IEEE EPS Guide to CHAPTER DEVELOPMENT

A Chapter shall be a technical subunit of a Region, one or more Sections, or a Geographic Council. There may be single Society Chapters, joint Society Chapters, and Technical Council Chapters.

IEEE ELECTRONICS PACKAGING SOCIETY

EPS Guide to Chapter Development

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BACKGROUND: The IEEE is a non-profit professional association for electronic and electrical engineering with its corporate office in New York City and its operations center in Piscataway, New Jersey. It was formed in 1963 from the amalgamation of the American Institute of Electrical Engineers and the Institute of Radio Engineers. Over the years, IEEE has had many notable inventors, pioneers and Noble laureates as members, Thomas Alva Edison and Alexander Graham Bell, just to name two.

The IEEE designated fields of interest are: Engineering, Computer Sciences and Information Technology, Physical Sciences, Biological and Medical Sciences, Mathematics, Technical Communications, Education, Management, and Law and Policy. IEEE is divided into ten worldwide geographic **Regions** (see Figure above). Within the regions, there are many different types of local units, **Section** being perhaps the most often encountered unit type since every IEEE member is automatically assigned to a local Section, based on where the individual resides. **Chapters** are technical sub-units of one or more IEEE Sections. They consist of members from one or more *Technical Societies* or *Technical Councils* who share technical interests and geographical proximity. Chapters organize activities that typically include guest speakers, workshops, and seminars as well as social functions. Chapters provide Society members with valuable opportunities to network at a local level, enabling their personal and professional growth. Chapters are formed to serve IEEE members by holding meetings at the local level and they are established by petition to the parent geographical and technical organizational units concerned. Together, these units conduct over 10,000 meetings a year and enable members to network and explore their technical interests as a community.

Today IEEE has more than 350,000 members in 39 **Technical Societies** and **Technical Councils**. Retaining and growing an organization of this size requires dedicated engagement by all its members. The *Electronic Packaging Society (EPS)* is one of these 39 IEEE Societies. EPS is heavily increasing electronic packaging fields by embracing emerging and leading-edge technologies under its umbrella. The EPS is heavily engaged in membership growth. One of the key enablers for EPS growth is the continuity of its existing Chapters and the formation of new chapters worldwide to increase its global footprint.

This reference guide is intended to assist you in your role as a Chapter Officer. It will give guidelines for the conduct of business and activities, and explain some of the essential responsibilities of Chapter Officers. The information presented in this guide is available elsewhere on various IEEE websites and documents, but the ultimate purpose of this document is to summarize the most essential matters of operating a chapter to reduce your time required to find answers and get things going. If you have suggestions on how to improve this guide, please contact the *EPS Director for Chapter Programs*. If you have any questions or need support on practical matters of operating a Chapter, please contact your *Regional EPS Program Director*. Contact information ca be found on IEEE EPS website at https://eps.ieee.org/about/board-of-governors.html.

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INTRODUCTION

A Chapter is a technical subunit of a Region and they are associated with either a Technical Society or Technical Council. There may be single Society Chapters, Technical Council Chapters, or joint Society and/or Council Chapters. All members of EPS (and possible Joint Chapter Society) who belong to a geographic unit, which has formed the Technical Chapter, are considered Chapter members. A Chapter is comprised of a minimum of twelve (12) IEEE voting members. A member is considered *eligible for voting* when he/she is a member of the Society or Technical council (in the case of joint Chapters, at least one Technical Society or Council) and the membership is record in IEEE database by June 30 of the ongoing year. In the following, all references to "Chapter" are inclusive of both Chapter and Joint Chapter. Chapters shall conduct activities within the scope of the technical field of interest of the sponsoring Society/Societies. A Chapter functions in a manner similar to that of a committee of the Section.

The narrative is broken into seven sections that address questions that EPS members or Chapters may have with respect to existing chapters, new chapters, student chapters, conference sponsorship, special programs, and funding. The information presented in this guide is available elsewhere on various IEEE websites and documents. This guide should be reviewed biannually by the EPS Director of Chapter Programs, to ensure it provides the latest information.

