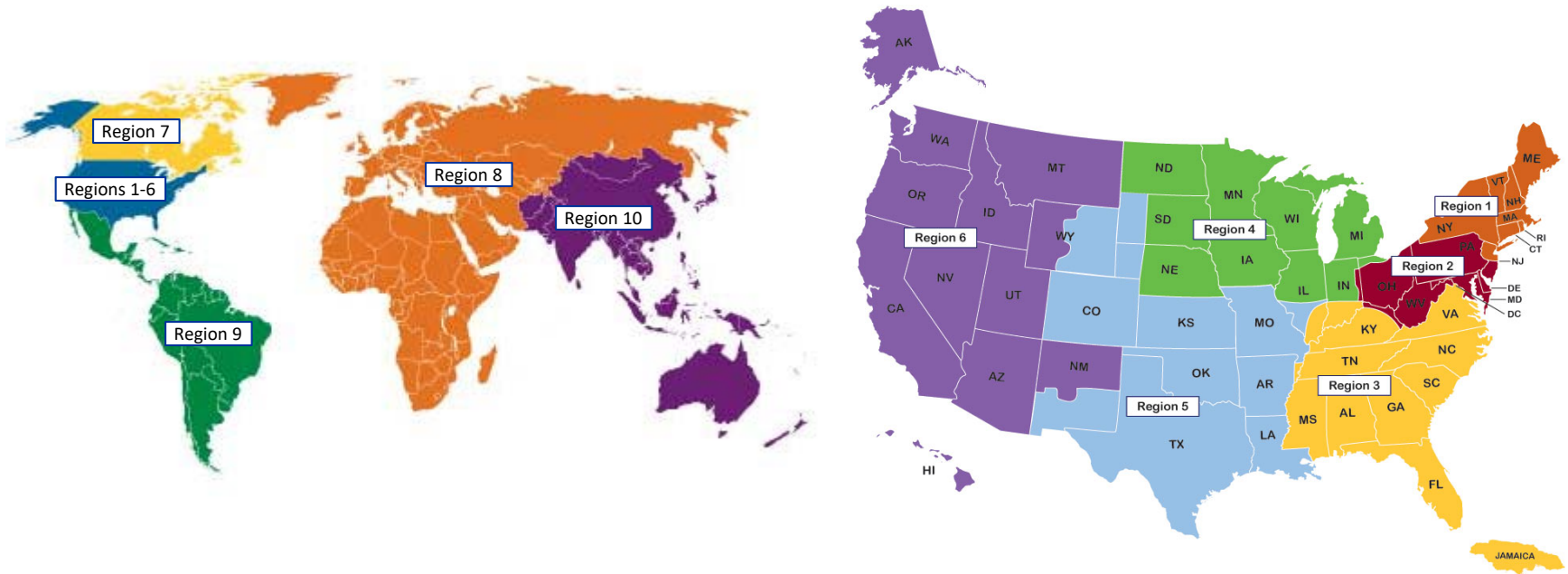


IEEE Region 3 Student Branch Leadership Training Workshop Fall 2016



Welcome and Introductions

Fred Orland

Introductions

Workshop Leaders

- Fred Orland (Western NC Section Chair)
- Jim Corr (NC Council Administrative Chair and Webmaster, Western NC Section Membership Development Chair, Awards and Recognition Chair)
- Charles Lord (NC Council Chair and SoutheastCon 2017 Chair)
- Pat Donohoe (R3 Student Activities Chair)
- Rachel Wilson (R3 Student Activities Vice-Chair)
- Stephen Moyer (Past UNCA Student Branch Chair)

Introductions

Workshop Participants

- Name
- Student Branch and/or Section
- IEEE Position
- Why did you join IEEE?

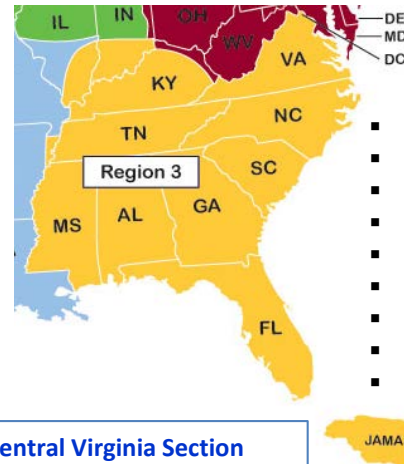
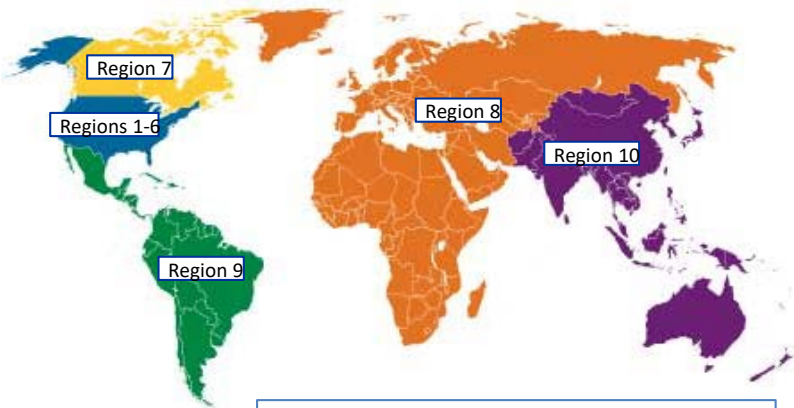
Workshop Goals

- Each Student Branch will leave the workshop knowing what is necessary to operate a successful IEEE Student Branch.
- Each Student Branch will develop a focused set of goals, a realistic budget, and the overall branch plan for the year.

IEEE – The Big Picture

Pat Donohoe

IEEE Organization



Region 3

- Area 1 – Virginia Council
- Area 2 – North Carolina Council
- Area 3 – Georgia
- Area 4 – Florida Council
- Area 5 – Tennessee Council, (AR)
- Area 6 – Alabama, Mississippi
- Area 7 – South Carolina Council
- Area 8 – Kentucky, (IN), (IL)
- Area 9 – Jamaica

Virginia Mountain Section

- Southwest Virginia Community College
- Virginia Military Institute
- Virginia Tech
- Virginia Western Community College

Central Virginia Section

- James Madison University
- Liberty University
- University of Virginia

Tri-Cities Section

- East Tennessee State University
- Northeast State Tech Comm. College

Hampton Roads Section

- ECPI College of Technology
- Hampton University
- Norfolk State University
- Old Dominion University

Western North Carolina Section

- Caldwell Comm. Coll. & Tech Inst.
- University of North Carolina - Asheville
- Western Carolina University

Richmond Section

- Virginia Commonwealth University
- Virginia State University

Eastern North Carolina Section

- Duke University
- East Carolina University
- Elizabeth City State University
- Fayetteville Technical Institute
- North Carolina State University
- University of North Carolina – Chapel Hill
- Wake Technical College

Charlotte Section

- Central Piedmont Community College
- Gaston College
- University of North Carolina - Charlotte

Central North Carolina Section

- Guilford Technical Community College
- North Carolina A&T State University

Section - Student Branch Connection

- Student Branch members need to see the broad spectrum of IEEE membership – the local IEEE Section can play a key role
 - Industry/Government/Academia
 - Technical/Professional
 - Career Stage/Demographic
 - Volunteer Opportunities
 - Local → Global
- Sections must have **current** contact info for their Student Branch leaders (Branch officers, Branch Counselor) in order to stay connected.
- Student Branch members need to feel like they are a valued part of the local Section.

Student Branch Administration

Stephen Moyer

Student Branch Administration

- Student Branch Officers
 - Chair
 - Vice-Chair
 - Secretary
 - Treasurer
- Branch Counselor
- Branch Mentor
- Other Student Volunteers
(Committees - Program, Membership,
Publicity, Finance, other)

Student Branch Chair

- Serves as the Executive Officer of the Student Branch.
- Manages the general operations of the Branch.
- Presides at all meetings of the Branch.
- Appoints committee chairs.
- Involved in “forward planning” for the Branch.
- Prepares necessary reports for IEEE Student Services.
- Arranges for election of new Officers before leaving office.
- Communicates frequently with other Officers.
- Works with Branch Counselor in dealings with the Department and Faculty and local IEEE Section.

Student Branch Vice-Chair

- Serves as the junior Executive Officer of the Student Branch.
- Chairs the Program or Membership Committee.
- Monitors the progress of Branch programs.
- Fills in for the Student Branch Chair as required.
- At some Branches, automatically becomes Chair next year.

Student Branch Secretary

- Keeps detailed records of all Branch meetings and activities.
- Carries out all necessary communications of the Branch, including the filing of reports with IEEE Headquarters.
- Posts a calendar of events to keep all members informed of Branch activities.
- Ensures that all Branch activities are conducted under the provisions of the current Branch Constitution and IEEE Bylaws.
- Arranges for orderly transfer of all Branch records to incoming Secretary.

Student Branch Treasurer

- Responsible for ensuring the Branch's finances are in order.
- Deposits all monies received promptly in the Student Branch account.
- Prepares a budget at the start of the school (or fiscal) year.
- Prepares end-of-year Financial Statements.
- Chairs the Fundraising Committee.
- Co-signing Officer (jointly with the Student Branch Chair).
- Arranges for orderly transfer of all accounts and records to incoming Treasurer.

Student Branch Counselor

- Faculty member, active in the IEEE, who serves as an advisor to the Branch and its Officers.
- Appointed by the local Section Chair, upon the recommendation of the Student members and the Regional Student Activities Chair (RSAC).
- Normal term of appointment (or re-appointment) is two years.
- Provides a sense of continuity to the Branch.
- Informs other faculty members of Branch activities.
- Promotes student awareness of awards, contests and membership benefits.
- Helps the Branch establish Industrial contacts and works closely with the Branch Officers and the Branch Mentor.

Branch Mentor

- Designed to maximize the interaction between the Student Branch and the local Section.
- Branch Mentor must be from Industry.
- Appointed by the local Section Chair, in consultation with the Branch.
- A recent graduate with firsthand experience in Student Branch operations is an ideal candidate.
- Meets regularly with the Branch members and the Branch Counselor.
- Assists the Branch to develop effective programs.
- Provides a bridge between the Branch and the local Section.
- Position is optional but can help Branches stay connected.

Student Branch Operation and Goals

Pat Donohoe

IEEE Volunteerism

Most if not all the people you will work with on IEEE activities are volunteers.

- Be respectful of them and their time
- Make them feel their contributions are important
- Make sure they get recognition
- Thank them for their participation
- Give them titles related to activities
- Seek and get commitments
- Make sure they feel they have input to the process

Student Branch Goals?

