

R3 2025 Goals

Engaging New Leadership

From R3 Planning Meeting, 7 Dec 2024, Charlotte

Last updated: 2025-01-26

IEEE Region 3 Strategic Plan 2025

URL: <https://r3.ieee.org/about>

Our Mission

Focus on the growth and development of the member throughout the life cycle of the individual. Every member is an active participant, an informed and a satisfied member.

Our Vision

The Region shall fulfill the Member and Geographic Activities (MGA) strategic objectives at the local level by ensuring the enabling of the Sections, Chapters, Affinity groups, Student Branches, and Student Branch Chapters to engage the member.

Theme

Engaging New Leadership



1. Improve Section Vitality across the region by focusing on sections that need vitality support.



2. Provide all Sections the training and support they need.



3. Ensure Sections use the vTools election process.



4. Consolidate reporting (Concur approvals, Conflict of Interest forms, etc.) with assistance from IEEE staff.



5. Assist Sections in developing and maintaining a Section Succession Plan.



6. Develop metrics for Section engagement with Student Branches.



7. Develop and prototype industry engagement activities



8. Provide an engaging and surplus-generating SoutheastCon 2025 and other Region/Section sponsored conferences and plan for similar success in 2026-29.



9. Engage members through new events and (micro-)volunteering opportunities.

Goal 1 - Improve Section Vitality across the region by focusing on sections that need vitality support.

Lead

Director-Elect Sonya Dillard and Area Chairs

Detail

- Director-Elect to help create, implement and manage the meeting stats for all Sections. Monitor progress of the Section Vitality Meeting (SVM) to be hosted in-person, hybrid or virtual. These meetings will help to re-invigorate the Sections and improve overall health and vitality.

Next quarter tasks to achieve goals

- Area Chairs will assist in organizing, creating focused topics, and hosting the SVM for each of the Sections identified as needing vitality support.
- Invite Section officers, members, and all affinity groups.
- Discuss with Section Leadership at SoutheastCon.

Project Success - Metrics

- Total # of SVMs held in 2025 for all Areas Chairs.
- Compared Total # meetings held in 2024 vs 2025, for Sections identified in Area Chairs "Top 3 List".
- # of Section meetings held and reported each month. Include metrics on monthly Area Report.
- # of chapter/Affinity Group (if applicable) meetings held and reported each month.

Progress

Milestone	Target Completion	% Complete
Task 1 – ACs will ask all Sections for an annual meeting plan.	4Q2024	0%
Task 2 – Area Chairs to identify their "Top 3 List" of Sections that need region vitality support.	4Q2024	90%
Task 3 – Area Chairs to schedule a SVM with Officers, Members and Affinity Groups.	1Q2025	0%
Task 4 – Host SVM for all identified sections and submit L-31s. AC to Follow-up as needed.	4Q2025	0%

Risks and Recommendations

- Risk of low response, due to minimal volunteers within the Sections.
- Utilize OU Analytics to inform members about meeting plans and SVM agenda.



Goal 2: Provide all sections the training and support they need.

Lead
SSC Chair Kristin Bing

Detail
Leverage 2023 SSC survey to determine 4 virtual training events to hold

- Next quarter tasks to achieve goals**
- Schedule webinars for year from list started in 2024
 - Hold one webinar

- Project Success - Metrics**
- Complete milestones
 - Get at least the number of people who indicated a need for the type of training in the survey to attend each event
 - Post recordings online!

Progress

Milestone	Target Completion	% Complete
Hold one webinar and post online	1Q	
Hold one webinar and post online	2Q	
Hold one webinar and post online	3Q	
Hold one webinar and post online	4Q	

Risks and Recommendations

- Communication of the event details must get to everyone who may be interested. Due to how people configure their IEEE preferences, time should be allotted for the communications committee to promote each event on multiple platforms



Goal 3 – Ensure Sections use the vTools election process.

Lead

Director-Elect Sonya Dillard and Area Chairs

Detail

- This Goals was initiated in 2024 will be complete in 2025. The Director-Elect will monitor and assist the Area Chairs in getting 100% of all Sections to utilize the vTools election process via training, resources, and helping with nominations process.

Next quarter tasks to achieve goals

- Use OU Analytics to gather report data.
- Continuous communications with Section Leadership via email, and call if they have not responded.
- Area Chairs will offer to be a member of the Section’s nominations committee if there are not enough officers to support the process.