Chapter Management

Chapters can be of two types: Student Chapters and non-student/regular Chapters. This chapter refers primarily to the non-student Chapters, hereafter referred simply as Chapter.

Chapter Committee and its Officers

Officers of the Chapter Committee shall be at least a **Chair**, a **Vice Chair**, a **Secretary**, and a **Treasurer**. The Chapter may combine the offices of Secretary and Treasurer if deemed necessary. Each member of the Chapter Committee shall be higher than Student Member of IEEE (i.e. either Graduate Student Member, (regular) Member, Senior Member, or Fellow) and a member of the parent Society. Officers of a Joint Chapter must be a member of at least one parent Society or Technical Council. Affiliate members cannot hold leadership positions in IEEE Chapters.

- The *Chapter Chair* shall serve as Chair for all meetings of the Chapter, the Chapter Committee, and the Chapter Executive Committee (ExCom) where such ExCom exists.
- The Chapter *Vice Chair* shall assist the Chair in the coordination of all Chapter activities. At the request of the Chapter Chair or in the absence of the Chapter Chair, the Chapter Vice Chair shall chair meetings of the Chapter, Chapter Committee, or Chapter ExCom.
- The duties of the *Chapter Secretary* shall include correspondence, keeping of the minutes of Committee meetings, mailing notices, and submission of meeting reports to the parent Section

Secretary or Secretary/Treasurer at the end of each year, and such other duties as assigned to him/her by the Chair.

- The duties of the **Chapter Treasurer** shall include the development of Chapter budget for approval by the Section, accounting of all Chapter funds, keeping financial records, and submitting a financial record to the Section.

Officer Terms and Eligibility: All officers shall be elected by Chapter members of Graduate Student Member, Member, Senior Member, and Fellow grade. Elections for all officers shall take place every one or two years. The term of office for all officers shall be in accordance to the election period. An individual may continue in the position until a successor has been duly elected and takes office. The term of office shall normally be from 1 January through 31 December. The consecutive period of service in any one office shall normally not exceed four years. All officers shall not serve in any one position more than six years in total. Exceptions to this rule require approval by the President of EPS.

The names of the newly elected/appointed officers (voting and non-voting) of the Chapter shall be reported to the IEEE MGA department, via the Section or Council Secretary, within 20 days following election/appointment. New officers or officer changes are submitted via the vTools.OfficerReporting tool. Access to this tool requires use of an IEEE Account.

Responsibilities of the Chapter Committee

The job of a Chapter Officers is focused on conducting technical activities to engage local members. A successful completion means satisfying a few minimum requirements to maintain "active" status for the Chapter. These tasks and how to complete them are covered throughout this guide and are summarized here:

- A Chapter must maintain a minimum of 10 Members (Graduate Student Members or higher)
- A Chapters are required to hold a minimum of two (2) technical meetings each year
- A Chapter must report their activities and roster of officers annually in a timely manner (see Chapter Reporting for more information)

Election of Chapter Officers

A *Chapter Nominating Committee* of three or more Chapter members (preferably not then officers of the Chapter Committee) shall prepare a slate of candidates recommended for the Chapter officers. Six months prior to the date of election, the Chair of the Chapter Nominating Committee shall issue a Call for Nominations through IEEE vTools VOTING for all positions. Chapter members should be allowed one month to submit their nominations. The Chapter Nominating Committee shall gather position statements and biographies of the potential candidates, as appropriate. The Chapter Nominating Committee must verify the candidates' willingness to serve and that all candidates are also registered members of the Chapter. The Chapter Nominating Committee will select candidates for each position to be elected at-large and submit the slate of candidates to the Chapter Committee for ratification. The slate of candidates shall be communicated to the voting members of the Chapter not less than six weeks prior to the election date via the IEEE vTools VOTING. Instructions on how to setup vTools VOTING for your election can be found here: https://vtools.ieee.org/welcome-vtools-voting-page/.

