



IEEE INSTRUMENTATION AND MEASUREMENT SOCIETY

CHAPTER CHAIR REFERENCE GUIDE

1. INTRODUCTION

This reference guide is intended to assist you in your role as a Chapter Officer. It relies on and derives from the IEEE Chapter Chair Reference Guide, which should be referred for any information not included in the present document.

This guide will explain your responsibilities as a Chapter Officer, and give guidelines for the conduct of business and activities. Please contact IEEE I&M Chapter Chair Liaison if you have suggestions on how to improve the organization and/or content of the document.

2. CREATING A NEW IEEE SOCIETY CHAPTER

To form a new IEEE Society Chapter, the Chapter Organizer must gather 12 or more signatures from IEEE Members on a Society Chapter petition. Signers must be members of the Society, and higher grade members (no students, nor affiliates).

It is suggested that more than the specified amount of names and signatures be included to ensure that all petitioners qualify, thus speeding the petition's processing.

The Organizer is responsible for contacting the potential Chapter members, discuss with them the scope and interests of the Chapter, prepare the petition and a business plan that includes mission/goals, planned meetings and activities for first 6 months, and collect the signatures.

Chapter Organizers can ask the I&M Society Chapter Chair Liaison to contact the Society members of their Section.

The main information for chapter formation process is reported below. For alternate type of Chapters, including members from different Societies or Sections, please refer to Sec. 3.

2.1 CHAPTER FORMATION

The petition to establish a Chapter shall contain the following:

- 1) Name of the Geographic parent (Region, Section(s), Geographic Council).
- 2) Name of the sponsoring Technical parent Society(ies)/Technical Council.
- 3) Name of the organizer (who becomes interim Chair pending election of a regular Chair at a later organization meeting). The organizer shall be of an IEEE Graduate Student Member or of higher-grade status and must be an IEEE member.
- 4) Signatures of at least twelve (12) IEEE members, in good standing, of Graduate Student Member, Member, Senior Member or Fellow grade who are members of the Society(ies) and Section(s) involved. In lieu of their signatures on the petition, IEEE will accept an email message from an IEEE member stating their agreement to the formation. These emails must include the name of the member, IEEE membership number and a brief statement of support of the petition. These messages are to be sent to



the petition organizer who is requested to cut and paste these emails, preserving the email header information, into one document. A suggested member petition signature form can be found on the I&M Society web site (<http://ieee-ims.org/membership/chapter-activities>).

- 5) A business plan that includes mission/goals, planned meetings and activities for first 6 months.

The completed petition shall be submitted to the Geographic parent (Section/Council) Executive Committee for written approval. Then it shall be forwarded with this written approval to the IEEE Member and Geographic Activities (MGA) staff using the following contact data.

Email: petition@ieee.org

Fax: +1 732 463 3657

Mail: IEEE Member and Geographic Activities Geographic Unit Operations

445 Hoes Lane

Piscataway, NJ 08854-4141

USA

Phone: +1 732 562 5511

2.2 APPROVAL PROCESS

- 1) MGA staff will review the petition and work with the organizer to resolve any discrepancies. The Chapter will be considered established after MGA has ascertained that the Regional Director and the Society/Technical Council President(s) have no objections to the formation of the Chapter.
- 2) Following approval, the Section Chair, the Chapter Organizer, the Regional Director and the President of the Society/Technical Council will be notified. The Chapter formation will be noted in the Report of the Managing Director at the next meeting of the MGA Board.

3. JOINT SOCIETY/SECTION CHAPTERS:

Joint Chapters are a helpful option when trying to form a Chapter where there are not enough members of a Society in a particular Section. In this situation, the Chapter Organizer can either expand the Chapter's geographical boundaries to include a neighboring Section, or expand the technical focus of the Chapter to include another Society's (or Societies') field of interest.

Joint Society Chapters are those comprised of two or more Societies (example: France ED/AP/MTT Chapter). Existing Chapters often become Joint Society Chapters when they find that some of their members are involved in technology related to another Society's field of interest. Joint Society Chapters also provide a broader perspective of interest and potential events and information sharing for the members.

