



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 to 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 number 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, discussing with them the scope and interests of the Chapter, preparing the petition and a business plan that includes mission/goals, and planned meetings and activities for first 6 months.

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 shown below. For alternate types 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 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. See below for step-by-step process.
- 5) A business plan that includes mission/goals, planned meetings and activities for first 6 months.

6) More details can be found here: <https://mga.ieee.org/volunteer-hub/geographic-unit-operations/formations-and-petitions>

CHAPTER/JOINT CHAPTER PETITION GUIDE



Not Submitted

| | | | | | |
|-----------------------------|-----------------------|---------------------|---------------|--------------|------------|
| PETITION INFORMATION | ORGANIZER INFORMATION | CHAPTER INFORMATION | BUSINESS PLAN | ENDORSEMENTS | SIGNATURES |
|-----------------------------|-----------------------|---------------------|---------------|--------------|------------|

Petition Information

A Technical Chapter is the technical subunit of one or more geographic units, and one or more Societies/Technical Councils. **Technical Chapters** are your local link to the valuable resources available from IEEE and its 40+ Societies and Technical Councils. To form a Chapter, please read the requirements below. This petition form also provides the requirements to form a joint chapter of two or more societies; to form a joint chapter of two or more contiguous Sections; or how to change the status of an existing chapter. Any questions should be submitted to petition@ieee.org.

This petition to establish a Technical Chapter shall contain the following:

- Name of the geographic parent.
- Name of the sponsoring technical parent society(ies)/technical council.
- Name of the organizer must be of IEEE Graduate Student Member or of higher-grade status and must be an IEEE member for a minimum of six months. The organizer shall serve as the interim Chair pending election at a later date.
- Signatures of at least 12 IEEE members, in good standing, of Graduate Student Member grade or higher, who are members of the parent society(ies) and geographic unit involved, and are IEEE members for a minimum of six months.
- A business plan that includes mission/goals, planned meetings and activities for first 6 months.
- Endorsement of the geographic parent executive committee. The completed petition shall be endorsed by the geographic parent executive committee.

The Chapter will be considered established after the Regional Director and the Society/Technical Council President(s) have approved the formation of the Chapter. Following approval, the Geographic parent 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 Member and Geographic Activities Board.

TO FORM A JOINT CHAPTER COVERING TWO OR MORE SOCIETIES

The requirements are the same as for a single Society Chapter, except that not less than three of the 12 signatures on the petition shall be voting members of each of the Societies involved.

For example, a joint Power & Energy (PE31) and Industry Applications (IA34) Society Chapter might be formed with eight petitioners belonging to PE31 and four petitioners to IA34. It is not required, but may be useful, that Chapter members or officers maintain membership in both Societies. It is suggested that more than the specified amount of names and signatures be included to ensure that all petitioners qualify, thus speeding the process of the petition.

TO FORM A JOINT CHAPTER OF 2 OR MORE CONTIGUOUS SECTIONS

A petition must be signed by not less than 12 voting members of the Sections involved, who are members of the Society or Societies, and submitted for approval by the pertinent Sections' Executive Committees. In addition to the items required for forming a single Section chapter, the petition must include:

- The names of the Sections involved
- The name(s) of the Society or Societies/Technical Council
- The name of the Chapter Organizer and Co-Organizers
- The organizational unit (administrative parent Section) which shall be responsible for the Chapter's management. (In joint Chapters, administrative matters relate to the parent Section.)

The Joint Chapter shall be considered established after all entities involved have approved to the formation of the Chapter.

Following approval, the Sections and Societies/Technical Council involved, the Chapter organizer and the Regional Director will be notified. The Chapter formation will be noted in the Report of the Managing Director at the next meeting of the MGA Board.

TO CHANGE THE STATUS OF AN EXISTING CHAPTER

The status of an existing Chapter may be changed from single to joint, or vice-versa, or from one joint combination to another, without submission of a petition. The change in status will become effective following approval of the change by the Regional Director, the Society/Technical Council Presidents, and the involved Geographic Parent Executive Committee(s).

- The written request, with full details on the proposed change in Chapter status, shall be submitted by the Geographic Parent Executive Committee. This request should include the name and address of the Organizer of the restructured Chapter who will act as its Chair, and be emailed to petition@ieee.org.
- Action will be taken by MGA staff to obtain approval of the change in status by those concerned.
- When the necessary approvals have been received, the Geographic Parent Chair, the Chapter Organizer, the Regional Director and the Presidents of the Societies/Technical Council concerned will be notified.
- The Chapter formation will be noted in the Report of the Managing Director at the next meeting of the MGA Board.