Project Success - Metrics

- Total # of Sections that completed the elections process using vTools in 2025. Compare to 2024.

Progress

Milestone	Target Completion	% Complete
Task 1 – ACs will Socialize the mandatory use of vTools for Nominations / Voting.	3Q2024	100%
Task 2 – ACs will list which Sections have initiated vTools elections and which are on the opposite year cycle.	4Q2024	50%
Task 3 – ACs will follow up with non-compliant Sections offering their assistance until vTools election is successful.	4Q2025	40%

Risks and Recommendations

- Potential frustration of Section leadership from excessive emails.
- Offer multiple virtual training sessions provided by IEEE HQ.



Goal 4 – Consolidate reporting (Concur approvals, Conflict of Interest forms, etc.) with assistance from IEEE staff.

Lead

Director Eric Grigorian, Treasurer Joe Pennisi

Detail

Continue to improve compliance by Region and Section leadership in meeting IEEE compliance requirements, including compliance with travel policies. Engage with section treasurers for timely submission of financial reports, transition to IEEE Concentration Banking accounts and submission of 2025 section budgets.

Next quarter tasks to achieve goals

- Timely submission of financials to maximize rebates
- Completion of COI forms
- Submission of budgets to R3 Treasurer

Project Success - Metrics

- ## of submitted financial reports
- # of completed COI forms
- # of budgets received
- # of converted external accounts

Progress

Milestone	Target Completion	% Complete
Complete and submit financial records	2/15/2025	
Complete and submit COI forms	2/15/2025	
Submission of Section budgets to treasurer	3/21/2025	
Transfer Section funds from external accounts to Concentration Banking Accounts	9/30/2025	

Risks

Late submission of financial reports and completion of COI forms

Recommendations

Work with Area Chairs for communication with Section officers



Goal 5 – Assist Sections in developing and maintaining a Section Succession Plan.

Lead

Director-Elect Sonya Dillard and Area Chairs

Detail

- Director-Elect will monitor and assist the Area Chairs with socializing and encouraging all Sections to create a Section Succession Plan (SSP) and provide leaders with guidance as a starting point.
- Guidance is given at the following IEEE CLE Link: <https://ieee-elearning.org/mod/page/view.php?id=1601>

Next quarter tasks to achieve goals

- Director-Elect will poll Regions for a good example of a Section Succession Plan to disseminate as a template for Sections to use.
- Discuss at SoutheastCon via SSP Informational Session for Section Leadership.
- Create and update metrics until 100% complete.

Project Success - Metrics

- Total # of Section Succession Plans completed and submitted in 2025. Compare to 2024.
- Total # of Succession Plans that have been reviewed.
- Total # SSPs that have been provided feedback.

Progress

Milestone	Target Completion	% Complete
Task 1 – ACs will email current SSP guidance to all Section Leadership.	1Q2025	0%
Task 2 – ACs will disseminate sample SSP to all Sections.	2Q2025	0%
Task 3 – ACs will collect SSPs and provide feedback as needed.	3Q2025	0%
Task 4 – ACs will follow up with Sections until all SSPs are completed, reviewed, and feedback given to Section Chairs.	4Q2025	0%

Risks and Recommendations

- Potential frustration of Section Leadership from excessive emails.
- Offer multiple virtual training sessions provided by SOSC or provide recording.



Goal 6 – Develop metrics for Section engagement with Student Branches.

Lead

SSC Chair Kristin Bing and RSAC Bailey Heyman

Detail

The goal here is to go beyond metrics and provide cookbook ideas for student branches who want to engage with sections.

Next quarter tasks to achieve goals

- Come up with 6 cookbook ideas with at least 1 for branches with active sections already having close relations, at least 1 for branches with active sections but no relations, and 1 branches without an active or large section

Project Success - Metrics

Project success will occur if at least three student branches look into implementing one of the ideas

Progress

Milestone	Target Completion	% Complete
Come up with cookbook ideas	Q1	
Publish 3 cookbook articles	Q2	
Publish 3 cookbook articles	Q3	
Publicize with student branches and gauge interest	Q4	

Risks and Recommendations

Risk of not choosing ideas of interest to current student branches, so recommend conducting an interest survey early



Goal 7 – Develop and prototype industry engagement activities

Lead

Director Grigorian & Binesh Kumar

Detail

Increase industry engagement with IEEE in Region 3 by identifying key value propositions and effectively marketing IEEE’s benefits to companies. Focus on fostering long-term collaborations and partnerships to support mutual growth and innovation.

