IEEE EPS Guide to New CHAPTER FORMATION

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.

EPS Guide to New Chapter Formation

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BACKGROUND: The IEEE is a non-profit professional association for electronic engineering 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. 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.

Today IEEE has more than 350,000 members in more than 39 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 narrative presents the many processes that enable the formation of new EPS chapters, both regular and student chapters.

INTRODUCTION: All information, processes described, tools and forms are the current ones that are found on the EPS Chapter Society Resources as of this date. This narrative compiles many of these into one single document that can be used as a guide for any EPS Chapter. Since chapter policies change, processes are updated, new forms introduced, and tools introduced are subject to change or updates. This "easy-guide" should be reviewed biannually to ensure it provides the latest information. To ensure the latest information or more detailed information is required please go to the specific IEEE EPS web pages indicated.

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.

Chapter Formation Options

There are three options that can be chosen when forming an EPS Chapter. They are described below. This section will then be followed with the Chapter Formation process.

1. **New EPS Chapter:** To form an EPS Chapter you will need:

   - 12 EPS Members (above Student Member Grade) to sign the new chapter petition,
   - approval of the petition by the local section executive committee,
   - approval from Member and Geographic Activities Board, which is granted if the EPS President and the Region Director have no objections.

2. **New Joint Chapter (two or more Societies)**: To form a new EPS Joint Chapter (EPS plus one or more other IEEE Societies) you will need:

- 12 Society members to sign the New Chapter petition – no less than three members from each Society,
- approval of the petition by the local Section Executive Committee,
- approval from Member and Geographic Activities Board, which is granted if the Society President(s) and the Region Director have no objections.

3. **New Joint Chapter (two or more contiguous Sections):** To form a new EPS Joint Chapter (EPS plus one or more IEEE Sections) you will need:

- 12 Society members within the Sections involved to sign the New Chapter petition – no less than three members from each Society,
- approval of the petition by the local Section Executive Committees,
- approval from Member and Geographic Activities Board, which is granted if the Society President(s) and the Region Director have no objections.

Requirements: The organizer of a new Chapter must be of Member, Graduate Student Member, Senior Member or Fellow grade. A minimum of 12 higher-grade members (Student, Affiliate or Associate Member votes do not qualify) are required to sign the new Chapter petition. The Chair of a Chapter must be a current IEEE Member (Student, Affiliate and associate Members may not be a Chapter Chair) and a member of the EPS.

Chapter Formation Process

1. Obtain a list of existing EPS members in your IEEE Section from your local EPS Regional Director or the EPS Executive Director.
2. Complete the Chapter Formation Petition online via petition form (preferred) or Complete the Chapter Formation Petition via e-mail.
3. For petitions via email, send an e-mail with the required data (Member name, IEEE Member number, the IEEE Section name, and the proposed IEEE Chapter's name, along with a statement such as "I, as a member of the above Society and Section, hereby petition for approval to form a Chapter in the Section indicated above"). Include the full name of the petitioner (Organizer) and contact address. Record e-mail signatures on the petition form, with a note "E-mail attached" in the Petition Signature Column, along with the signatures that were physically obtained on the petition form. E-mails are accepted as proof of signature on the petition. Submit to local IEEE Section's Executive Committee for approval. Send to IEEE Member and Geographic Activities staff with copy to EPS Executive Office.
4. For online petitions, the
5. Staff will verify signatures.
6. Staff will obtain approvals of EPS President and Region Director.

Student Chapter Formation Process

Student Chapter Petition Process:

1. Ensure there is an existing Student Branch at your University. If not, you need at least 12 IEEE student members to form one, via the same online petition.
2. Ensure that you have at least 6 EPS student members. If not, you need to get 6 IEEE student members to join EPS first via www.eps.ieee.org
3. Get a faculty who is an existing member of IEEE and EPS to agree to act as Advisor. You need to enter some of their personal details including IEEE membership number.
4. Get one of the EPS student members in your university to serve as the Interim Student Branch Chapter Chair and ask them to submit the petition online at IEEE MGA Petition Service.
5. Note that there is no need for you to provide the details of the group of founding EPS student members nor to get their signatures. The online system will automatically send emails to all the EPS student members in your university to request them to endorse the petition. You may only need to inform the student members to expect the email and to endorse it accordingly. The online system will similarly send an email to your university's IEEE Student Branch Counselor to get their approval.

Student Chapter Formation Process:

1. Obtain a list of existing EPS members in the Student Branch. (Contact EPS Executive Office).
2. Complete the Student Branch Chapter Formation Petition online via petition form.
3. Obtain approval of Faculty Advisor (must be member of IEEE and EPS) and Student Branch Executive Committee.
4. Send Petition to IEEE Member and Geographic Activities staff with copy to EPS Executive Office.
5. Staff will verify signatures.
6. Staff will obtain approvals of EPS President, Region Director and Region Student Activities Committee Chair.