- More or fewer meetings; better meetings
- Inform members of opportunities
 - Jobs/internships/scholarships/awards/etc
- Social events for members
- Recruitment of new members
 - Undergraduate students/graduate students/freshmen-sophomores
- Technical/non-technical skills for students
- Engage students in SoutheastCon competitions
 - Hardware/software/ethics/website/t-shirt
- Inform students of continuing IEEE involvement after graduation
 - Sections/Young Professionals/technical societies/volunteering
- Cater to all students of the branch, not only those that attend SoutheastCon
- Organize common-interest meetings with other technical/engineering societies
- Keep members up-to-date with current technology
- Community service and STEM outreach
- Inter-disciplinary activities on campus (non-engineers)

Student Branch Operations

Design a varied and interesting schedule of events/activities to **engage** current student members and **recruit** new student members.

Events and Activities (Examples)

- Faculty member presentations on research topics (labs, research centers)
- Plant tours
- Presentations by a companies recruiting on campus
- IEEEExtreme
- Attending a local IEEE Section meeting
- SPAx (Student Professional Awareness activities)
- Local community service activity (speaking at local schools, host students on campus, Habitat for Humanity, etc.)
- SoutheastCon student competitions
- Joint meetings with other organizations (ASME, AIChE, WIE, EWB, etc.)
- Social events (welcome back/end-of-year picnic, game night, etc.)
- Other (be innovative)

Student Branch Operations

Design a varied and interesting schedule of events/activities to **engage** current student members and **recruit** new student members.

Events and Activities (Other)

-
-
-
-
-

Student Branch Operations – IEEE Resources

General information for IEEE Student Members

<http://www.ieee.org/students>

(Benefits of membership, news and resources, student branch information, etc.)

Branch Leader News

http://www.ieee.org/membership_services/membership/students/leaders.html

(Leadership training info, SAMIEEE, contacts, etc.)

Student Awards and Other Opportunities

http://www.ieee.org/membership_services/membership/students/awards/index.html

(Student awards and competitions, scholarships, grants, fellowships, etc.)

IEEE Region 3 (Student Activities)

<http://ewh.ieee.org/reg/3/student.html>

(Student activities specific to Region 3)

Student Branch Reporting Requirements

Only two reports are required by IEEE each year (both are submitted online)

Student Branch Officer Reporting (<https://officers.vtools.ieee.org/>)

- Submitted in a timely fashion after officer elections.
- Includes reporting of Branch Counselor.
- Must be submitted each year or offices will be listed as vacant at IEEE.

Student Branch Activity Report (<https://sbr.vtools.ieee.org/>)

- Due 1 May each year or two months after the academic year ends.
- Report of Branch activities for past year.
- Submission of the Student Branch Activity Report qualifies the branch for a rebate of \$2.00 per Branch member.
- Student Branches will receive a combined payment of the Student Branch rebate/allotment. The allotment is \$50 for Branches with 49 or fewer members or \$100 for Student Branches with 50 or more members (based on membership statistics as of 31 December).

Communications and Fundraising

Stephen Moyer

Student Branch Communications/Visibility

Student Branch Website

- There should be an IEEE presence on the University website
- A well-designed website can be (1) an effective resource tool [announcements, event info, links, contact info, etc.] (2) an effective repository of information [meeting minutes, reports, history of student branch, officers, award winners, etc.]
- Not everyone uses Facebook!

Student Branch Facebook Page

- Preferred mode of communication for most students
- Not everyone uses Facebook!

Facebook Page – IEEE Region 3 Students

This is what your Page looks like to a visitor. [Switch back to your view to manage this Page.](#)

IEEE
Advancing Technology
for Humanity

IEEE Region 3 Students
@IEEEStudentsRegion3

Home
About
Photos
Likes
Events
Notes
Posts

Create a Page

Like Message Save More

Status Photo / Video

Write something on this Page...

IEEE Region 3 Students
Yesterday at 9:30am · 🌐

Non-Profit Organization

Search for posts on this Page

738 people like this
Rodney Radford and 9 other friends

<https://www.facebook.com/IEEEStudentsRegion3>

Student Branch Fundraising

There are 4 different kinds of money you may need to raise:

- *Operating money* - for continual expenses.
- *Seed money* - an “advance” for an event.
- *Subsidy money* - to reduce the cost for members.
- *Capital money* - to buy things.

Most fundraising ideas center on selling stuff (coffee, t-shirts, lab parts, etc.), providing services (car wash, parking cars, etc.), or soliciting donations (student government, industry, IEEE Section, etc.).

- Brainstorming is a good way to think of ideas.
- Need to be aware of University fundraising constraints
- Need to be careful not to tarnish the image of engineering.

Student Branch Fundraising

Money Sources (\$\$ and/or in-kind contributions):

- Branch bank account
- Money from rebate/allotment
- Fundraising events or activities
- School
 - Department Head, Dean, Student's Association, Engineering Student's Association
- IEEE
 - Local Section, Region
 - For S-PAx: IEEE USA SPAx and MGA/SAC/SPAA
- Local Industry

Student Branch Fundraising

When asking for money....

- Donor must have money to give (not everyone does!)
- Put the request in writing and include a brief budget
- Convince them of the merits of your cause and how their involvement will help both you and them
- Show them that your proposal is well-thought out and that you are soliciting from others as well
- Give them time to make a decision and then follow-up

Introduction to VTools

Jim Corr

Lunch

The Section - Student Branch Connection

Pat Donohoe

What is an IEEE Section?

From the IEEE Bylaws:

A Section is the basic operating organizational unit of IEEE constituted by a minimum of 50 IEEE voting members and established with the approval of the MGA Board by petition of those who live/work in relatively close proximity to be served by activities that meet their needs and further the missions of IEEE.

What is an IEEE Student Branch?

From the IEEE Bylaws:

A Student Branch shall be an operating organizational unit of IEEE constituted by a minimum of twelve (12) IEEE Student Members or Graduate Student Members at a particular college, university, technical institute, or, in unusual circumstances attached to a Section, and established with approval of MGAB by petition to the Region concerned to fulfill the mission of IEEE.

The Section - Student Branch Connection

From the MGA Operations Manual:

It is recommended that every Section have a Section Student Representative (SSR), who is a voting member of the Section Committee, in Sections where there is at least one Student Branch.

A petition to form a Student Branch ... All signees shall belong to the Section under which the Student Branch will reside.

The appropriate Section Chair ... shall appoint the Counselor.

Section rebate ... US\$3 for each member of Member, Graduate Student Member, Student Member, or Associate Grade.

North Carolina Council

Eastern North Carolina Section

- Duke University
- East Carolina University
- Elizabeth City State University
- Fayetteville Technical Institute
- North Carolina State University
- University of North Carolina – Chapel Hill
- Wake Technical College

Central North Carolina Section

- Guilford Technical Community College
- North Carolina A&T State University

Western North Carolina Section

- Caldwell Community College & Tech Institute
- Western Carolina University

Charlotte Section

- Central Piedmont Community College
- Gaston College
- University of North Carolina at Charlotte

South Carolina Council

Central Savannah River Section

- Augusta Technical College

Coastal South Carolina Section

- The Citadel
- Horry-Georgetown Tech College
- Trident Technical College

Columbia Section

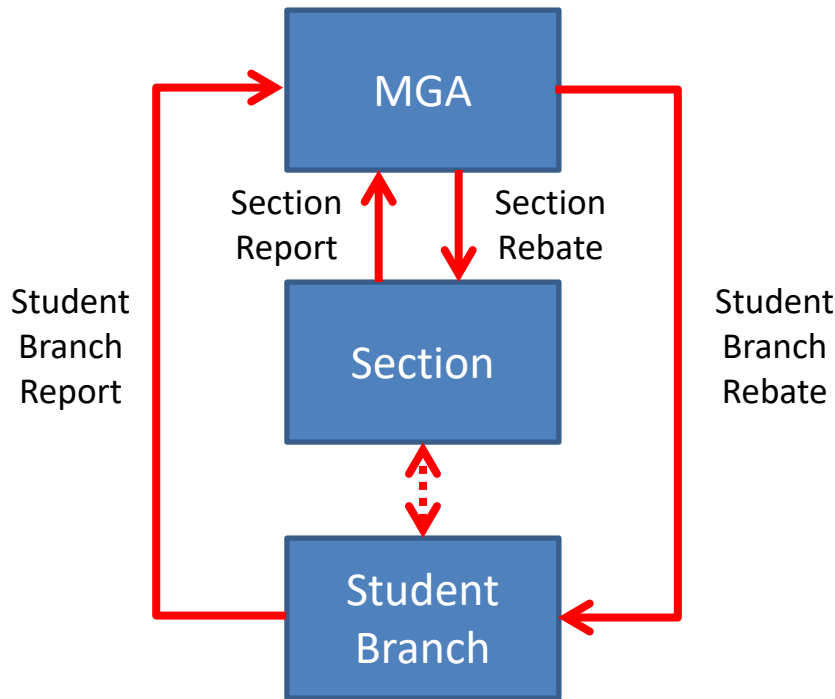
- University of South Carolina
- South Carolina State University
- Florence-Darlington Technical College

Piedmont Section

- Clemson University
- Bob Jones University

Importance of the Section - Student Branch Connection

Current Reporting/Rebate Model



A small number of Student Branches are actually utilizing the rebate system (~15% overall, ~13% in Region 3) which results in poor contact info and poor communications.

If (1) the Student Branch does not utilize the rebate system and (2) no interaction between the Section and the Student Branch exists the Student Branch is essentially cutoff from IEEE.

Importance of the Section - Student Branch Connection

- Sections must have **current** contact info for their Student Branch leaders (Branch officers, Branch Counselor) in order to stay connected.
- Student Branch members need to feel like they are a valued part of the local Section.
- Student Branch members need to see the broad spectrum of IEEE membership (Industry/Government/Academia). With no Section – Student Branch Connection, the only interaction of students with IEEE members may be with professors, and students see IEEE as purely an academic organization.

Importance of the Section - Student Branch Connection

- Sections should be aware of the student-based portion of the Section rebate, and invest accordingly in their Student Branches.
- The Section – Student Branch connection should be continuous (not intermittent) such that the Section is aware of all Student Branch activities and the Student Branch is aware of all Section activities.

Section - Student Branch Connection (Best Practices – Section Leadership)

- Invite the Student Branch Chair (or representative) for all of the Section's Student Branches to attend Section EXCOM meetings (whether you have a Section Student Representative, or not).
- Appoint a Section Student Activities Chair (EXCOM position). This person could be a Student Branch Counselor.

