

Region 3 First Year Member Process

Overall Goals of the Project

For the past few years, IEEE and Region 3 have been losing a significant number of members after their first year of membership. One of the main reasons cited is that non-renewing members do not find “value” in the membership. This topic of “value” has been discussed in a number of forums, including the Region 3 Annual Meeting, and the general consensus is we, the Section Leadership, can help stem the tide in this trend and even reverse it, if we all make an effort to welcome new members, get to know them and make sure we are offering them opportunities to really experience IEEE for what we know it to be – our professional home.

This document is meant to provide a guideline on how we, the Region and Section leadership, can reach out and engage new members. Though this document is not set in stone as each Section will have their own needs, challenges etc., it does serve as an excellent starting point for Sections.

With these points in mind, the goals of this process are:

1. To Grow and develop the member as an integral part of IEEE on a personal level by finding out:
 - a. Who the member is
 - b. Why the member is here
 - c. What does the member want/expect from their membership?
 - d. How membership fits with where they want to go
 - e. What does IEEE do currently and subsequently need to implement to fit the member’s needs
2. Make personal contact with 1st year member

**Not necessarily about going after the first year member as a group.
Treat them as individuals.**

Project Team Outreach to Sections

The Region 3 ExCom set up a project team to develop this process guideline. Although this Section focuses on ways for the ExCom committee to engage the Sections, there are some excellent points ALL Sections should consider.

Goals of the First Year Member Project (FYME) Team:

- 1) FYME Team to Contact their own Section ExComs
- 2) Identify appropriate Section ExCom Volunteers to discuss the project with
- 3) Identify a "champion" for the cause in the Section to take on the duty of contacting their Section's new members
- 4) Have this Champion contact 1st year members. The objectives of this contact are described in the "Section Outreach to New Members"

Points to consider

- 1) "Membership Development" is really a function of networking.
 - a. Identify people who want to expand their network.
 - b. This project is **GREAT** for someone to practice their networking skills and to get to know members.
- 2) The realities of this project are:
 - a. Most Sections in Region 3 only draw a few new members a week.
 - i. Right now, task seems daunting as we are almost at the end of the 2015 Membership Development Cycle.
 - ii. **It is better late than never.**
 - b. At both the Region and Section level there are a number of projects/roles (YP, Students, Societies, PACE, WIE, etc.) looking for the same things: Volunteers and members to participate
 - i. All of these, though separate ideas, have the same outcome: **SERVE THE MEMBER**
 - ii. Why not pool the resources?
 1. Region 3 Goals for Sections were laid out at the annual meeting
 2. Find groups to partner with so as to not duplicate the effort
- 3) Can't find someone in the ExCom? Reach out to the members and **ASK.**

Section Outreach to New Members

- 1) Prep for the call
 - a. Pull list of new members from the Section Vitality Dashboard
 - b. Pull New Member Interest data using the pre-defined SAMIEEE query
 - i. (MD) New Member Interest Info for Active IEEE Members
 - c. Suggest the Region Project Team does this for their Section in advance of the call
 - d. Have a broad knowledge of what the Section has going on currently
 - i. Use the meeting finders available via IEEE
 - e. Opportunity here for Region/HQ to push the necessary reports to the Section
- 2) Get the new member to engage with the Section
 - a. KEY POINT: Members need to be cultivated which will take time
 - b. This first contact is an excellent start
 - c. Get an initial read on the member:
 - i. What they don't want is usually the easiest to start with
 - ii. Then try to get an idea of what they want out of their membership
- 3) Lay out an actionable plan for the new member as follows:
 - a. In the First two months, new members should:
 - i. Make sure they fill in their member profile via myiee; Serves two purposes:
 1. Gets them to think about their interests
 2. Section can query the data to deliver on what the member wants
 - ii. Have them check out the IEEE Getting Started page (www.ieee.org/start)
 1. Has a number of resources for new members to get acquainted with IEEE
 - iii. Have the new member sign up for the New Member Orientation given monthly by corporate
 1. Access to register for this training is available on the Getting Started Page
- 4) Other points to consider:
 - a. Send a welcome letter. A phone call is always better.
 - b. Invite them to section activities (technical, administrative, professional and social).
 - c. Invite them to be volunteers.

First contact with the new members

Each section chair and MD chair receives a reminder email from IEEE Services alerting them that their list of new Section members is available. The email has a link to the New Member list however a list of new members can be pulled at any time using the Section Vitality Dashboard. The details below outline using the link in the reminder email

- 1) Click the link in the email.
- 2) Once you get to the SAMIEEE page, insert your IEEE information account (username and password).
- 3) Now you are in the "New Members of IEEE" page. You can see the contact information and interest information of your new members that can be used to plan new strategies to encourage them to the local activities. The details available include Membership Grade, Address, Email Address, Phone, Society Affiliation and Reason for joining IEEE.