Joint Society Chapter Chairs should ensure that Chapter activities reflect the interests of both (or all) Societies and all members from each participating Society should be invited to all Chapter events. Joint Society Chapters may receive support from each of the Societies represented in the Chapter see the section on financial management of the IEEE Reference Guide for more information.

Joint Section Chapters are those for which the membership is across the boundaries of two or more Sections (example: Long Island/New York Section AP Chapter). Only one Section is the administrative "parent". The administrative parent Section is responsible for making sure the Chapter's activities are reported, and receives the rebate to be passed along to the Chapter.



Joint Section Chapters must invite the Chapter members from all involved Sections to all of the meetings and the Chapter Chair should develop a good working relationship with the leadership of those Sections.

Often Joint Section Chapters seem like a good solution, but they are frequently under-utilized as they rarely involve the members of both Sections as originally intended. A Joint Society Chapter is more likely to serve all of its members and function as intended.

See the IEEE Reference Guide for more information about Joint Chapters.

Further detailed information on expanding a Chapter to a Joint Chapter, or splitting a joint Chapter into individual Chapters, can be found at:

http://www.ieee.org/societies_communities/geo_activities/units/index.html

4. YOUR RESPONSIBILITIES AS A CHAPTER OFFICER

4.1 MANDATORY REQUIREMENTS FOR IEEE CHAPTERS

The job of a Chapter Chair includes the successful completion of a few requirements to satisfy IEEE and IMS regulations and maintain “active” status. These tasks and how to complete them are covered throughout the reference guide and are listed here for quick review.

- Chapter must maintain a minimum of 10 Members.
- Chapter must report officers (Chapter Chair) annually to the administrative Section and to the Society.
- Chapter must report all meetings annually to IEEE headquarters and the administrative Section using the L-31 form at <http://www.ieee.org/L31>. A minimum of two technical meetings per year is required to maintain viability.
- It is recommended that the Chapter set-up and maintain updated a web site publishing the most relevant information about the Chapter life. See section 4.4 for more information on how having a web space hosted on IEEE servers.
- Chapter Chair must send to the Society a filled-in Chapter Report Form (that can be found on <http://ieee-ims.org/membership/chapter-activities>) at least once per year, submitted to the Chapter Chair Liaison no later than April 1st, reporting the activities carried out during the previous year.
- Chapter Chair must fulfill the duties and responsibilities outlined in the Chapter Chair job description (Attachment 1).

4.2 LEADING A SOCIETY CHAPTER

The IEEE is one of the world’s largest volunteer organizations and it is through the work of the local Chapter officers that the work of the IEEE and its Societies is accomplished. To accomplish its goals, the IEEE and its Societies are dependent on the involvement of its members through the local Chapter leadership. The Chapter Chair’s ability to motivate volunteers to help with events such as meetings, seminars and community work is crucial to their success. Help navigating the IEEE resources available to you as well as a few hints on working with volunteers are offered.



4.3 GATHERING YOUR MEMBERSHIP DATA

Your Section and Society leadership has all contact information for the members of your Chapters. Contact your Section SAMIEEE (SAMIEEE Section Access to Member Information) representative or the I&M Society Chapter Chairs Liaison (See Section 6.2) for a list, or you can use the SAMIEEE program yourself.

The SAMIEEE online IEEE Member database is available to all Chapter Chairs. You may access the contact information including address, phone numbers, and e-mail for any person in your Chapter.

Instructions, access and a schedule of online courses for using SAMIEEE are online at: <http://www.ieee.org/samieee>

A query for Chapter membership data is pre-arranged in SAMIEEE. Once you are logged in, simply click on the link "Corporate Documents" and then click on the file called "Current Society members in a Section with Contact information". When a blank screen comes up, click on "EDIT" (at the top right) and then click "Run Query" (bottom right). Find your section in the list when the prompt comes up and then click on "Society Code" in the prompt and choose your Society. Finally, click "OK" and let the system run for several minutes. The results will be the list of all Members in your Section in your Society. Click on "Download" and it will open a copy in MS Excel.

There are very detailed directions in the User Guide and there are classes offered regularly online. For more information, go to: <http://www.ieee.org/samieee>.