In addition to the candidates nominated by the Chapter Nominating Committee, individual voting members eligible to vote in such election may nominate candidates by *petition*. In accordance with IEEE Bylaw I-307.17, the number of signatures on a petition for a Chapter Officer position shall be required from 2% of the eligible voters, provided the electorate is less than 30,000 voting members. The petition shall be completed at least 28 days before the date of the election. The entire slate of candidates for office shall be communicated to the voting members of the Chapter not less than two weeks prior to the election date.

The election process must be by secret ballot. To vote in the election, an individual must be a voting member of the Society. A member is considered eligible for voting when he/she is a member of the Society or Technical council (in the case of joint Chapters, at least one Technical Society or Council) and the membership is record in IEEE database by June 30 of the ongoing year. The Chair of the Chapter shall submit the names of up to three members of the Chapter to serve as a Tellers Committee to the Chapter for approval. The Tellers Committee can be the same as the Chapter Nominations Committee. After the tally of votes, the Tellers Committee shall report the results of the election to the Chapter Chair. The Chapter Chair shall inform each candidate for office of the results of the election prior to announcing the results to the Chapter and the Society.

Chapter Chair Meetings at EPS Flagship Conferences

EPS Regional Directors often hold Annual or Semi-Annual meetings for all Chapter Chairs either virtually in the form of web meetings or at EPS Flagship Conferences (ECTC in USA, EPTC in Asia, and ESTC in Europe). Such meetings are a great opportunity to share common experiences with other Chapter Chairs and enhance your relationship with the Society. Please contact your Regional (1-7&9, 8 or 10) Director for information on next Chapter Chairs meetings.

Leading a Technical Chapter

IEEE and its Technical Societies depend on the involvement of local volunteers to provide membership benefits through the local Chapter activities. The ability of the Chapter Committee 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 covered next.

- GATHERING YOUR MEMBERSHIP DATA: Chapter Chair and Chapter Vice Chair can have access to all contact information for the members of your Chapters though a visual business intelligence tool **IEEE OU Analytics**. You can access the contact information including address, phone numbers, and email for any person in your Chapter. Note that use of IEEE OU Analytics must be in accordance with the *IEEE Data Access and Use Policy*. OU Analytics training materials can be found here.

- COMMUNICATION TO MEMBERS: **IEEE eNotice** is an email-based communication service that has been developed for IEEE organizational units to facilitate distribution of newsletters, meeting notices, social events, and IEEE conference materials. The source of email addresses for

eNotice is the IEEE Membership Database. New members are automatically added, members who move to a new section are automatically transferred, and discontinued members are automatically omitted. Each message sent through the eNotice service gives the member an opportunity to opt out of future eNotices, which is required by some laws and regulation such as the General Data Protection Regulation (GDPR) in Europe. Brief video tutorials on eNotice can be found [here](#) and further instructions [here](#).

- IDENTIFYING YOUR SOCIETY AND SECTION LEADERSHIP: All IEEE volunteers can view the Officer Roster for an Organizational Unit. This information can be accessed through **IEEE vTools Officer Reporting** using your IEEE web account username and password. Instructions on how to use the tool can be found [here](#).

- REMOTE MEETING AND CONFERENCING: We recommend Chapter volunteers seeking to run virtual meetings use Google Meet. Find out more at: https://meet.google.com. More on remote conferencing can be found [here](#).

Practical Tips for Working with Volunteers and Chapter Vitality

A) **Recruiting and Retaining 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.

    In recruiting new members to join IEEE you may be asked to explain what IEEE is. Some ideas of for IEEE membership elevator pitch can be found [here](#). For more information on volunteer recruitment and retention, go to https://mga.ieee.org/resources-operations/geographic-unit/vitality/recruit. Some of the member recruitment and retention best practices identified in IEEE societies are share [here](#) and [here](#).

B) **Spread the Work Around:** Asking a volunteer to organize a meeting or seminar may appear to be a daunting task, especially when anyone does it for the first time. The work should be divided equally among the members, for example, the tasks of lining up speakers, marketing & publicity, registration and local arrangements for the meeting place and hotel accommodations (if necessary) can be distributed to different people. 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 required.