NEXT >

This is the initial page encountered when initiating a petition. While this page does not contain any actionable items, it is imperative to review it thoroughly as it provides guidelines for the petition and pertinent information regarding the petition you are creating.

Organizer Information

Petition to Form an IEEE Chapter / Joint Chapter 🕒 Not Submitted

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Organizer/Interim Chapter Chair

The following individual is serving as the Organizer of the Chapter, who will serve as interim Chapter Chair pending an election at a later time. Eligible candidates must hold grade of Graduate Student Member, or higher and also be a member of the Society, as well as a member of IEEE for a minimum of six months. An election should be held once the Chapter has received confirmation of official formation by IEEE.

If you are forming a Joint Chapter comprised of two or more contiguous sections, please use the (+ Add Co-Organizer) button to add Co-Organizers by entering their IEEE Member number.

| Member Number | Full Name | Grade | Email |
|---------------|-----------|-------|-------|
| | | | |

Email Incorrect? [Update your User Profile](#)

1 ↑

ADD CO-ORGANIZER

BACK
SAVE & CONTINUE

1- Your information will be pre-loaded onto this page. Please make sure all information on this tab is correct. If the information is not correct, please visit the following link: [Edit Profile](#). To start a Section Chapter/Section Joint Chapter, you must be a Graduate Student Member Grade or higher.

Chapter Information

Petition to Form an IEEE Chapter / Joint Chapter 🕒 Not Submitted

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Chapter Information

Please select the IEEE Society or Technical Council for which you are forming a Chapter.

Name of the Geographic Parent

Name of IEEE Society(ies) (Select all that apply)

- IEEE Broadcast Technology Society
- IEEE Oceanic Engineering Society
- IEEE Communications Society
- IEEE Vehicular Technology Society
- IEEE Reliability Society

Name of IEEE Technical Council(s) (Select all that apply)

- IEEE Sensors Council
- IEEE Council on RFID
- IEEE Systems Council
- IEEE Transportation Electrification Council

1 ← **2** ← →

BACK
SAVE & CONTINUE



- 1- The name of the Geographic Parent is automatically retrieved from your IEEE profile. Kindly ensure the accuracy of this information. Petitioners are required to belong to the Geographic Parent and have an active membership to the Societies/Councils selected.
- 2- Please select the Societies/Councils you wish to start. Should the Section already have an active Chapter for the Societies/Councils you have selected, the petition will be rescinded. If the Society/Council you wish to select is not available, it means you do not hold an active membership to that Society/Council. If you select more than one Society/Council, you will be forming a Joint Chapter.

Business Plan

The screenshot shows a web form titled "Petition to Form an IEEE Chapter / Joint Chapter". At the top right, there is a "Not Submitted" status indicator. Below the title, there are six tabs: "PETITION INFORMATION", "ORGANIZER INFORMATION", "CHAPTER INFORMATION", "BUSINESS PLAN", "ENDORSEMENTS", and "SIGNATURES". The "BUSINESS PLAN" tab is currently selected and underlined. Below the tabs, the heading "Business Plan" is followed by the instruction: "Please provide the following information for the proposed geographic unit." There are four numbered questions, each with a corresponding text input area:
1. What was the motivating factor that led to forming this geographic unit? What member needs will be fulfilled as a result of forming this unit? *
2. List the activities the unit will focus on for the first six months. What activities will engage the members of the unit with one another? *
3. What accomplishments will this unit strive to meet in its first year? *
4. What level of local support is engaged in support of the unit activities? *
A red arrow with the number "1" inside a red circle points to the second question. At the bottom right of the form, there are two buttons: "BACK" (green) and "SAVE & CONTINUE" (orange with a right-pointing arrow).

PLEASE FILL OUT PETITION INFORMATION IN ENGLISH

- 1- Questions should be answered comprehensively. It is advisable to emphasize sustainability, proposed activities, strategies for increasing membership, institutional support, and election plans. Ambiguous or imprecise responses to these inquiries often lead to the petition not being approved.

Petition to Form an IEEE Chapter / Joint Chapter 🕒 Not Submitted

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Endorsement of IEEE Members

Geographic Parent Executive Committee endorsement

An email will automatically go out to the Chair(s) of all Geographic Parent Unit(s), asking for them to endorse your petition*.

**If you do not report to a Section, the endorsement request will go to your Region Director.*

| Member Number * | Full Name | Email | Status |
|-----------------|-----------|-------|--------|
| | | | |

BACK
SAVE & CONTINUE >

- 1- The Endorser for this petition type will automatically preload into this field. There is no action required by you on this tab.**

Signatures

Petition to Form an IEEE Chapter / Joint Chapter 🕒 Not Submitted

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Signatures

Please click the Get Signatures button to populate this page with a list of IEEE Members eligible to sign your petition.