Next quarter tasks to achieve goals

- Develop a list of key industries and companies in Region 3 to target for engagement.
- Establish relationships with CxOs and decision-makers
- Create a marketing package highlighting IEEE’s value propositions and benefits for industry collaboration.

Project Success - Metrics

- Number of companies contacted and meetings conducted.
- Number of partnerships or collaborations initiated.
- Attendance at webinars or events organized.
- Number of follow-ups and ongoing discussions with decision-makers.
- Feedback and testimonials collected from industry participants.

Progress

Milestone	Target Completion	% Complete
Create company target list	2/31	
Form an R3 IEC committee and develop marketing pkg	3/31	
Establish initial partnerships	5/31	
Host 2 industry-focused webinar/event through IEC	9/31	
Secure 5 Long-Term Industry Partnerships	12/31	

Risks and Recommendations

Risks:Low attendance or participation in events..Limited resources for executing outreach and events.
Recommendations: Leverage existing IEEE member network to promote events and establish connections.Use targeted marketing strategies to highlight specific benefits to industries.Collaborate with local IEEE chapters to pool resources and extend reach.Form a IEC Committee



Region 3 Goal 8:

Provide an engaging and surplus-generating SoutheastCon 2025 and other Region/Section sponsored conferences and plan for similar success in 2026-29

Lead

Conference Committee Chair Joe Juisai

Detail

- Complete 2027 selection process Conduct successful Concord 2025 conference
- Prepare Huntsville 2026 and TBA 2027 for success
- Begin planning CaribCon w/ Region 9
- Publish initial plans for CaribCon 2026/2027 jointly with Region 9
- Assist OUs interested in SoutheastCon 2028 and 2029 with proposal submission
- Evaluate and endorse 2028 and 2029 proposals
- Prepare “Section Conference” playbooks for R3 OUs (on behalf of Section Support)
- Assist sections in planning and executing “Section Conferences”
- Complete 5 “Section Conferences” in 2025

Next quarter tasks to achieve goals

- Prepare endorsement package for FinCom and ExCom
- Complete Section Conference playbook
- Announce SoutheastCon 2027 location selection

Project Success - Metrics

- Complete endorsements of 2027 location selection in January
- Formalize selection of 2027 location at Concord 2025
- Complete “Section Conference” playbook in February

Progress

Milestone	Target Completion	% Complete
• Complete “Section Conference” playbook	1Q2025	75%
• Complete 2027 selection process	1Q2025	80%
• Conduct initial planning session for CaribCon 2026/2027	2Q2025	Not Startyed
• Conduct 2028/2029 evaluation process	3Q2025	Not Started
• Assist OUs with planning and executing “Section Conferences”	3Q2025	Not Started
• Complete 5 “Section Conferences” in Region 3	4Q2025	Not Started

Risks and Recommendations

- Ability to announce 2027 location selection in January
- Planning and execution of Concord 2025
- Lack of engagement by Region 9 or Region 3 OUs for CaribCon
- Lack of interest by OUs to host 2028 or 2029 conferences

Goal 9 – Engage members through new events and (micro-)volunteering opportunities.

Lead

SSC Chair Kristin Bing

Detail

Add articles to R3 cookbook at kb.ieee.org/r3

Next quarter tasks to achieve goals

- Assign leads (with their agreement) and set article expectations for the following topics:
 - Organizing a Section conference (Joe J)
 - STEM day (LaRhonda J. & Chauncey P)
 - Improv workshop (Tamseel?)
 - Merit Badge workshop (Kristin B)
 - Humanitarian (SIGHT/HA/Smart Village)
 - Networking event with another local non-IEEE society or organization (Theresa?)
 - Chapters Fair (Jill?)
 - How It's Made Tour
 - Family Science Night (Melody R)
 - Sr Member Roundup at local employer (Anthony or David)

Project Success - Metrics

- Providing at least 10 new or substantially updated cookbook entries

Progress

Milestone	Target Completion	% Complete
Assign all articles assigned a lead	Q1	
Get drafts from all leads	Q2	
Get revisions from second reviewer for all articles	Q3	
Ensure all articles posted to kb.ieee.org/r3	Q4	

Risks and Recommendations

- Risk that Sections will not know about cookbook or find them too daunting
- Publicize by leveraging R3 member communications committee
- Break into micro-volunteering bullets