C) **Motivate the Volunteers:** Because there is no paycheck in volunteering, 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 many 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.

D) **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.

E) **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 may have some excellent inexpensive ideas for gifts. Chapter volunteer contribution recognition plaques and certificates may be available from EPS Regional Directors.

F) **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.

G) **Maintain 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 members is available from IEEE OU Analytics membership database and IEEE eNotice is an easy way to the whole Chapter member base. Your IEEE Section can publicize your Chapter's meetings and events in its newsletter or other publication, or on their web page. Your Chapter can have its own web page hosted for free on the IEEE Web Hosting server (http://ewh.ieee.org).

Chapter Communications

Communication is of critical importance in any organization. In this chapter we will go through some essential technical means of communication with Chapter members.

- **Chapter Website:** IEEE provides an easy-to-use [WebInABox](#) wizard to generate simple Chapter websites that are automatically updated. The result is a simple websites generated in an automated fashion with no dependence on webmaster availability. You must be an IEEE Officer (e.g., Section Chair, Webmaster or vTools Coordinator) in order to use this service. WebInABox tutorial can be found [here](#).

  IEEE also provides professional website hosting for IEEE organizational units at no charge. [IEEE Entity Webhosting](#) (EWH) is a service intended to meet the needs of Chapters that want to develop, create and maintain their own websites on an IEEE host. IEEE provides ready-made website templates for Chapters to utilize. Chapters are expected to

choose a single webmaster who is skilled in managing web contents. Chapters can also reserve their own website URL for the Chapter.

- **IEEE eNotice Service**: above mentioned eNotice service allows you to send out an electronic notification to all Chapter members. Chapters may wish to include their meeting notices in the eNotice. We recommend you keep the frequency of submissions at less than one message per month to avoid negative sentiment related to too frequent emails and the risk of members opting out from the email distribution.

- **Chapter Mailing List:** IEEE eNotice is a preferred tool for email based Chapter communication but sometimes it might be useful to create focused email lists for specified target groups. For this purpose, IEEE provides the listserv service. The service requires a separate IEEE listserv account.

  When communicating through this service, please pay attention to the frequency of mailings. It is recommended that you send at most three messages per event to your target group: *first* message, about a month before the event, where you introduce the event and ask the audience "save the date" from their calendars and possibly register, *second* (the first reminder) about two weeks before the event where you ask people to register, and *third* (the second reminder) a few days before the event where you inform about closing of registration and last chance to register. More frequent messaging becomes very easily irritating to the receivers.

  Another good practice is to use the web site as the main source of information in your mailings. Rather than attach potentially large PDF or graphic files, keep your messages short and simple and reference your website for more information.

- **Public Promotion of Events**: All events scheduled in vTools Events are showcased in IEEE Collabratec™ and can be promoted on websites and eNotices.

- **Functional E-mail Alias**: You can setup a functional alias for your Chapter at https://listserv.ieee.org, 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. Functional email aliases can also be registered to different Chapter Officer positions here.

Planning and Organizing Successful Meetings

Putting together a successful meeting involves selecting a format, selecting a subject, finding a good speaker, and publicizing the meeting

1. **Selecting a format**: 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.

Formats which you might consider include:

- Formal lectures
- Dinner meetings with an after dinner speaker
- Senior member promotion
- Field trips to industry sites
- Breakfast meetings with a speaker
- Tutorial sessions
- Social events (picnic, 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

A mix of meetings using different formats is suggested.

2. **Selecting a subject**: The obvious choice of subject for a group of electronics packaging is electronics packaging. 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. The golden rule of a successful event is: "*The topic and the caliber of the speaker brings the audience*."

3. **Finding a good speaker**: IEEE typically has a very good reputation widely and, therefore, speakers are quite often delighted to interact with members of IEEE and are interested in sharing their work. However, challenges with confirming speakers are most often related to speakers' schedules. Therefore, it is highly recommended that you approach the potential speaker well ahead of time, even as long as *six months in advance*. 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 outstanding 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 EPS Distinguished Lecturers. This program is an excellent way to obtain good speakers for your Chapter. Please note that IEEE Policy prohibits payment of more than a speaker's travel expense; honoraria and stipend payments are not permitted.