Section - Student Branch Connection (Best Practices – Student Branch Leadership)

- Appoint a Branch Mentor. The Branch Mentor should be an active Section member who is engaged with the Student Branch and its institution. Prime candidates are former Student Branch officers.
- Utilize the Section leadership as a IEEE resource (answers, advice, assistance).
- Educate your Student Branch members about the local Section, and the Section - Student Branch connection. Be sure to let Student Branch members know that they are Section members.

Section - Student Branch Connection (Best Practices – Section Meetings)

- Student Branches that participate in the Region 3 Hardware Competition at SoutheastCon can be invited to lead a Section Meeting by presenting their vehicle design and demonstrating the vehicle performance on a practice track. (Region 3 Student Paper Competition is also a possibility).
- A Section can hold a “Student Night” where the Section hosts students from all of its Student Branches. The meeting program can consist of each Student Branch presenting a summary of their activities for the year. Alternatively, the event can be a banquet devoted to networking between the students and professionals.

Section - Student Branch Connection

(Best Practices – Student Branch Meetings)

- The Section can offer to provide speakers or topics for Student Branch meetings. This could take the form of a Section member (or members) presenting on a given topic, a Section member (or members) assisting the branch in planning a local plant tour, etc.
- A Student Branch can invite the Section to campus and host a tour of a research lab/center, tailgate at a football game, host a reception/picnic around some athletic event.

Section - Student Branch Connection (Best Practices – Joint Meetings/Events)

- A meeting can be designated and promoted as a joint meeting between the X Student Branch and the Y Section. The Student Branch and Section spend time planning a meeting around the joint interests of the Section and Student Branch.
- Sections and Student Branches can jointly plan an event as a service to the community (STEM events, judging competitions, mentors for design teams, etc.).

Section - Student Branch Best Practices / Discussion

Pat Donohoe and Fred Orland

The Section - Student Branch Connection (Brainstorming / Discussion)

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SoutheastCon, IEEEExtreme, SPAx

Charles Lord and Rachel Wilson

Welcome to SoutheastCon 2017

“The Internet of Smart Ideas”

at

Embassy Suites Hotel



EMBASSY
SUITES
by HILTON™



Charlotte/Concord, NC

March 30 through April 2, 2017

Sponsored by:

The IEEE Region 3 and the IEEE North Carolina Council

IEEE SoutheastCon Events - Students

- Student Paper Competition
- Hardware Competition
- Software Competition
- Ethics Competition
- Student Branch Website Competition
- Student Branch T-Shirt Competition
- Student Branch Leadership Meeting
- Student Branch Counselors Meeting
- Awards Banquet

IEEEXtreme



On this page:

- › IEEEXtreme Facebook
- › Presentation and pictures
- › Sponsors and partners

IEEEXtreme is a global challenge in which teams of IEEE Student members —advised and proctored by an IEEE member, and often supported by an IEEE Student Branch—compete in a 24-hour time span against each other to solve a set of programming problems.

Registration for IEEEXtreme 10.0 has been extended through 17 October 2016 00:00:00 UTC. The competition will begin on 22 October 2016 00:00:00 UTC — save the date.

Thank you to all the past participants, and a warm welcome to all future programmers.



www.ieee.org/xtreme



Student Professional Awareness Activities

SPAx

- SPAx is the new framework available to help your student branch plan ***professional awareness*** events
 - SPAx events can be conferences (aka traditional SPAC) or any other projects (short or long term) that raise professional awareness.
 - Focus areas: *Career Development, Professional Integrity, Personal Skills, Engineers and Public Policy, Leadership in Professional Organizations, The Practice of Innovation, The Art of Communication, Humanitarian Grand Challenges*
 - Funding: \$200 for a project that has been approved by your region coordinator

SPAx

- SPACs are still being supported under the SPAX umbrella
 - Funding: \$500 will be reimbursed (hotel+airfare) to one of our nationally approved speakers that is invited to your SPAC
- See examples and get started at:
<http://ieeusa.org/volunteers/committees/spax/>
- Point of contact:
Victor Basantes
IEEE-USA SPAC Region 3 Coordinator
victor.basantes@ieee.org

Student Branch Member Recruitment

Membership Recruitment

- Organize volunteers – all officers and committee chairs, enlist branch counselor and other faculty that are IEEE members.
- Develop a membership recruitment plan and set goals.
- Utilize SAMIEEE to analyze your current branch membership.
- Plan and implement a membership drive on campus at least once a year. Strategize and promote the membership drive in advance. Utilize membership development resources from IEEE. Choose a high-traffic location to set up tables with a computer to assist students with the online application. https://www.ieee.org/membership_services/membership/students/index.html
- Consider making a brief membership promotion (< 5 mins.) in targeted classes, with prior approval from professors. In many cases, professors are willing to encourage students to join IEEE..

Membership Recruitment

- Consider targeting special events to recruit specific groups (underclassmen, seniors, graduate students).
- Use the student branch website to promote membership.
- Build a spring membership drive around the half-year dues cycle. Individuals who join IEEE as student members in March get 10 months of membership for the price of 6 months.

IEEE Young Professionals Program (formerly GOLD)



IEEE Young Professionals is an international community of enthusiastic, dynamic, and innovative members and volunteers. IEEE is committed to helping young professionals evaluate their career goals, polish their professional image, and create the building blocks of a lifelong and diverse professional network.

 [Visit the IEEE Young Professionals Facebook Page](#)

Branch Plans

Branch Planning

- Assess the state of your Branch (resources, people, money).
- Identify the major objectives for your Branch for this year (e.g., membership increase, some big event, retain existing members, seek new equipment).
- Identify the specific goals that will help you meet your objectives and identify the events that will make up your Branch Program to achieve these goals.

Example Branch Activities

- Invite speakers on technical or professional subjects.
- Enter design competitions (e.g., Regional Hardware, Software and Ethics Competitions).
- Plan and host a Student Professional Awareness Activity (SPAx)
- Organize field trips to Industry.
- Mentor junior students.
- Organize sales of lab kits, lab manuals, resume books, solved past exams.
- Raise funds for charity or Student Branch projects.
- Develop/enhance a Student Branch website. (IEEE provides free hosting web space at <http://ewh.ieee.org>).

Example Branch Activities

- Use SAMIEEE to access current Branch membership data
<http://www.ieee.org/samieee>
- Participate in engineering awareness programs.
- Visit and organize joint activities with other Student Branches.
- Volunteer at a conference and help staff a membership booth.
- Host an annual “Welcome Back” or “End of School” picnic.
- Work with the local IEEE Section and Region.

Introduction to Collabratec

Charles Lord



IEEE Collaboration Tools

IEEE R3 Student Leadership Training 05 November 2016

Charles J. Lord, PE

Our Topics

- Google Tools
- Intro to Collabratec
- Collabratec Demo
- Q/A

Google Tools

- Integrated with IEEE account <name>.org
- Business level GMAIL account
 - 30Gb
 - Advanced virus and spam filtering
- Google Drive
 - 30Gb
 - Advanced Sharing capabilities
- Google+
- Calendar, Hangouts, Sites (future)



IEEE Collabratec™ Direction & Training

IEEE Member & Geographic Activities

Updated: 12 January 2015

What is IEEE Collabratec™ ?

- IEEE's professional networking / collaboration platform
- Open network, with exclusive member privileges
- Facilitates interactive communities and collaborative research
- **Competitively positions IEEE for the future of professional networking, publishing, and career development...**



Specialized service with a scope and depth of expertise in engineering and technology not found in general social networks

Motivation: Member and Author Satisfaction

- **Need to meet member expectations with a 21st-century, professional networking experience**
 - 25% gap between importance and satisfaction with IEEE opportunities for professional networking
- **Need for IEEE to maintain its position as a world-class publisher**
 - Increasing number of mergers and integrations by publishers with collaborative authoring platforms

2011 IEEE Member Segmentation Study	Importance	Satisfaction
Opportunities for Professional Networking	71%	46%
Gap in Service	25%	

Objectives

Serving the professional needs of IEEE audiences to:

- strengthen connections with the global community of technology professionals
- facilitate professional development and networking
- remotely collaborate in a seamless way
- access and manage the information they need in their profession in an efficient way
- accelerate research and publication with improved tools