Section Name	Sub Section Name	Full Name	Join Date	IEEE Current Grade	IEEE Membership Description	Primary Address Line 1	Primary Address Line 2	Primary City	Primary State Zip	Primary Address Country	Email Address	Work Phone	Home Phone	Society Affiliation	Reason for joining IEEE	Region Code
Eastern North Carolina Section	Lower Cape Fear Subsection	Karin O'Neil	06/15/2015	Student Member	Member Since: Traditional	432 N. Sage Creek Rd		Swainboro, NC	29584-7787	USA	karin@sigmatel.com				Local Activities;	R3
		John Eugene McGhee	06/15/2015	Student Member	Member Since: Traditional	2137 W. 43rd St		Minden, LA	70564-9537	USA	john@sigmatel.com		2507952298		Technical Information; Professional Network; Career Opportunities; Local Activities;	R3
		Andy Phillips	06/15/2015	Student Member	Member Since: Traditional	300 W. 10th St		Wichita, KS	67204-0808	USA	andy@sigmatel.com		7133168910		Professional Network; Career Opportunities;	R3
		Whitney Knight	06/15/2015	Student Member	Member Since: Traditional	4432 Overlook Dr		Charlotte, NC	28217-1228	USA	whitney@sigmatel.com				Professional network;	R3
		Law W. Hirsch	06/15/2015	Student Member	Member Since: Traditional	132 Central Ln		Harrisburg, PA	17105-2238	USA	law@sigmatel.com			703070558	Technical Information; Professional Network; Career Opportunities;	R3
		Alexander Lee Pritchard	06/15/2015	Student Member	Member Since: Traditional	2124 Virginia Ave		Wichita, KS	67204-0808	USA	alex@sigmatel.com				Technical Information; Professional Network; Career Opportunities; Local Activities; Humanitarian Programs.	R3

SAMIEEE and the Section Vitality Dashboard

SAMIEEE is a Web-based ad hoc query tool that provides volunteers access to member data. It allows ad hoc querying, reporting, and downloading of IEEE's membership data to [authorized or designated IEEE volunteers](#).

Access the SAMIEEE tool using your IEEE member username and password to enter. The SAMIEEE can be accessed at: <https://analytics.ieee.org/analytics/saw.dll?bieehome&startPage=1>

Steps to create a new analysis:

1. New
2. Analysis
3. SAMIEEE - for Volunteers
4. Move the topics from the **Subject Area** to **Selected Columns**
5. Result
6. Filter the information in **Selection Types**
7. Export this analysis in PDF, Excel, PowerPoint and more.

Section Vitality Dashboard provides Section and other organizational unit leaders a monitoring tool that provides real-time, top-down status view of their section vitality metrics. To view the tool, you must have prior access to the SAMIEEE tool. All Dashboard links require you to have SAMIEEE access. Use your IEEE member username and password to enter. The dashboard can be accessed at: <http://www.ieee.org/vitalitydb>

When you first enter the dashboard, no results will display. You will need to choose and apply a Region and Section Name before the tables begin to run. Depending on your access, you could have more than one choice in the Region and Section dropdown.

The dashboard will “default” to your Region and Section.

Once selections are applied, all reports will automatically run. Results will appear as they complete.

If no data is found meeting the query criteria – No Results will be displayed

Use the dashboard to pull:

- **Member Tab:** View member information. Counts break out by grade and section, society membership and affinity groups counts by grade. Click on individual grade or grand total in the “Active Member Counts” table and you will open and view a contact list of those members.

- **Active Student Members tab:** View active Student and Graduate Student Members. Breakout is viewed by Section and then totals for individuals schools within the section. Clicking on the school counts will produce a contact list of student and graduate students for that school. Clicking on the section total will produce a list of all student and graduate students for that section.
- **Officers tab:** Selection of tables that list currently reported officers. If no data meets the requirements of the table, it will show "No Results". Volunteer History for active members produces a list showing all volunteer positions a member has held (current and past) that have been recorded on the IEEE data base.
- **Members in Arrears/Inactive tab:** Choose to view a list of Arrears or Inactive Members for your Section.
- **Pre-Arrears tab:** This report is for members who fall under the renewal year grace period every year which runs from January 1st through end February of each year. This report will populate with data after January 1st of each year.
- **Additional Member Lists tab:** Select a link to view your "Active Member List" and dashboards for "New Member List" and "All Geographic Member Statistics". View the "Member Loyalty" table to see which members in your section meet criteria for years of service awards. Contact information for Active Members without email. Contact lists of Affinity Group Members, etc.
- **Meeting Activity tab:** Click on a link to view selected meeting activity for your Section. Links open a new window directly to vTools Meetings table.