4. **Publicizing the meeting**: Without publicity, your meetings will not succeed. A significant portion of your Chapter's efforts should be directed at providing publicity for your meetings. Some ways of publicizing meetings in advance include:
   - Announcement on Chapter website
   - Letters or announcements sent directly to local IEEE members by eNotice service
   - Suitable social media channel such IEEE Collabratec® or LinkedIn
   - Advertisement in EPS Newsletters and on EPS websites
   - Announcements in your IEEE Section Newsletter, and on the Section website
   - Printed flyers circulated and posted wherever interested individuals might see them
   - Advertising in local newspapers
   - More information about media contacts and other forms of outreach are available from the IEEE Publicity Toolkit

5. **Listen to our audience:** listen to our audience and plan topics for your meetings that are close to their top interests. Attendee surveys are an excellent way to keep the pulse on their interest. Survey forms may include questions such as how did you learn about this meeting, value of tonight's presentation (on a suitable scale), degree of interest in the chosen subject area (on a suitable scale), quality of presentation (on a suitable scale), technical comfort level (on a suitable scale), ideas for topics to continue with, speakers / organizations to present them, would You be willing to give a talk?, if so, on what topic, ideas to improve the meeting, etc.

Financial Management of Chapter Funds

Responsibility for Chapter financial management shall rest with the Section or Technical Council, which shall have control of all financial and other assets of the Chapter in carrying out its activities. A Chapter may maintain its own accounting of income and disbursements, either within separate sub-accounts of the Section treasury or within a separate bank account as approved by the Section ExCom. Funds in such an account may include income received by the Chapter from Societies and Technical Councils and the Chapter's share of income and disbursements associated with programs sponsored or cosponsored by the Chapter and with operations of the Section. Such funds shall remain the designated assets of the Chapter.

A Chapter may petition the Section or Technical Council to establish and maintain its own separate bank account. Those Chapters having separate bank accounts shall submit a year-end financial statement to the Section by 15 January for the previous fiscal year.

Financial Support
IEEE and its Technical Societies offers IEEE Chapters financial support for activities such as organization of technical meetings, distinguished lecturer workshops, student activities, Chapter meeting, other forms of membership promotion, and administration of Chapter activities. The amount of each subsidy

depends on the nature and frequency of Chapter activities carried out and reported in the preceding year, and the growth prospects of the Chapter.

Seeking sponsorship from local companies is also recommended. For example, if a company operates in a technical domain close to that of the chapter, they are often willing to sponsor a Chapter meeting at their premises since it provides an opportunity to promote their company to relevant professionals.

It is also always a good practice to engage co-sponsors for Chapter events since it can significantly improve your chances for receiving additional support from other parties.

Support from IEEE Sections: Your local IEEE Section may be able to support Chapters with funding. The application procedures vary but the best way to get started is to look for Section web pages for more information. If no mention can be found, contact the Section Chair, Secretary or Treasurer. The possibilities to support Chapter activities may also vary with Sections but all Sections receive funds that are intended to support the work of technical Chapters. Thus, the minimum level that a Section should be able to support all its Chapters is about $200 annually.

Support from EPS Society: Existing Chapters may request an annual $1000 subsidy from the EPS Society while new chapters may request a $1500 subsidy for the first year (prorated to appropriate % for Joint Chapters). The Chapter must apply for the funding each year to support their activities. The request for funding is made through Chapter Subsidy Request smart sheet and can be submitted prior to an event or at the end of the year for all events at one time. After it is completed, it will be directed to either the Chapter Program Director or the Student Chapter Director for approval. Upon approval, funding will be provided to your official Chapter or Section or Branch bank account.

Reporting the use of funds

At the end of each calendar year or at the conclusion of an activity or activities, which have been subsidized, the Chapter or Student Chapter must submit a report to the Section or EPS Society. In the case of EPS funded events and activities, the report is submitted to EPS Director of Chapter Programs or EPS Director of Student Programs, respectively, using the format below for each activity organised. Note that the activities reported here must also be included in the annual Chapter report (see section Chapter Reporting).