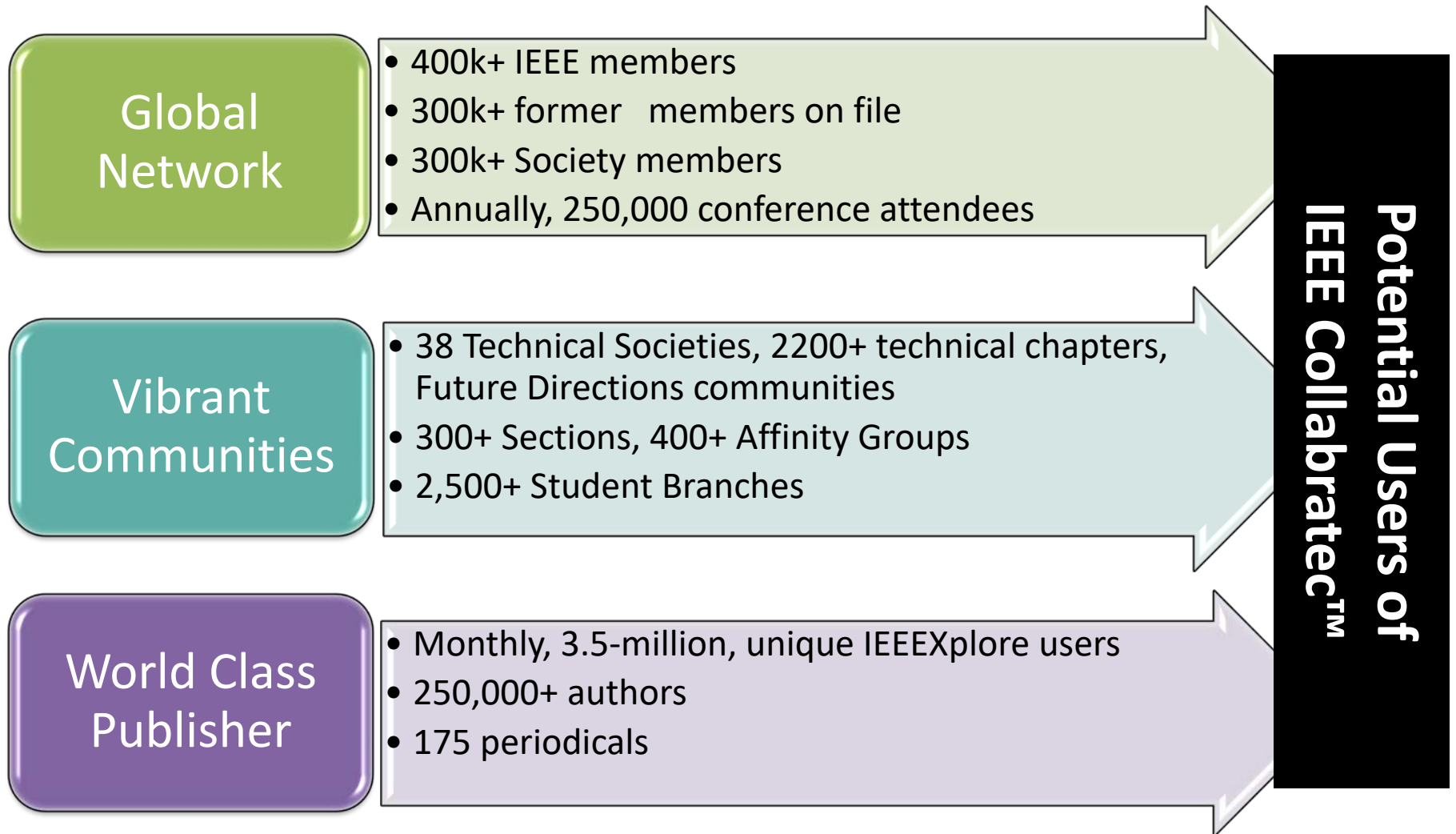
Development Progress

- June 2013 – MGA, PSPB, TAB agree to start work on a single integrated solution
- Summer 2013 – Evaluation conducted of several options for building the service
- Oct. 2013 – Decision to go with in-house built solution based on GoogleApps and Google+
- Nov. 2013 – Board adds to 2014 budget – asks for full business plan by February
- Feb. 2014 – Board receives and approves business plan
- Aug. 2014 – Demonstration at Sections Congress of development progress (to date)
- Dec. 2014 – Launch of Pilot – Review and incorporate pilot user feedback prior to full launch

Late 1Q-2015 – Full Launch

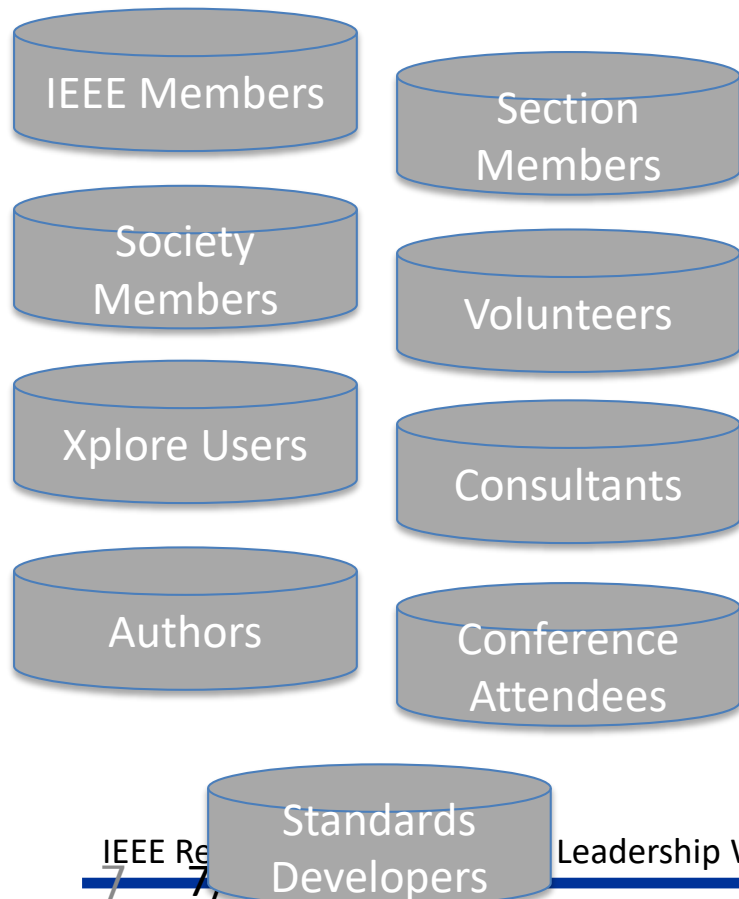


Building on Who We Are

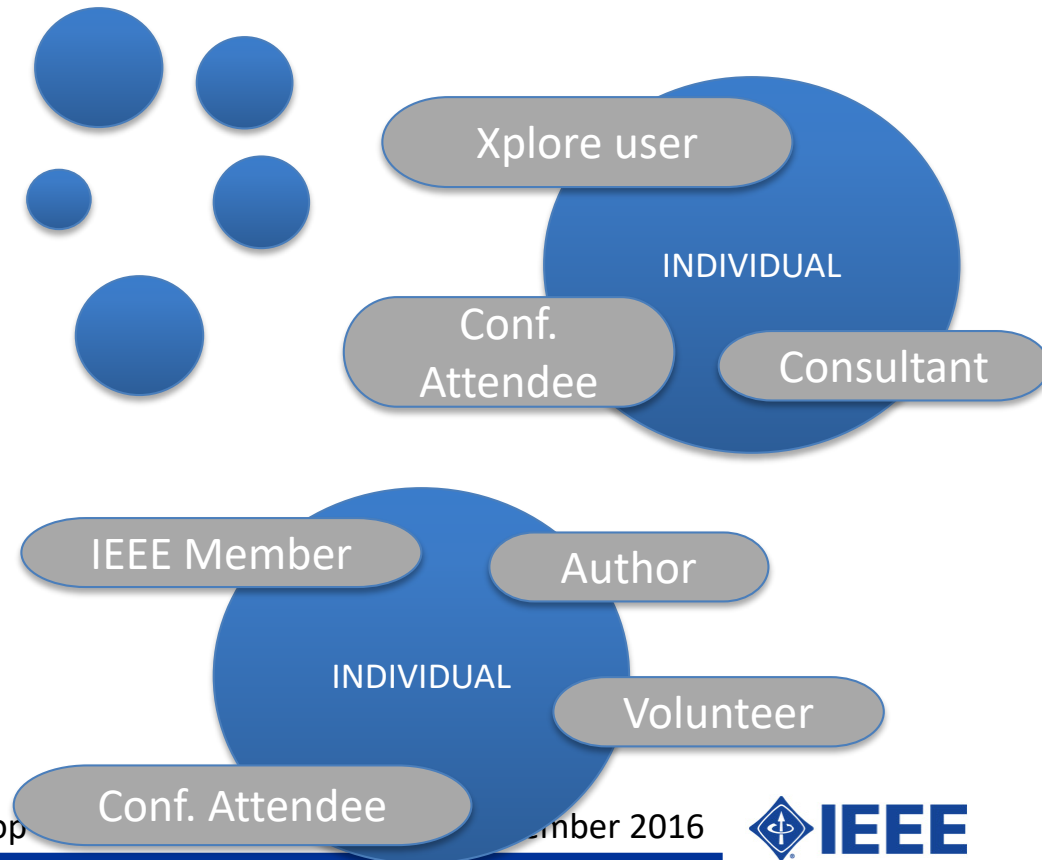


Re-Thinking the Engagement Model

Traditional Organization Unit Perspective



IEEE Collabratec™ Perspective:
One person with one or more affinities



Highlights – Networking Experience

Note

- Screenshots reflect work-in-progress activity, and may be tweaked prior to Pilot launch
- Screenshots of research experience included in Appendix

Google Plus
Extended Community Experience

Other External Network &
Library Integrations
(LinkedIn, Mendeley, Zotero,
ORCID & Facebook)

Google Account - Other Google
Services
(Hangouts, Groups, YouTube, Picasa)

IEEE Collabratec™

Communities
(Q&A, File Posting,
Calendar & Events)

People
(Profile, Interests &
Connections)

User-Defined visibility
options & connected
services

Library & Research Groups
(Meta-Data, Search IEEE Xplore, MS
Academic, Google Scholar)

Activities, Events &
Recommendations

Library Content Storage Google
Account - Drive
(additional storage options – future)

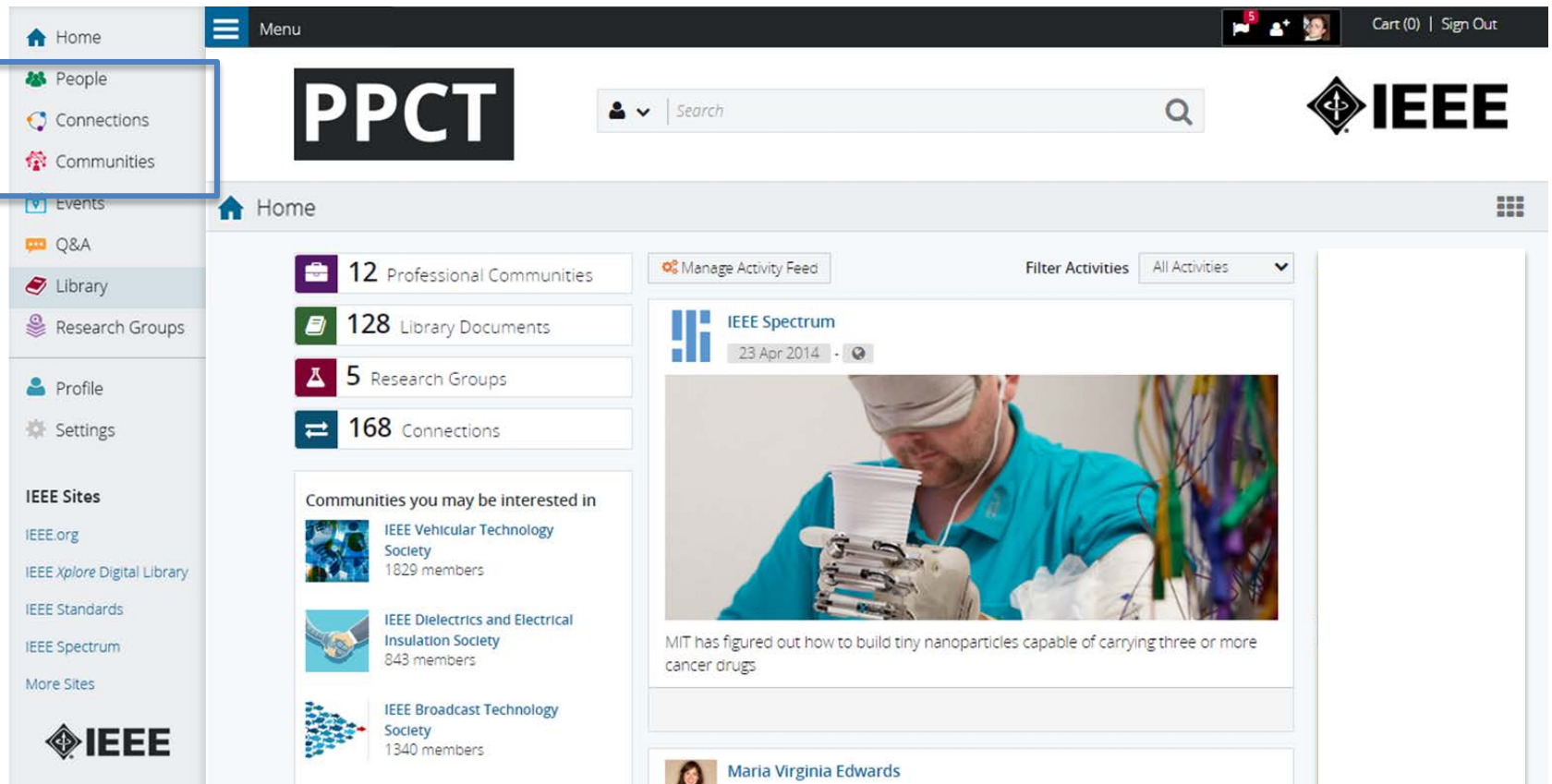
Public Profile Page Option
(If enabled. Only Name is
externally indexed)