4.4 IDENTIFYING YOUR SOCIETY AND SECTION LEADERSHIP

All IEEE volunteers can view the IEEE Organization Rosters for information on Society and Section leadership. Society information is in "Part II: Technical Activities Roster", Section and Chapter information can be found in "Part III: Geographic Roster". The rosters are at: <http://www.ieee.org/roster> and can be accessed using your IEEE web account user name and password.

There is a name-search function that can be used to find volunteers in the IEEE Organization Rosters. Searching for a name will return that person's contact information and current volunteer positions as listed in the IEEE Organization Rosters.

Chapter Chairs and Co-Chairs are the only chapter officers listed in the rosters.

The I&M Society Chapter Chairs can refer directly to the Chapter Chair Liaison for any kind of information concerning the Chapters and the Society leadership.

4.5 WORKING WITH VOLUNTEERS

Recruiting Volunteers: Try to involve all members in the work of running the Chapter. Actively involve new members and avoid the natural tendency to rely on the same people year after year. Asking for volunteers at the meeting may not be as effective as a one-on-one request when the Chair can discuss why that volunteer is the best person for the task. For more information on volunteer recruitment, go to www.ieee.org/vol-recruit.

Spread the Work Around: Asking a volunteer to put on a meeting or seminar may appear to be a daunting task. The work should be divided equally among the members such as: lining up speakers, publicity, registration and local arrangements for the meeting place and hotel accommodations. While it may be easier for the Chair to do all of these things, recruiting help from the membership will help strengthen the local organization and encourage participation. For large events, a committee may be more appropriate than a single volunteer due to the workload.



Motivate the Volunteers: Because there is no paycheck, what works in business does not always work for volunteers. Allow the volunteer to take ownership of a project and use their creativity in solving problems and issues. Although some volunteers may need to be told what to do in all cases, most will resent interference in the work they are doing, or do nothing for fear of making a mistake. Try to work towards a consensus among the volunteers rather than passing down a decision. Recognize that if the volunteer quits, the organization has lost a potential future leader and you may end up doing their work.

Diversify the Organization: IEEE technical societies serve a diverse group of professional and academic interests. Involve people from the different industry and educational organizations in your area. Take care to avoid creating the perception that the local Chapter is run by one company or a small exclusionary group.

Recognize the Work of Volunteers: Helping the local Chapter can involve a lot of hard work. Recognition of that work is important. Examples include: public recognition at a meeting, wall plaques, certificates or inexpensive gifts such as a coffee mug, or pen and pencil set with appropriate IEEE logo. The volunteer will appreciate the recognition and it will help motivate other members to participate in events. A local print shop or trophy shop will have some excellent inexpensive ideas for gifts. "Chapter Chair" pins, "Past Chapter Chair" pins, plaques and certificates are available from IEEE. More information and an order form can be found at www.ieee.org/scsproducts.

Recognize Time Conflicts: Since family, work, and community activities compete for the time of a member, Chapter Officers should schedule meetings to accommodate their members' schedules. Find out what time your Chapter membership is available. Talk to members who have stopped coming to meetings regarding meeting start times. Surveys of members concerning meeting times will provide valuable feedback.

4.6 MAINTAINING CONSTANT COMMUNICATION

Constant communication with your membership, your section and your society is an excellent way to foster an active Chapter. Contact information for your Chapter is available from your Section or from IEEE's SAMIEEE Membership database (see the Section 4.3).

Your IEEE Section and Society can publicize your Chapter's meetings and events in its newsletter (see also Section 6.1) or other publication, or on their web page. Your Chapter can have its own web page with up to 30MB of space, hosted for free on the IEEE Entity Web Hosting server (<http://ewh.ieee.org>). The I&M Society will provide links on its web pages to the Chapter website. If you wish to create a "re-direct" in order to provide a simple redirect (such as <http://www.ieee.org/chapters>) you may do so by reviewing the web tools available on the EWH site (<http://ewh.ieee.org>).

E-Notice Service: Your Section may also utilize the "E-Notice" service, which allows them to send out an electronic notification (recommended no more frequently than on a monthly basis) to all Section members. Chapters may wish to include their meeting notices in the E-Notice. Contact your Section Secretary or Section Newsletter Editor for more information.