BACK
GET SIGNATURES

- 1- Upon completing the petition form, please select the "Get Signatures" button. There is no need to manually input petitioners' information, as our database will automatically compile and append all eligible petitioners. Should you encounter an error message stating, "We are unable to identify enough qualified petitioners who are eligible to sign this petition. Please contact petition@ieee.org for further assistance," this likely indicates that there are not enough eligible petitioners that are within the Section, that have active memberships to the Societies/Councils that you have selected.**


Petition to Form an IEEE Chapter / Joint Chapter 🕒 Not Submitted

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Signatures

Requested Signatures

0 out of 12 signatures required for this petition have been received.

1


BACK
SUBMIT >

- 1- Once the petition has been populated, your petition is ready to be submitted. When you click the submit button, you should receive a message confirming your submission.

SUMMARY



The Organizer fills out the petition and submits it to IEEE.

IEEE will review the petition for accuracy and to make sure all guidelines and requirements have been met.

Once internally verified, emails will automatically be sent to the endorsers, asking them to view and endorse the petition.

Once the petition is fully endorsed, emails will automatically be sent out to all eligible petitioners inviting them to view and sign the petition.

Once the required signatures have been received, the petition will move to final approval.

The organizer will receive an email notifying them if the petition was successful.



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 engage 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, refer to 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 satisfactory 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 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:

<https://mga.ieee.org/volunteer-hub/geographic-unit-operations/formations-and-petitions#chapter>

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 [Vtools](#). A minimum of two technical meetings per year is required to maintain viability.
- It is recommended that the Chapter set up and maintain an updated website publishing the most relevant information about the Chapter life.
- Chapter Chair must send to the Society a filled-in Chapter Report Form (that can be found on <https://iee-ims.org/activities/about-membership-activities/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. Assistance navigating the IEEE resources is 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 the I&M Society Chapter Chairs Liaison (See Section 6.2) for a list.

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 username 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 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.

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 accommodation. While it may be easier for the Chair to do all 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 volunteers 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 industries 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 volunteers 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.

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 OU analytics Membership database.

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 Web Hosting server (<https://site.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” to provide a simple redirect (such as <http://www.ieee.org/chapters>) you may do so by reviewing the web tools available on the IEEE Web Hosting server site (<https://site.ieee.org/>).

E-Notice Service: Your Section may also utilize the “E-Notice” service, which allows them to send out an electronic notification (recommended not more frequently than monthly) 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 a 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 for 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 a speaker and room to 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 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 several sources of good speakers for a Chapter meeting. You might consider:

- Local industrial leaders speak 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.
- Social media advertising.
- 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 (<https://brand-experience.ieee.org/toolkits/publicity-toolkit/>)

Email addresses for your Chapter membership can be obtained from IEEE OU analytics or by asking 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 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 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 <https://iee-ims.org/activities/about-membership-activities/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 support their future leadership. 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 <https://iee-ims.org/activities/about-membership-activities/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 especially when you have spent time organizing a major event such as a workshop, 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 <https://iee-ims.org/activities/about-membership-activities/chapter-activities> for contact data.

6.3 DISTINGUISHED LECTURER PROGRAM

The I&M Society offers 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 <https://iee-ims.org/activities/about-education-committee-activities/dlp>.

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 have been notified that a conference is taking place, an e-mail can be sent to the Section Chair (copied to the Section Vice Chair, Region Director, Conference Chair and the sponsoring Society).

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 (<https://mga.ieee.org/volunteer-hub/geographic-unit-operations/geographic-units-and-groups/chapters>) 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.

6.7 RESOURCES

In addition to the society resources that can be found on the web page <https://ieee-ims.org/activities/about-membership-activities/chapter-activities>, 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.

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. <https://ta.ieee.org/technical-activities-board>



- 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.
<https://mga.ieee.org/volunteer-hub/geographic-unit-operations/geographic-units-and-groups/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

https://mga.ieee.org/images/files/development/MD_Manual_2021_1.pdf

IEEE Instrumentation and Measurement Society Membership VP contact information: <https://iee-ims.org/activities/about-membership-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:

<https://www.ieee.org/about/volunteers/functional-alias-form>

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 <https://www.ieee.org/communities-connection/volunteering/volunteer-resources>

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.

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's 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. Ensures that all Chapter Officers and Committee Chairs are properly trained for their jobs.
- G. Signs off on financial reports when appropriate and confirms all reporting is accurate and submitted in a timely manner.
- H. Ensures satisfactory performance from the other Chapter Officers and the Chapter Committee Chairs.
- I. Prepares an annual report on 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.