Email, Calendar
(IEEE Gapps, Other Gapps Acct
Other email/calendar)

*Optional, 3rd
party service
integrations
enhance an
already
robust IEEE
Collabratec™
user
experience*

Home Page w/ menu extended

▶ Today's Focus: Networking Experience



The screenshot shows the IEEE website home page. A blue arrow points to an extended menu on the left side of the page. The menu items are: Home, People, Connections, Communities, Events, Q&A, Library, Research Groups, Profile, and Settings. Below these are links to IEEE Sites: IEEE.org, IEEE Xplore Digital Library, IEEE Standards, IEEE Spectrum, and More Sites. The main content area features a 'PPCT' logo, a search bar, and the IEEE logo. A 'Home' section displays statistics: 12 Professional Communities, 128 Library Documents, 5 Research Groups, and 168 Connections. It also lists 'Communities you may be interested in' with three options: IEEE Vehicular Technology Society (1829 members), IEEE Dielectrics and Electrical Insulation Society (843 members), and IEEE Broadcast Technology Society (1340 members). A featured article from IEEE Spectrum, dated 23 Apr 2014, is titled 'MIT has figured out how to build tiny nanoparticles capable of carrying three or more cancer drugs'. The article image shows a person in a lab coat working with equipment. The author is Maria Virginia Edwards.

Profile Management

Profile > Details... Standardized layout for multiple constituencies who engage with IEEE, enabling robust professional networking.

The screenshot shows the IEEE Profile Management interface for Nick Lehotzky. The profile is titled "PPCT" and includes a search bar, navigation tabs for "My Profile", "Details", "My Activities", and "My Connections". Nick Lehotzky is an "Active Fellow" from Piscataway, New Jersey, USA, with a category of "Innovation Leader" and a citation: "For contributions to machine per...". The profile completion is at 85%. Interests include System Architecture, CRM, Program Management, Software Design, Web Analytics, Web Design, Enterprise Architecture, Cloud Computing, Fraud, Project Management Analytics, Digital Asset Management, Marketing, Interaction Design, and Agile Methodologies. IEEE Memberships include IEEE Power & Energy Society (PES) and IEEE Vehicular Technology Society (VTS). Contact information includes a mailing address at 445 Hoes Lane, Piscataway, NJ, 07054, and an email address. A notification pop-up is visible, showing a connection request from James Myers and updates from Clarence Parker, Kathleen Price, Sandra Cooper, and Bruce Gomez.

Key Features

Consolidated view into individual interests, biography, and connectivity

User updates per engagement with others and activities

Linkage to profiles on other professional and social networking platforms

Profile Management (cont'd)

Profile > My Connections... Personalized list of professional contacts, members and non-members, within the PPCT experience.

Profile ▾ Details Activities **Connections**

Your Connections — 156 Pending Requests — 5

Showing 1-16 of 156 < > 🔍 Start typing here...

Robin Wallace IEEE Standards Los Angeles	✉ ⚙	Maria Virginia Edwards Google Chicago	✉ ⚙
Karen Robertson Microsoft Sydney	✉ ⚙	Joyce C. Cooper Apple Computer Tokyo	✉ ⚙
Phillip Murphy IBM New York	✉ ⚙	Stephanie Warren LG Electronics Vancouver	✉ ⚙
John Day General Motors Dallas	✉ ⚙	Elizabeth Holmes Hewlett-Packard Buenos Aires	✉ ⚙
Robin Wallace IEEE Standards Los Angeles	✉ ⚙	Maria Virginia Edwards Google Chicago	✉ ⚙
Karen Robertson Microsoft	✉ ⚙	Joyce C. Cooper Apple Computer	✉ ⚙

Key Features

Recommendations based on profile attributes and engagement in IEEE

Management of existing and pending connection requests

Messaging capabilities with IEEE Collabratec™ contacts

5 November 2016



Settings

Settings > Personal Information... Convenient console for users to manage their engagement with IEEE Collabratec™

The screenshot shows the 'Settings' page with the 'Personal Information' tab selected. The page is divided into several sections:

- IEEE Personal Data:** Name, profile photo, gender, date of birth, biography, contact info. (Manage button)
- Professional and Educational Info:** Current and previous employers, certifications, university/college etc. (Manage button)
- Memberships and Subscriptions:** Manage your IEEE Memberships. (Manage button)
- Technical Interests:** A section with a search bar and a list of interest tags. A dropdown menu is open, showing sorting options: 'Date added' (selected), 'Alphabet', and 'Popularity'.
- Your Publications:** A section with input fields for 'Last Name', 'First Name', and 'Middle Name', and a 'Claim Your Papers' button.

Key Features

Technical interests management to tailor feeds and recommendations

Privacy controls to manage visibility within platform and beyond

Attached services to manage connectivity with other tools and resources

Settings (cont'd)

Settings > Privacy... Flexibility in managing the scope and breadth profile visibility and engagement with others.

Settings

Personal Information **Privacy** Library Attached Services E-mail Notifications

Master Visibility Setting
Define who will be able to see your PPCT profile. This one may override other visibility settings. Custom Selection

Profile Visibility

Field	Visibility Setting
Who can see your profile photo	All Users
Who can see your biography	All PPCT Users
Who can see your grade, volunteer status, category and citation	IEEE Members
Who can see your current location	My Connections
Who can see your IEEE section	Only Me
Who can see your interests	IEEE Members
Who can see your working experience	My Connections
Who can see your education	Only Me
Who can see your mailing address	My Connections
Who can see your e-mail address	All Users
Who can see your instant messenger	IEEE Members
Who can see your phone number	My Connections
Who can see the list of your communities	Only Me
Who can see your memberships	My Connections
Who can see your publications	All Users
Who can see your awards	IEEE Members
Who can see your connected social profiles	My Connections

See how exactly your profile is shown to other users.

View My Profile As

- Unregistered User
- PPCT User**
- IEEE Member
- My Connection

Key Features

Five settings ranging from private to publicly indexed by search engines

Customized settings enabling variable visibility by field

Permissions control over messaging and engagement options

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Settings (cont'd)

Settings > Attached Services... Enhanced experience through the ability to integrate utilities, resources, and/or social networks.

Settings > Attached Services

Google+ Manage

Facebook Manage

Google Drive Manage

Services to Connect

LinkedIn Connect
Connect your LinkedIn account to invite your network to PPCT.

Twitter Connect
Connect your Twitter account to invite your network to PPCT.

OrCID Connect
Connect your ORCID account to invite your network to PPCT, and use files stored in OrCID.

These storages connectivity is coming soon
Subscribe to be notified as soon as each one is released. Select service of your interest.

Dropbox
Connect your Dropbox account to be able to use your files on PPCT.

Microsoft Skydrive
Connect your Skydrive account to invite your network to PPCT, and use files stored in Skydrive.

Key Features

One-stop management of services connectivity with other networks

Supports aggregation of feeds from other networks into IEEE Collabratec™

Cloud storage connectivity regardless of location or device

Networks & Collaboration

Networks > People... Access to the people engaged in the world's largest, technical professional society.

The screenshot displays the IEEE Network interface. At the top, there are tabs for 'Communities', 'People', and 'Activities', with 'People' selected. A search bar shows 'Engineering' with filters for 'PPCT Cirles', 'India', and 'United States'. The results list three profiles: Jane Craig (Manager, Fox Business Corporation), Konstantinos Karachalios (Managing Director, IEEE-Standards), and Frank Robertson (University of Utah, University of Virginia). Each profile includes a photo, name, title, location, and options to 'Connect', 'Message', and 'Add to Research Group'. A 'Shared connections' section lists Michael Campbell, Stephen Richardson, Catherine Reyes, Brenda Murphy, Nicholas Young, and Shirley Simpson. A 'Shared interests' section lists Cloud Computing, IEEE Transactions on Services, IEEE International Conference on Cloud Computing, Social Networking, and Analysis. On the left, there are filters for 'Relationship' (PPCT Connections, PPCT Extended Connections, Similar to You, Community Members, Everyone Else), 'Country' (India, United States, Japan, United Kingdom, Germany, Canada, South Korea), 'Interests', 'IEEE Region', 'IEEE Section', and 'Company'.

Key Features

Grade badging to distinguish IEEE members among each other and other users

Search faceting to locate users by specific criteria and level of engagement

Connectivity through shared interests, invitation management, and messaging

5 November 2016



Networks & Collaboration (cont'd)

Networks > Activities... Updates from people, resources, and events of interest to you and your connections.

The screenshot shows the IEEE Network Activities feed. At the top, there are navigation tabs for 'Network', 'Communities', 'People', and 'Activities', with 'Activities' selected. Below the tabs, there are controls for 'Manage Network Activity Feed', 'Filter Activities', and 'Connection Update'. The main content area is divided into two columns. The left column, titled 'People that share your interests from your extended circles', lists three individuals: Robin Wallace (IEEE Standards, Los Angeles), Karen Robertson (Microsoft, Sydney), and Phillip Murphy (IBM, New York). A 'View all' button is located below this list. The right column displays a feed of activities. The first activity is from Kimberly Allen (dated 20 Apr 2014) with the text: 'Well other than the usual professional job I like to say in this occasion that an importance should give on tooo.... "Awareness building up programme": There are 1000 billions barrels of fossil fuel reserve with a usage of 100 millions [More](#)'. The second activity is from ICCI Community (dated 20 Apr 2014) announcing a '2014 International Conference on Computer Communication and Informatics (ICCCI)' scheduled for 3-5 Jan 2015. The third activity is from IEEE TV Spotlight (dated 20 Apr 2014) featuring a video titled 'Carl Selinger: Stuff you Don't Learn in Engineering School' with a duration of 00:07:35. The video player shows a play button over a still image of Carl Selinger. At the bottom, the IEEE Spectrum logo is visible.