Functional E-mail Alias: You can set-up a functional alias for your Chapter, so that members will have only one email address to remember for all communications. The email alias is then directed to the current contact from year to year. An example would be: germany.pes@ieee.org

4.7 PLANNING SUCCESSFUL MEETINGS

Putting together a successful meeting involves:

- Selecting a format
- Selecting a subject



- Finding a good speaker
- Publicizing the meeting

Selecting a format: Formats which you might consider including:

- Formal lectures
- Dinner meetings with an after dinner speaker
- Field trips to industry sites
- Breakfast meetings with a speaker
- Tutorial sessions
- Social events (picnics, pizza parties, etc.)
- Workshops or symposia technical visits
- Technical community work
- Technical lectures to electrical engineering and computer students
- Joint meetings with other technical groups
- IEEE Standards meetings

The amount of effort required to organize each of these gatherings varies significantly. A formal lecture requires only that a speaker and room be found and that the meeting be publicized. In contrast, an all day workshop or symposia can involve months of planning. Typically, the meeting format that requires the greatest effort also stimulates the most professional interest. A mix of meetings using different formats is suggested.

Remember that a Chapter is required to hold a minimum of two (2) technical meetings each year in order to remain viable and to be eligible for the funding available as part of the Section Rebate. An educational or professional meeting should be reported as a technical meeting if the content is of a technical nature.

Selecting a subject: The obvious choice of subject for a group of microwave engineers is microwave engineering. Within that broad field, however, many topics may be of greater interest than others. In choosing the subject you should consider the mission of local industrial groups, university programs and government laboratories. It may also be useful to scan articles in the most recent copies of your Society's publications for ideas of timely subjects.

Finding a good speaker: There are a number of sources of good speakers for a Chapter meeting. You might consider:

- Local industrial leaders speaking on their view of future trends in the industry.
- Local engineers, faculty or graduate students discussing recently published out-standing work.
- Local engineers discussing recently completed work in an important emerging area.
- University administrators discussing the future of education in the field
- Co-workers who are working on or have completed a major study.
- Visiting engineers/consultants who are experts on an important topic
- IEEE Resources

A source of outstanding speakers available to your Chapter is Society Distinguished Lectures. This program is an excellent way to obtain good speakers for your Chapter. See Section 6.3 for more information.

Please note that IEEE Policy prohibits payment of more than a speaker's travel expense; honoraria and stipend payments are not permitted.



Publicizing the meeting: Without publicity, your meetings will not succeed. A significant portion of your Chapter's efforts (and some budget) should be directed at providing publicity for your meetings. Some ways of publicizing meetings in advance include:

- Printed flyers circulated and posted wherever interested individuals might see them.
- Advertisement in Society Newsletters and on Society websites.
- Advertising in local newspapers.
- Announcements in your IEEE Section Newsletter, and on the Section and/or Chapter web site.
- Letters or announcements sent directly to local IEEE members by Society affiliation.
- More information about media contacts and other forms of outreach are available from the IEEE Publicity Guide (<http://www.ieee.org/publicityguide>)

Email addresses for your Chapter membership can be obtained from the online SAMIEEE (Section Access to Member Information) program or by asking them to the Chapter Chair Liaison.

5. IEEE FINANCIAL SUPPORT FOR YOUR CHAPTER

5.1 SECTION FINANCIAL SUPPORT:

IEEE Sections are responsible for the formation of local Chapters and Chapter support. Your IEEE Section receives \$200 for every active Chapter that has submitted all of their required reporting and held at least two (2) technical meetings in the previous year. In addition, the Section receives \$1.50 for each Affiliate in the Section.

An additional bonus of \$75 is provided for Chapters reporting six (6) or more technical, educational, or professional meetings. These funds are intended to support the work of the technical Chapters. If your Chapter is not receiving (at a minimum) this level of support from your Section, please contact your Regional Chapter Coordinator.

Please report all of your meetings (see "Reporting Meetings") so that your Chapter receives the support intended. To find out the names of your local Section Officers, check the online geographic roster (<http://www.ieee.org/roster>). If you are a current Chapter Chair, you can access the roster using your IEEE web account.