Chapter Name: Date submitted:
Chapter Code: Submitter's Name:
IEEE Section: Submitter's Email:
IEEE Region Number:

REPORT ON ACTIVITY:
Title:
Category: *(technical [e.g. seminars, workshops, conferences], administrative [e.g. committee meetings, AGM], social or others)*
Date(s):
Description: *(Please give details of activity below and the benefits of the activity and attach photographs if available.)*
Attendance:
- Number of IEEE/EPS member attendees:
- Number of Non-IEEE Member attendees:
- Number of EPS Student Member attendees:

- Number of Non-EPS Students:

Funding: *(Please attach financial statement where EPS funds were provided.)*
- Was funding provided by EPS for this activity and if so, how much?
- Who else provided funding for this activity, and if so, how much?

Chapter Activity Reporting

In order to maintain viability and to ensure that all Chapters are meeting the needs of their members, each Chapter is required to submit annual reports. Chapters are required to hold two (2) technical meetings each year.

(a) Meeting activities reporting
- In order to maintain viability Chapters are required to hold at least two technical meetings each year (find out more on meeting reporting here)
- Meetings are reported in IEEE vTools Events (a tutorial can be found here, chapter 6 "Report (L31) a Past Event" is most likely the one that you'll be looking for)
- As you may notice, IEEE vTools Events includes tools and features much beyond reporting. It is highly advisable that you take it as your central tool for event management and use it regularly throughout the year.

(b) Officers reporting
- Chapter officers are reported via IEEE vTools Officers Reporting. This system is very self-explanatory but more information on meeting reporting can be found here.

(c) Financial reporting
- Chapters that report consolidated financials with the Section send their income and expense information (and year-end bank statements) to your Section's Treasurer.
- Chapters that manage their own bank account perform the financial report via NetSuite (find out more in here).

The deadline for reporting is typically the **third Friday in February** but please check exact deadline IEEE Geographic Unit Required Reporting & Rebates website.

NOTE: A Chapter may be put on probation if it does not meet the minimum required activities for a period of one year and it may be dissolved if reports are not submitted for three (3) consecutive years.

More information on meeting reporting can be found on IEEE Member and Geographic Activities: https://mga.ieee.org/resources-operations/geographic-unit/reporting-rebates/meetings

Organizing Seminars, Workshops and Conferences

Chapters bring technical meetings and opportunities for professional networking to members, where they work and live, through a variety of events, including evening technical talks, facility tours, workshops, seminars, and even conferences.

Seminar or a Workshop in the form of industrial visit

Organizing a half-day seminar or workshop together with a company or research institute is quite common amongst EPS Chapters. Such model may be particularly appealing for companies that are currently recruiting, coming out with new products or services, or generally growing their business, and looking to develop their brand image. This operation model is particularly viable for student chapters but also works very well with regular chapters.

Distinguished Lecturer Seminars

The EPS Distinguished Lecturer (DL) program aims at serving EPS Chapters by helping them to invite leading experts in their respective fields and Student Chapters to encourage new students to pursue EPS related fields and to join the EPS society. DLs are selected by EPS from the active members of EPS and are recognized experts in their field. They are often IEEE Fellows, award winners, and society leaders. The DL talk is a major event in the life of the inviting Chapter. The list of lecturers can be found on the EPS Distinguished Lecturer Program website and requests for a lecture can be made through the DL Request Form. Availability for a particular invited event is determined by the Distinguished Lecturer, based on her/his schedule. Therefore, timely arrangements well in advance of the planned visit are necessary.

Note that EPS provides funding directly to the DLs to cover travel expenses needed to reach event but any local expenses such as meals, hotel, local travel etc., are expected to be covered by the inviting Chapter. Chapters may apply additional funding from EPS or local IEEE Section (see "Financial Support" under Financial Management of Chapter Funds of this document). No more than two (2) DLs may be approved to receive funding for the same Chapter event. However, if the event is Technically Co-sponsored by EPS, only one (1) DL may be approved to receive funding. A Chapter is eligible for no more than two (2) DL visits each calendar year. For more information, please refer to the EPS Distinguished Lecturer Program website.