Key Features

Targeted opportunities to users by their defined interests and engagement

Aggregation of updates from contacts and connected services

Filtering settings to expand or contract scope and breadth of activity feed

5 November 2016



Networks & Collaboration (cont'd)

Networks > Communities... Harnessing self-defined and shared interests to foster peer-to-peer dialog and collaboration.

The screenshot displays the IEEE Communities interface. At the top, there are navigation tabs for 'Network', 'Communities', 'People', and 'Activities'. Below this, a section titled 'Your IEEE communities — 15' features a grid of community cards. Each card includes a representative image, the community name, and its member count. The communities shown are: IEEE Transactions on Computing (5321 members), IEEE Power & Energy Society (654 members), IEEE Dielectrics and Electrical Insulation Society (1372 members), IEEE Robotics and Automation Society (12452 members), IEEE Product Safety Engineering Society (841 members), IEEE Computational Intelligence Society (453 members), IEEE Robotics and Automation Society (12452 members), IEEE Industry Applications Society (12452 members), and IEEE Cloud Computing (12452 members). A 'Manage' button is located in the top right of this section, and a 'Show All' button is at the bottom. Below this is a section for 'Recommended IEEE private communities — 2'. The first is the IEEE Photonix Society (13511 members), described as a place to develop professional identity in STEM fields. The second is the IEEE Industry Applications Society (21435 members), focused on industry and commerce needs. A 'Learn More' button is present for each recommended community. A tooltip message states: 'You do not have access to this community. You must first join IEEE Photonix Society. Click Learn More for additional info.'

Key Features

Discover technical, professional or geographic communities

Access to communities based on IEEE or Society membership

Consistent user experience and feature-set across communities

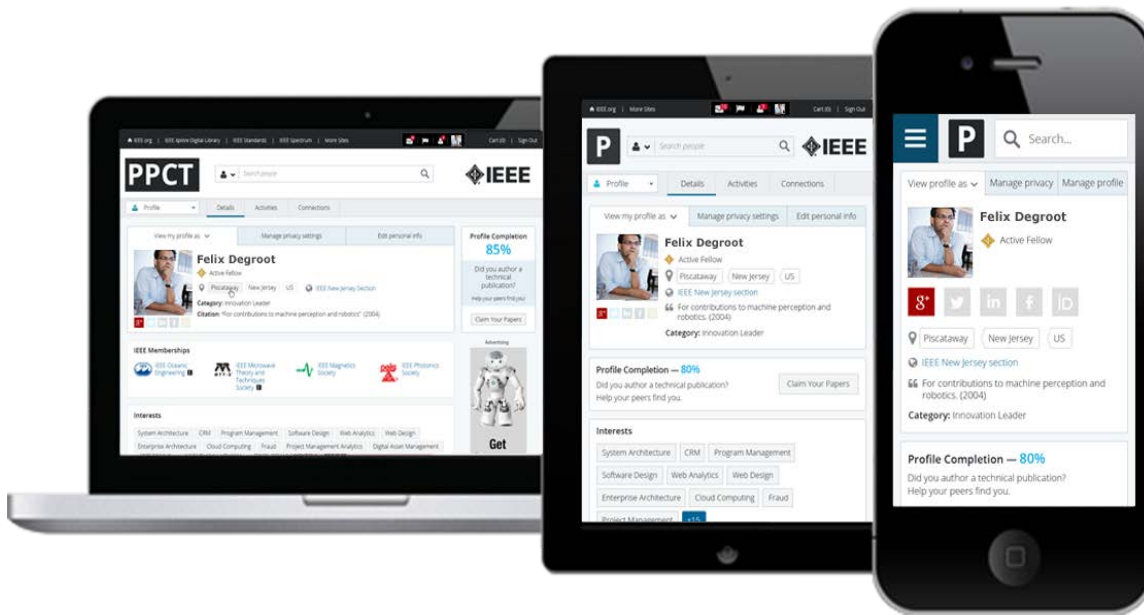
5 November 2016



Mobile-Accessible at Launch

Device Compatible... Ubiquitous access through mobile and tablet formats to meet user preferences.

Key Features



Responsive design to adapt to viewer device

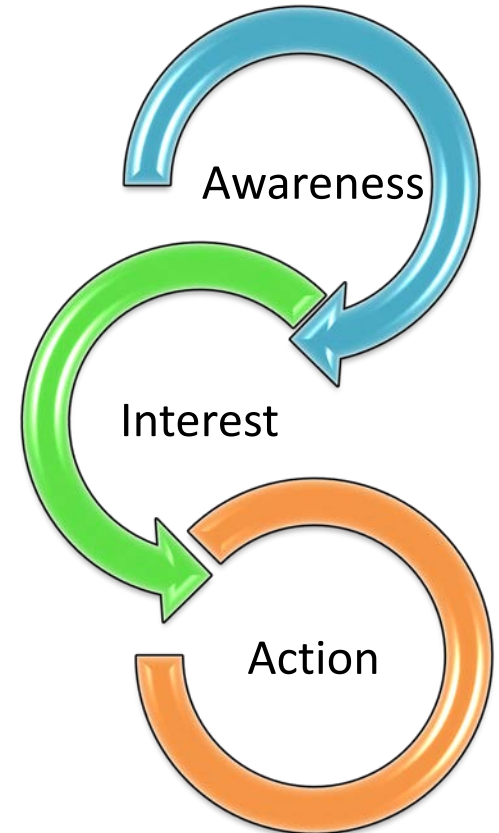
Optimized navigation offering dashboard and drill-down usage

App-version to be assessed for future releases

Communities

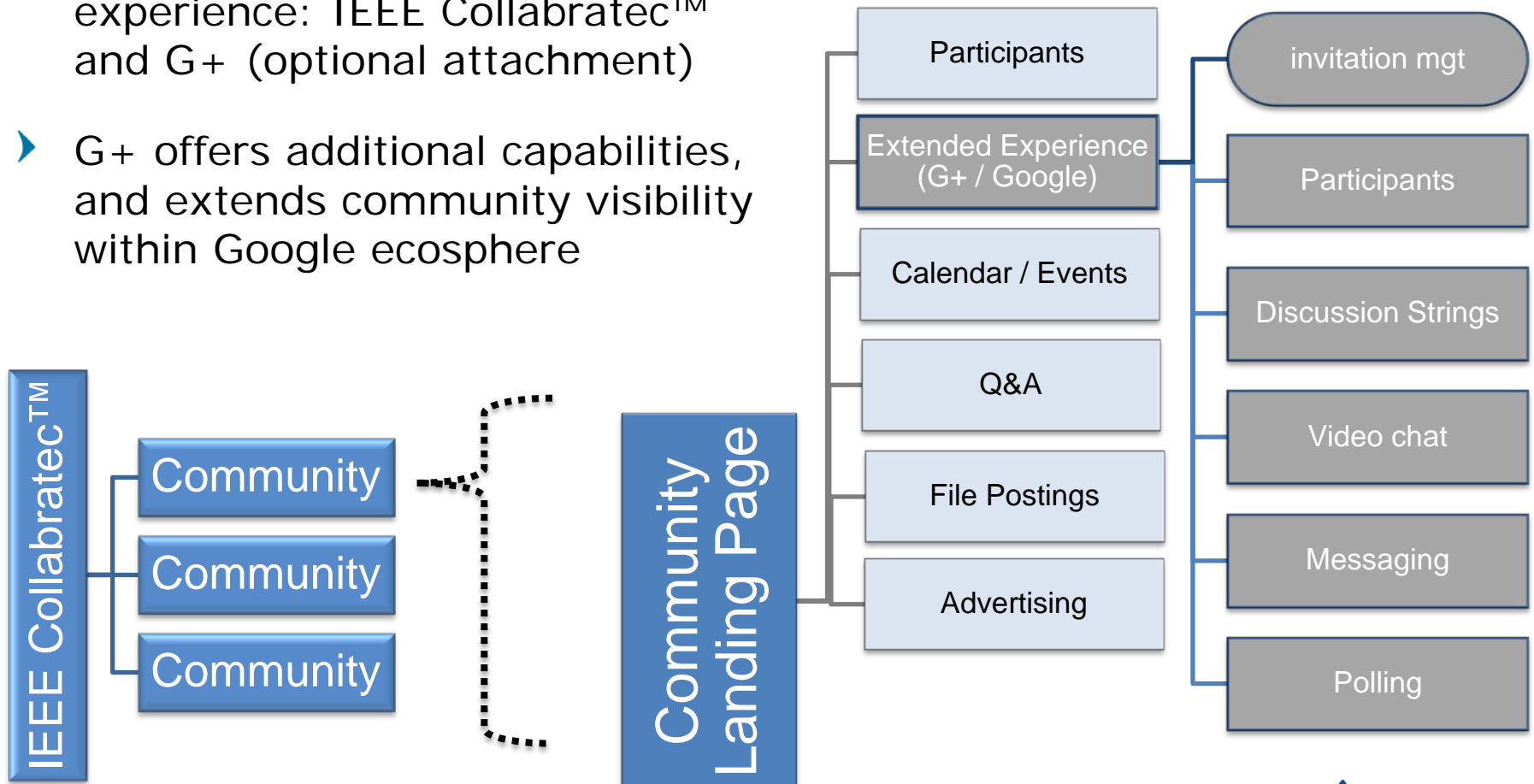
Communities Strategy

- Embracing a 21st-century model for business-to-consumer and peer-to-peer engagement
- Offering venues for members and non-members to virtually congregate and interact based on shared interests (technical, geographic, vocational)
- Enabling IEEE to nimbly serve individuals working burgeoning technologies—and reaching individuals regardless of physical location or proximity



Sponsored Communities (functional view)

- ▶ Two spheres of the community experience: IEEE Collabratec™ and G+ (optional attachment)
- ▶ G+ offers additional capabilities, and extends community visibility within Google ecosphere



Sponsored Communities (user interface)

IEEE Collabratec™ Experience

- Landing page
- Community provider (sponsor)
- Participants
- Calendar
- Activities
- Files
- Q&A
- Advertising
- *Extended experience*

The screenshot shows the IEEE Collabratec user interface for a 'Cloud Computing' community. The interface includes a search bar, navigation tabs (Network, Communities, Question & Answer, People, Events, Activities), and a main content area with a document upload, a video share, and a list of questions. A red box highlights a 'Extend your experience by attaching Google+ plus' button.