5.2 SOCIETY FINANCIAL SUPPORT OF CHAPTERS

The I&M Society is happy to support Chapters financially. There are a number of initiatives that may be funded by the Society. Visit <http://ieee-ims.org/membership/chapter-activities> and select "Chapter Funding" for more information about financial support from the I&M Society. Financial support is available for both regular Chapter activities and for special events.

6. SOCIETY'S RESOURCES AND IEEE ADMINISTRATIVE SUPPORT

IEEE I&M Society support of local Chapters is important, both to benefit Chapters and the sponsoring Societies, to ensure their future leadership. In order to improve bi-directional communication with Chapters, the I&M Society provides several possibilities.



6.1 CHAPTER ACTIVITY AWARD AND PUBLICITY

Planning and coordinating activities for a Chapter is a significant effort. You and your members who have helped you deserve recognition. In addition, you have probably had to develop some creative solutions to organizational problems from which Officers of other Chapters could benefit.

A specific I&M Society Annual Outstanding Chapter Award has been established to recognize significant performance of Chapters. Visit <http://iee-ims.org/membership/chapter-activities> and select "I&M Society Annual Outstanding Chapter Award" for more information about the award.

You may publicize your Chapter activities in the Society Newsletter (<http://iee-ims.org/publications/im-society-newsletter>) especially when you have spent time organizing a major event such as a work-shop, trade show or symposium. Society newsletters are made available free of charge to every member of the Society.

6.2 SOCIETY CHAPTER COORDINATORS

The Society Administrative Committee designates one member of the Society to serve as the Chapter contact. That person is usually listed as Chapter Chair Liaison. Visit <http://iee-ims.org/membership/chapter-activities> for contact data.

6.3 DISTINGUISHED LECTURER PROGRAM

The I&M Society offer financial support to their Chapters if they want to arrange meetings/seminars with speakers who are among the Distinguished Lecturers. The I&M Society DL Program rules are available at <http://iee-ims.org/education/distinguished-lecturers-program>.

6.4 CHAPTER CHAIR SUMMIT

The I&M Society holds an annual general Summit for Chapter Chairs just before IEEE International Instrumentation and Measurement Technology Conference (I²MTC). Participating the Chapter Chair Summit is a wonderful opportunity to share common experiences with other Chapter Chairs and enhance your relationship with the Society. Moreover, the I&M Society may provide limited travel support to Chapter Chairs who wish to attend the Summit. For more information about the Summit, please contact the Chapter Chair Liaison.

6.5 CHAPTER PARTICIPATION IN SOCIETY CONFERENCES

The I&M Society and the various Society committees hold conferences and meetings all over the world. Often, the volunteer conference planner has little understanding of society Chapters or no knowledge about the valuable support a local Chapter can provide to a meeting, however, in many cases Chapters and planners have worked closely to coordinate successful conferences to the benefit of both the conference and the Chapter. This is known as cross endorsement. To facilitate cross endorsement, Chapters should track conference activities through a regular on-line search and contact the Section immediately upon learning that a conference is to be held locally. If the IEEE conference management services has been notified that a conference is taking place, one e-mail is sent to the Section Chair (copied to the Section Vice Chair, Region Director, Conference Chair and the sponsoring Society) and the event is listed in the IEEE Conference Search at: <http://www.ieee.org/conferencesearch/>

6.6 IEEE REGIONAL ACTIVITIES RESOURCES AND ADMINISTRATIVE SUPPORT

- Regional Activities staff monitor activities in the more than 1300 IEEE Chapters.
- Notification of inactive Chapters is sent automatically to Society Presidents, Executive Directors, Chapter Coordinators, and Division Directors, as well as Region Directors, Section, Council and Chapter Chairs.



- The Section/Chapter Support Web Site (<http://www.ieee.org/scs>) provides information about the resources and support available for unit officers and volunteers.
- Virtual Community: The Section-Chapter Volunteer Forum is an online community for volunteers to share best practices and engage in discussion related to their geographic units' activities. <https://www.ieeecommunities.org>

6.7 PRINT RESOURCES

Adding to the society resources that can be found on the web page <http://iee-ims.org/membership/chapter-activities> the IEEE provide additional printed resources for Chapters.