Chapter Participation in EPS Conferences

Members of EPS hold conferences and meetings all over the world. In many cases, Chapters and meeting/conference organizers have worked closely to coordinate successful meetings/conferences to the benefit of both the conference and the Chapter. As an example, a Chapter could volunteer to build an additional session in the conference agenda and promote it. This is known as *cross endorsement*. To facilitate cross endorsement, Chapters should track conference activities through a regular on-line search and contact the meeting/conference organizers upon learning that a suitable conference is to be held locally. If the IEEE conference management services has been notified that a conference is taking place, you can find the event listed in the EPS list of conference. Your regional Program Director for Region (1-7&9, 8 or 10) Programs can help you with making contacts with the conference organizers.

Organizing a conference

IEEE provides learning opportunities for conference organizers of all experience levels. IEEE Meetings, Conferences & Events (MCE) provides a Conference Education Program through the IEEE Center for Leadership Excellence. This program is a self-study course that you can take at the time of your choosing and tailored to your desired scope and needs. In addition, MCE provides a guide for planning and organizing a conference.

Chapter Revitalization

Chapter revitalization can be an undertaking of an already active Chapter that wishes to grow its membership and visibility within its region, or it may be a push to save a Chapter. Start by identifying all members in your region. If you want more members and your chapter is not already a joint one, determine if there are other chapters (or membership representation from another society) in the area with which your chapter might join. Possible contacts for assistance at this stage of the revitalization are your EPS Regional Directors or your local IEEE section.

Next, plan an event. As you do this, remember that the primary purpose of your event is to bring the membership together to foster networking and chapter enthusiasm. The revitalization meeting is a great time to bring in an IEEE representative from your local Section or the Society. These individuals will be familiar with chapter support programs, distinguished lecturer programs, and educational support. They can help answer questions about the application process for these programs. During the revitalization meeting, discuss and plan next officer election. This is a critical step in the revitalization process.

Once chapter leadership has been established, it is important to agree on a meeting schedule. Now that you have some interest in your chapter, give the membership a regular, reliable meeting schedule. For example, a bimonthly meeting schedule might be adopted. This step leads to perhaps the most difficult step of all: organizing and planning the future meetings! Planning and organizing chapter meetings is not as daunting a task as it may seem.

Even for smaller chapters, interested members will want to see the chapter succeed and grow. Build on their enthusiasm by enlisting their help with planning future meetings. The ultimate goal of the chapter revitalization process is to bring forth enthusiastic Chapter leaders who are determined to see the Chapter and its support of the membership continue to grow.

- **Chapter Probation:** Failure of a Chapter to meet the minimum required activities for a period of one year shall result in the Chapter automatically being placed on probation, effective 1 January of the following year. A Chapter probation period shall last three consecutive years. The Chapter will not be eligible for possible rebates until it comes into compliance with the minimum requirements.
- **Chapter Dissolution:** With the concurrence of the President of EPS a Chapter may be dissolved. A Chapter shall be dissolved automatically if it has failed to meet the minimum requirements as stated above for three consecutive years and annual notice has been given to all concerned. Following dissolution, any remaining funds and assets in the custody of the Chapter shall revert to the EPS.

- **Chapter Reinstatement:** A Chapter can be reinstated within 60 days following the date of automatic dissolution at the November Board meeting and when the following conditions have been met: the interest to reactivate the Chapter and a volunteer to serve as the Chapter Chair has been secured to the EPS Society President. Any meetings held and reported during the year of reinstatement will apply to that year's activities.

References

- Resources for Chapters and Student Chapters - IEEE Electronics Packaging Society
- https://mga.ieee.org/images/files/MGA_Operations_Manual_2021.1.11_FINAL.pdf
- Meeting Reporting - IEEE Member and Geographic Activities
- https://ta.ieee.org/
- IEEE MGA vTools: https://vtools.ieee.org/training/
-