Extended experience

- Participants
- Discussion strings
- Polling
- Messaging
- Video Chat

(optional, attached G+ / Google account)

Community | Events

(within IEEE Collabratec™ proper)

The screenshot shows the IEEE Collabratec interface for the 'Cloud Computing' community. At the top, there are navigation tabs: Network, Communities, Question & Answer, People, Events, and Activities. The 'Cloud Computing' community header includes a 'Show Details' dropdown and a 'Leave Community' button. Below the header, there are tabs for 'Activities', 'Files', 'Q & A', 'Events', and 'Participants'. The 'Events' tab is active, displaying a list of 145 events in the community. The list includes:

- 31 Aug 2014**: 2014 IEEE Transportation Electrification Conference and Expo, Asia-Pacific (ITEC Asia-Pacific). Conference. Beijing, China. [www.itec.org](#)
- 03 Sep 2014**: 2014 11th International Conference on Control, Automation and Robotics. Meeting. Vienna, Austria. [www.iccar.org](#)
- 31 Aug 2014**: 2014 IEEE 18th International Conference on Object Computing Demonstrations (EDOCWD). Webinar. [www.edocwd.org](#)
- 28 Sep 2014**: INTELEC 2014 - 2014 IEEE International Telecommunications Energy Conference. Conference. TBD, Vancouver, BC, Canada. [www.intelec.org](#)

On the left side, there is a 'Participants' section with 1379 members and a calendar for September 2014. A 'View All' button is also present. On the right side, there is a section titled 'Extend your experience by participating on G+' with a list of benefits and an 'Attach Google+' button.

Recommended Events based on your interests

- 09/14 - 09/17, 2014
Vienna, Austria
2014 IEEE International Conference on Internet of Things (IThings)
- 09/17, 2014
Vancouver, BC, Canada
INTELEC 2014-2014 IEEE International Telecommunications Energy Conference
- 09/14, 2014
Beijing, China
2014 22nd European Signal Processing Conference (EUSIPCO)

[View all 14 events](#)

Community | Q & A

(within IEEE Collabratec™ proper)

The screenshot shows the IEEE Collabratec community interface for the 'Cloud Computing' community. At the top, there are navigation tabs: Network, Communities, Question & Answer, People, Events, and Activities. The 'Cloud Computing' header includes a cloud icon, the community name, and options for 'Show Details' and 'Leave Community'. Below the header are tabs for 'Activities', 'Files', 'Q & A', 'Events', and 'Participants'. A sidebar on the left shows 'Community provided by IEEE Germany section' and 'Participants 1379' with a grid of profile pictures and a 'View All' button. Below the sidebar is a calendar for September 2014. The main content area displays '6 Questions in Community' with a search bar and a 'Send' button. Two questions are visible: 'Who's gonna win the World Cup this year?' by James Kirk (0 answers, 1 week ago) and 'How do I create smart objects in Adobe Photoshop CS6?' by Sarah Grant (0 answers, yesterday).

The screenshot shows a question and answer thread. The question is titled 'SIW (Substrate-integrated-waveguide) antenna why?' by Dean Hollis, dated Jul 27, 2014 - 01:24 PM. The question text reads: 'I just read an article about a new type of transmission line called SIW or Substrate-integrated-waveguide, I understand that this is better than a rectangular waveguide mainly because there are no limitations of dimension of the thickness of the SIW (on a rectangular waveguide 2:1). but why is it better than microstrip and strip line? also why there is no TM mode in SIW?'. Below the question is a section for 'Your answer' with a text input field and a 'Send' button. The 'Source: (optional)' field is empty. Below the answer field is a section for 'Answers - 3'. The first answer is by Brian Pratz, dated Jul 28, 2014 - 08:24 AM, with the text: 'Microstrip or stripline loses TEM propagation as the substrate thickness approaches 1/4 electrical wavelength, so PCB substrates become very thin for mm-wave, thus the lines are very lossy. I'm sure the SIW is lower loss too. I'd think the SIW would support TM, unless it has something to do with the wall posts.' The second answer is by Andy Kaumi, dated Jul 28, 2014 - 01:24 AM, with the text: 'It would help if I had a little more information like a picture of the patch or a link to an article. Even without that I can make a couple of comments. 1. If the patch is close to square (or round), little stubs or slots can be used to break the degeneracy of the two almost identical modes. 2. If the patch is used over a wide enough bandwidth, than higher order (unwanted) modes can exist. Slots can be used to disrupt the currents and thus suppress the unwanted modes. This may or may not answer your question but it is a start.' The third answer is by Claire Oakfield, dated Jul 28, 2014 - 08:24 AM, with the text: 'APS magazine had a couple of good U-slot patch articles a few years back: ieeexplore.ieee.org/stamp/stamp.jsp?tp=&arnumber=5466402 ieeexplore.ieee.org/stamp/stamp.jsp?tp=&arnumber=6028422 The first one is a good reference for the U-slot patch design. The second one is a good reference for the U-slot patch design.' The thread includes 'Report it' links for each answer.

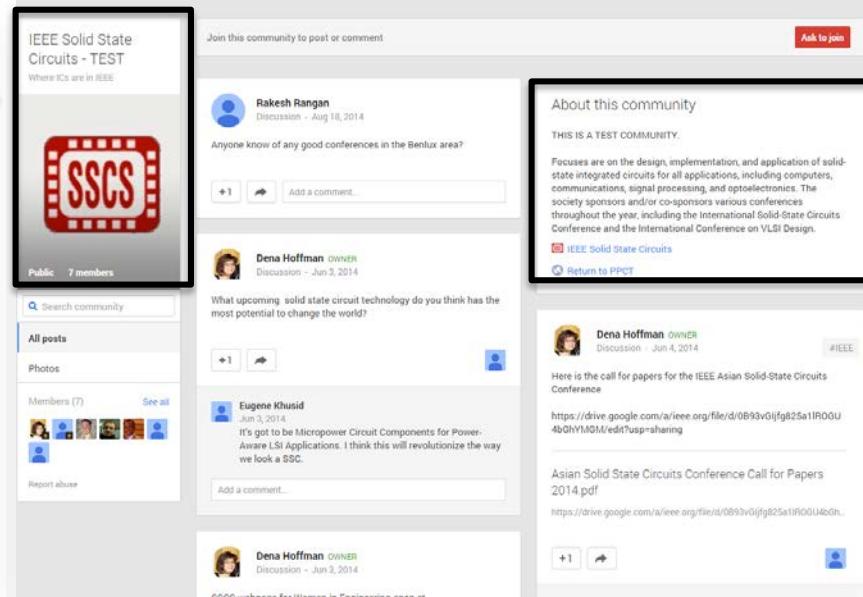
Extended Community Experience

(within G+ / Google, optionally attached)

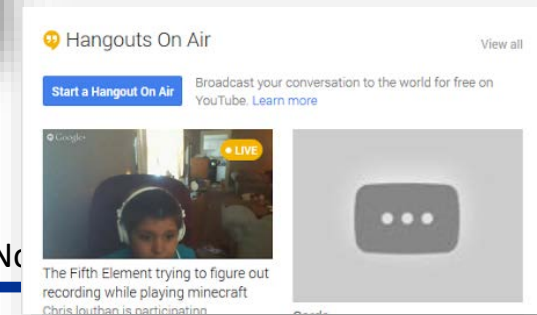
Features

- Participants; Discussion strings; Polling; Messaging; Video Chat

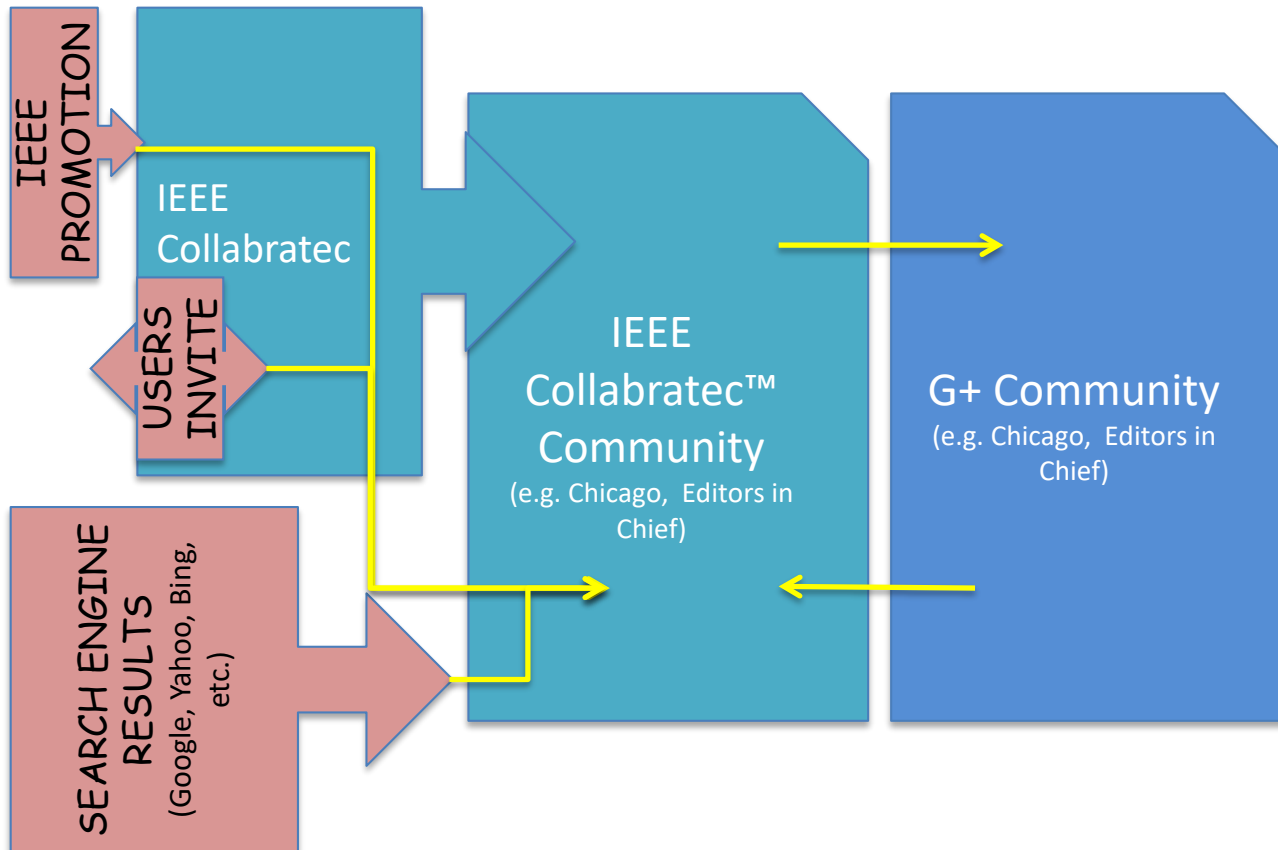
Community name and graphic (same as IEEE Collabratec™)