Regional Activities: Publishes several guides to assist Chapters; each Society should be aware of these guides and make them readily accessible to their Chapters. <http://www.ieee.org/organizations/rab/scs/Resources/Publications.htm>

These guides include:

- Program Resources Guide – Provides information on Chapter officer training, membership retention, educational products, electronic services, etc.
- The SCOOP – Monthly update on issues of interest. Twice a year the newsletter is devoted to financial information. That edition is also circulated to Section Treasurers.
- Geographic Roster: Produced online to identify officers of all geographic entities, including Chapter Chairs. Updated bi-weekly.

Technical Activities: Documents made available from Technical Activities include:

- Chapter Funding Guide: A summary of all funding provided to Chapters by IEEE Societies. <http://www.ieee.org/portal/pages/tab/cha/fund.html>
- Chapter Opportunity Analysis: A list provided to Society Chapter Coordinators upon request indicating Sections where Society membership is at a sufficient concentration to support a healthy Chapter.
- Chapter Web Page: A web page which provides links and information useful to a Society Chapter Chair. <http://www.ieee.org/chapters>

7. FURTHER SERVICES

7.1 MEMBERSHIP DEVELOPMENT

Attracting new members will bring growth and vitality to your Chapter. Both IEEE and I&M Society Membership Development Staffs can be consulted on issues concerning effective ways to attract new members. Membership development material is also available from the IEEE Membership Development Staff.

IEEE Membership Development Contact information:

IEEE Regional Activities

445 Hoes Lane

Piscataway, NJ 08854

Phone: +1 732 562 5507

Fax: +1 732 981 0225

membership.development@ieee.org

www.ieee.org/ra/md



IEEE Instrumentation and Measurement Society Membership VP contact information:
<http://iee-ims.org/membership/membership-development-committee-activities>

7.2 IEEE FUNCTIONAL EMAIL ALIASES:

To help facilitate communication between members and geographic units, the IEEE has established a functional email alias option. With this service, a Chapter can maintain one email address no matter how often it changes officers. Example: chicago.pes@ieee.org or france.ems@ieee.org. For more information, visit:

<http://www.ieee.org/organizations/rab/functionalalias.html>

7.3 IEEE VOLUNTEER RESOURCES WEB PAGE

The IEEE has a Volunteer Resources web page that provides information for volunteers involved with Chapters, conferences, publishing or any other IEEE activity. Visit <http://www.ieee.org/organizations/vols>

7.4 REGIONAL CHAPTER COORDINATORS

Does your Region have a Chapter Coordinator? It's important to maintain contact with these volunteers. They can offer valuable advice, serve as a resource, and provide a voice to Chapter concerns at the Region level. Check your Region's roster on the web, or contact your Region Director to identify your Regional Chapter Coordinator. Contact sec-chap-support@ieee.org for more information.



ATTACHMENT 1

SUMMARY OF DUTIES AND RESPONSIBILITIES OF CHAPTER CHAIRS

- A. In possession of and familiar with the IEEE Constitution, Bylaws, RAB Operations Manual and the Section Bylaws (the Chapter is managed according to the administrative parent Section's bylaws).
- B. Presides at meetings of the Chapter and the Chapter Executive Committee.
- C. Operates the Chapter to maximize satisfaction of Chapter member needs with the resources available.
- D. Develops and presents plans for meeting members' needs to the Chapter Executive Committee for review.
- E. Identifies appropriate volunteers and presents their appointments to the Chapter Executive Committee for review.
- F. Insures that all Chapter Officers and Committee Chairs are properly trained for their jobs.
- G. Signs off on financial report where appropriate and confirms all reporting accurate and submitted in a timely manner.
- H. Insures satisfactory performance from the other Chapter Officers and the Chapter Committee Chairs.
- I. Prepares an annual report of Chapter Activities for submission to the Section Secretary, Region
- J. Prepares and submits an annual report to I&M Society Chapter Chair Liaison using the Society report form.
- K. Represents the Chapter at all IEEE gatherings.
- L. Transfers Chapter records to the new Chapter Chair at the end of mandate term.