Student Chapter Promotion Program

To promote the formation of new EPS student chapters and the revival of current EPS student chapters, which have become inactive, EPS has recently launched the Student Chapter Promotion Program (SCPP). Under the SCPP, six students from any university which has an IEEE student branch who are willing to serve as executive committee (ExCo) members in a new student chapter will be given free IEEE+EPS student memberships. The ExCo must ensure that their student chapter remain viable for the year. This includes the organization of at least two technical activities per calendar year, holding of annual elections and timely submission of required activity and financial reports every year.

Additionally, faculty members who are willing to serve as Advisors to new student chapters will also be given free IEEE+EPS eMemberships where available, otherwise regular memberships will be provided. The Advisor's duties include advising on student chapter activities, endorsing financial statements where necessary, ensuring that annual election of new student ExCo members are held before end

December, and required reports are submitted by the student ExCo in a timely manner every year. This first phase of the SCPP was launched in May 2019 and 6 applications have been approved.

To begin the process for receiving IEEE and EPS membership, you will need to have an IEEE account. To do this, go to www.ieee.org, click on "Create Account" in the upper right-hand corner and create an IEEE Account. Once you create the account, look in the upper right-hand corner, you will see your name with a down arrow next to it, click on that and choose "Manage Address Information", check off the "Work" box and fill that out. Please provide an address and your University information including expected graduation date.

A second phase of the SCPP to facilitate the formation of 10 more new student chapters in 2020/21 was launched in December 2019. Any student or faculty who are interested to form new EPS student chapters in their universities, *whether they are currently IEEE members or not*, can submit applications to the EPS Director of Student Programs, (Dr Andrew Tay by emailing him at andrew_tay@ieee.org) listing the names and email addresses of 6 students from the same university who are committed to serve as ExCo members in the new student chapter, and the name and email address of a faculty who is committed to serve as the chapter Advisor. Please note that there needs to be an IEEE Student Branch existing at a university before any IEEE student chapter can be formed at the university.

Applications for the SCPP should be submitted as soon as possible. All applications will be considered by a committee and not all applications will be awarded. To support the organization of technical activities by student chapters, the student chapter ExCo may apply for subsidies of up to US$1000 per annum from EPS. For new chapters, the subsidy is up to US$1500 in their first year.

ADD a new section on the Student Chapter Continuation Program

Chapter Subsidy

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 can be made prior to an event or at the end of the year for all events at one time. Upon approval, funding will be provided to your official Chapter or Section or Branch bank account*. A separate annual report must also be submitted to IEEE using vTools.

EPS Chapter Activity Report: At the end of each calendar year or at the conclusion of an activity or, activities, which have been subsidized by EPS Chapter or the Student Chapter must submit a report to the EPS Director of Chapter Programs using the format below for *each* activity organised. Where possible, please attach captioned photographs with your report. Activities can be categorized as technical (seminars, workshops, etc), administrative (committee meetings, AGM, etc), social and others.

A minimum of two technical events a year and a consistent membership for the year of 10 members for a regular society or 5 members for a student chapter.

The form used is a "smartsheet" form. It can be found at the link below. Below the link is the required information to complete the smartsheet. After it is completed it will be directed to either the Chapter Program Director or the Student Chapter Director for approval. Once approved the annual subsidy of

$1000 will be provided to the Smartsheet's requestor's Chapter. In addition to the submission of the smartsheet the chapter must submit the same information into the vTools application at the end of the year. IEEE vTools.Events : vTools Events

Chapter Subsidy Request (smartsheet.com)

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

REPORT ON ACTIVITY #1:
Title:
Category:
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?

REPORT ON ACTIVITY #2 or more: Provide the same event unique information for the 2nd, 3rd or more events.

Financial Statement on EPS-Subsidized Activity (US$)

SUBSIDY FROM EPS OR BALANCE THEREOF	$ -

DESCRIPTION OF EXPENSES CHARGED TO EPS SUBSIDY	
1	$ -
2	$ -
3	$ -
4	$ -

TOTAL EXPENSES	$	-

BALANCE	$	-

We certify that the above accounts are true and correct:

Signature of Submitter: _____Date: _____

Name of Submitter: _____ Email: _____

Signature of Chapter Advisor: _____Date: _____

Name of Chapter Advisor: _____ Email: _____

Notes:

1. This statement should be submitted as soon as possible after the event for which financial subsidy from EPS has been provided.

2. Any excess of budget over actual expenditure should be maintained in the chapter's bank account for future use for official chapter activities. It should be considered in future applications for EPS subsidies.

3. This statement should be signed by the Submitter and the Student Chapter Advisor, and an image of it inserted into the EPS Student Chapter Subsidized Activity Report and submitted to the EPS Director of Student Programs.