Community overview and links to respective community on IEEE Collabratec™, and community sponsor(s)

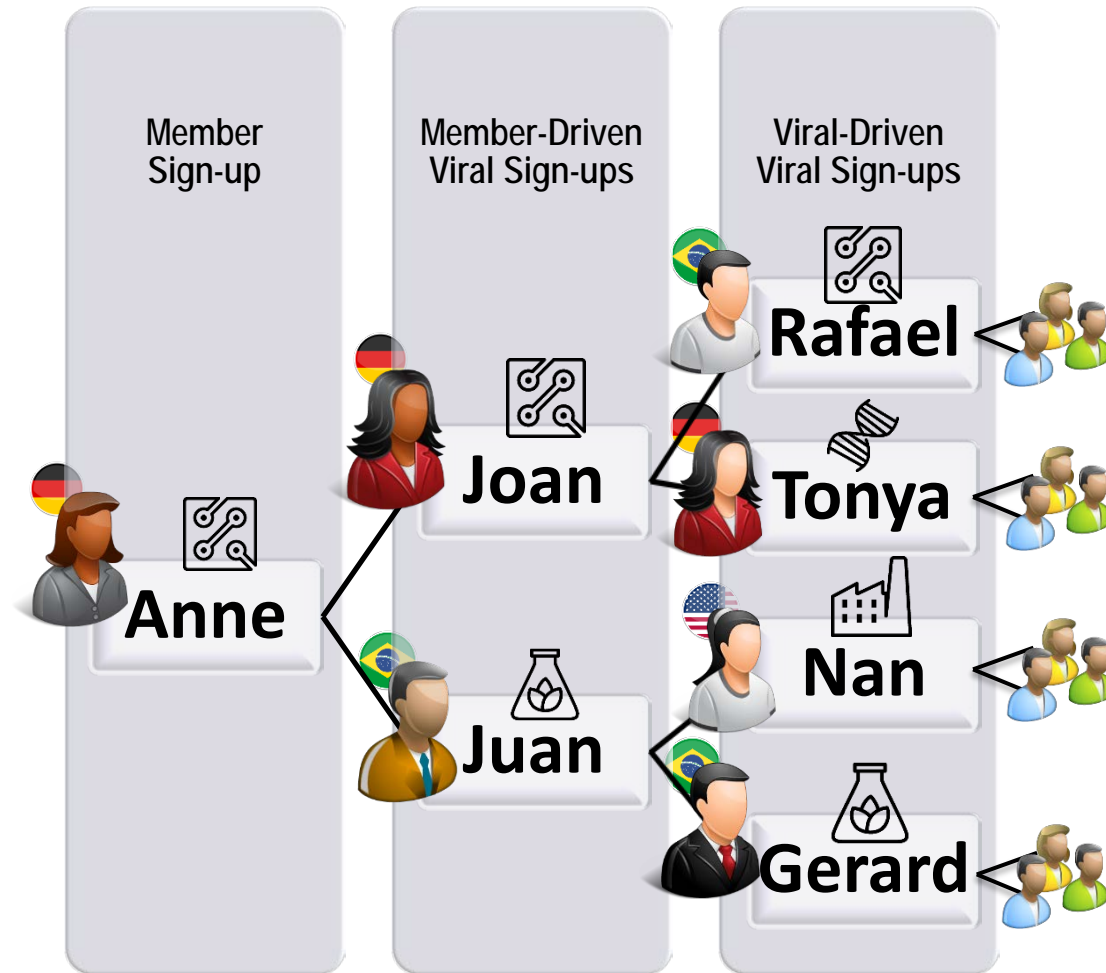


Community Discovery & Access



Users Can Drive Growth

- Users can invite colleagues into IEEE Collabratec™
- Minimum requirement an IEEE web account (members or non-members)
- Anticipate peer-to-peer referrals will likely:
 - ❖ Occur first in the workplace
 - ❖ Accelerate adoption internationally
 - ❖ Extend IEEE visibility into the non-IEEE audiences



• To be propelled by large-scale, IEEE marketing push

User & Volunteer Support for IEEE

- Users / Members **Collabratec™**
 - Contact Center website
 - FAQs
 - Video tutorials
 - Getting started PDFs
 - Webinars
 - Contact Center staff
 - Phone, Email, Online chat
- Volunteer Moderators
 - Community specialists / Staff liaisons
 - Moderator training webinars
 - Moderator FAQs files
 - Best practices tool kit
 - Staff contact

Thank You! Questions?

Appendix

Collaborative Research & Authoring Tools

Research & Document Mgt

Research > Library... provides tools for authors and researchers to manage their personal research collections.

The screenshot displays the IEEE Research & Document Management Library interface. At the top, there are navigation tabs for 'Library', 'Files', 'Authors', and 'Conferences'. A search bar is present with the text 'IEEE Library' and a search button. Below the search bar, it indicates 'You have 82 items in your library' and 'Showing 1-10 of 82'. The main content area shows a list of items with columns for 'With selected...', 'Author', 'Document Title', 'Publication Title', and 'Year'. The list includes items by R. Rovatti, S. Callegari, F. Pareschi, and S. Poli. On the left, there are filter sections for 'Filters', 'Type', and 'Publication Year'. The 'Filters' section includes options like 'All', 'Recently Added', 'Requires Attention', 'To Review', 'Favorites', and 'My Publications'. The 'Type' section includes options like 'Conference Article (32)', 'Journal Article (24)', 'Other (18)', 'Book Chapter (7)', and 'Standard (1)'. The 'Publication Year' section includes options like '2010 (9)'. The interface also features an 'Import' button in the top right corner.

Key Features

Organize research and flag items as favorites for further review

Filtered contents of library by type, publication year, keywords, or collections

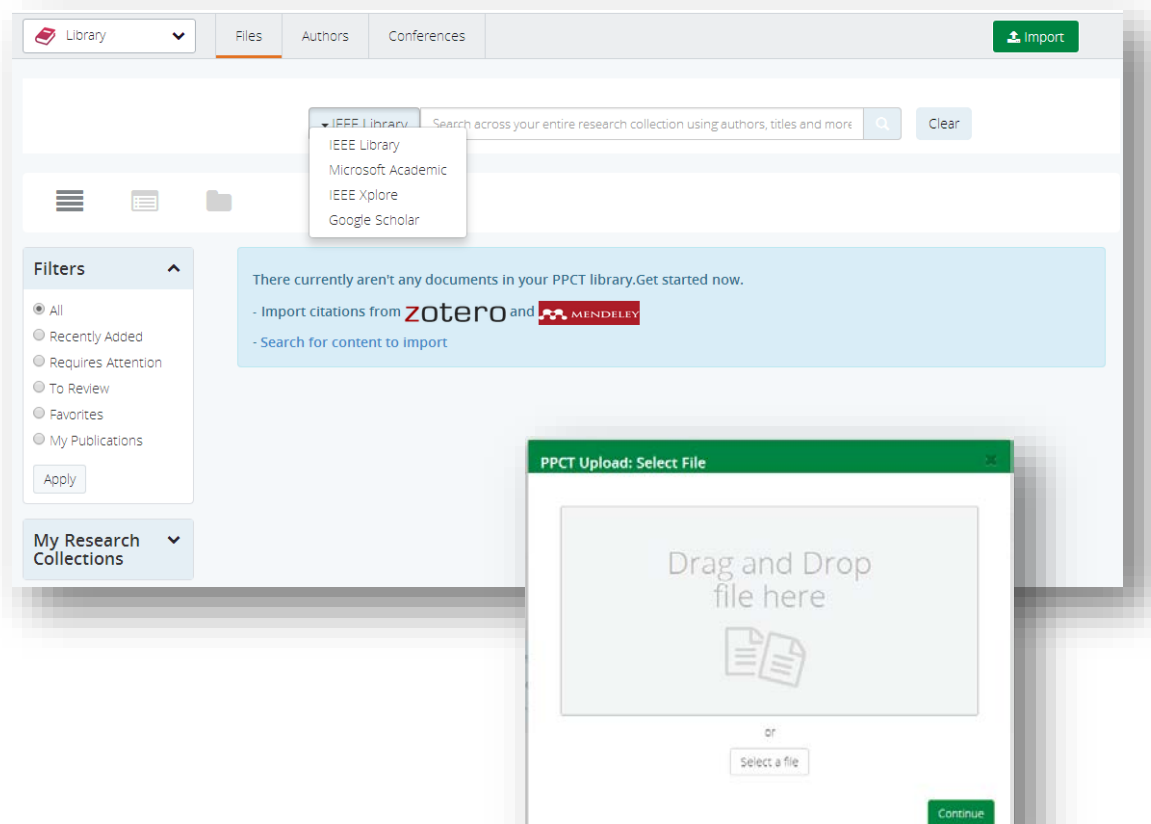
Search type-ahead for suggestions to easily locate research

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Research & Document Mgt (cont'd)

Research > Importing... Import and upload content using a variety of methods; Ability to search and claim documents authored.



Key Features

Import local files in a variety of formats including PDF and Word

Synchronize existing research collections from Mendeley or Zotero

Search IEEE Xplore, Google Scholar or Microsoft Academic

Research & Document Mgt (cont'd)

Research > Research Groups... Engage in collaborative authoring with peers in private groups on topics of mutual interest.

The screenshot displays a web interface for a 'Research Groups' page. At the top, there are navigation tabs for 'Research', 'Library', 'Research Groups', and 'Activities'. The main content area is titled 'Cloud Computing' and shows '11 Participants'. Below this, there are tabs for 'Activities', 'Documents', and 'Participants'. A post by 'Yang Hu' is visible, titled 'Exploring and Exploiting the Multilevel Parallelism Inside SSD Performance and Endurance'. To the right, there are options to 'Invite Others to the Group' (From Connections, Search PPCT, Via Email) and a 'Hangouts' section. A context menu is open over the post, showing 'Save', 'Share', and 'Download' options.

Key Features

Activities that chronicle group discussions related to the research

Documents related to the group's research collaboration

Participants actively involved in the research group

Event Wrap-Up

Fred Orland