

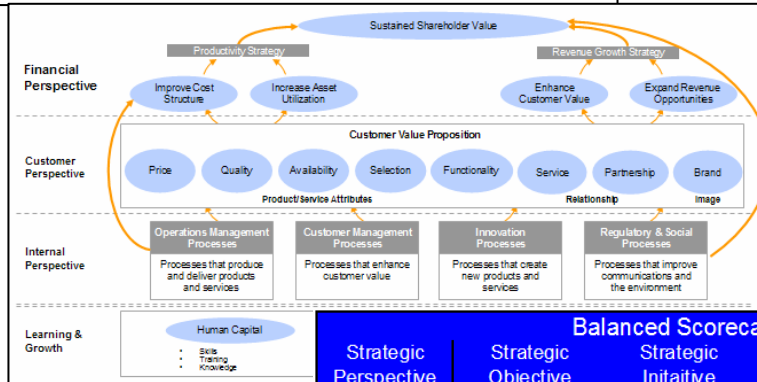
RAB Strategies: Issues and Implications

January 2006

RAB Strategic Approach

Mission, Vision, Core Values & Strategic Goals

Strategy Map



Balanced Scorecard

Strategic Perspective	Strategic Objective	Strategic Initiative	Lead	Metric	Target
Financial	Objective	Initiative	Person	item to count	value
Customer	Objective	Initiative	Person	item/rate	value
Internal	Objective	Initiative	Person	item/rate	value
Learning & Growing	Objective	Objective			

Strategic Actions

Title of the initiative
 Description and scope of the initiative
 Activities to implement the initiative

- Description of the activities
- Schedules, Deliverables, and Budget

Activities, Schedules, and Milestones														
Activity	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Budget	Budget Item
Activity 1													\$ 12,455	
sub activity													\$ 3,636	43
sub activity													\$ 4,849	64
sub activity													\$ 4,000	trvl
Activity 2													\$ 12,652	
sub activity													\$ 9,015	119
sub activity													\$ 3,636	48
													\$ 25,137	

Model adapted from Norton-Kaplan



RAB Progress toward Articulated Strategy

- **Mission, Vision, Core Values**
 - RAB Mission Statement – Update RAB - Feb05/Approved BoD June 2005
 - RAB Vision Statement – Updated RAB February 2005
 - RAB Core Values – Adopted RAB February 2005
 - RAB Strategic Goals – Updated RAB February 2005
- **Strategy Map & Balanced Scorecard**
 - Proposed templates received RAB go ahead February 2005
 - Conversion of existing strategy and measures into template formats is underway
 - Cascading effect between IEEE strategy and RAB strategy, etc. to be discussed at IEEE SPC meeting
 - Re-evaluation of RAB strategy/metrics in context with template formats and IEEE strategy to be discussed at November RAB SPC meeting.
- **Strategic Actions**
 - Re-evaluation of metrics/actions planned based on applying a fully articulated strategy and the results of IEEE Sections Congress 2005.
 - Concept accepted and adaptation of Strategic Action Template to accommodate IEEE/RAB operating principles to be completed for November RAB SPC meeting.

RAB Mission Statement

RAB shall be responsible to the Board Directors and shall serve the needs of the members of the IEEE by maintaining, enhancing, and supporting the geographical organizational units of the IEEE. RAB shall be responsible for IEEE membership, and member development.

- **Membership includes recruitment, development, administration of admissions, retention, elevation, and service, as well as related operational and budget issues.**
- **Member development includes member value development, new member programs and services and support for members' careers, in collaboration with other IEEE Organizational Units.**

RAB Vision Statement

Our vision is to provide the sustained leadership that enables the IEEE to add value to its membership through strengthening its geographical units.

RAB Core Values

1. Satisfy member requirements and needs as the basis of our actions
2. Value diversity
3. Value volunteer and staff contributions
4. Staff and volunteer partnership is key to achieving our goals
5. Honesty, integrity and respect for all interactions with members, volunteers, staff and the general public
6. Achieve results, innovation and excellence through teamwork
7. Geographic organizational units are essential to fulfilling our mission

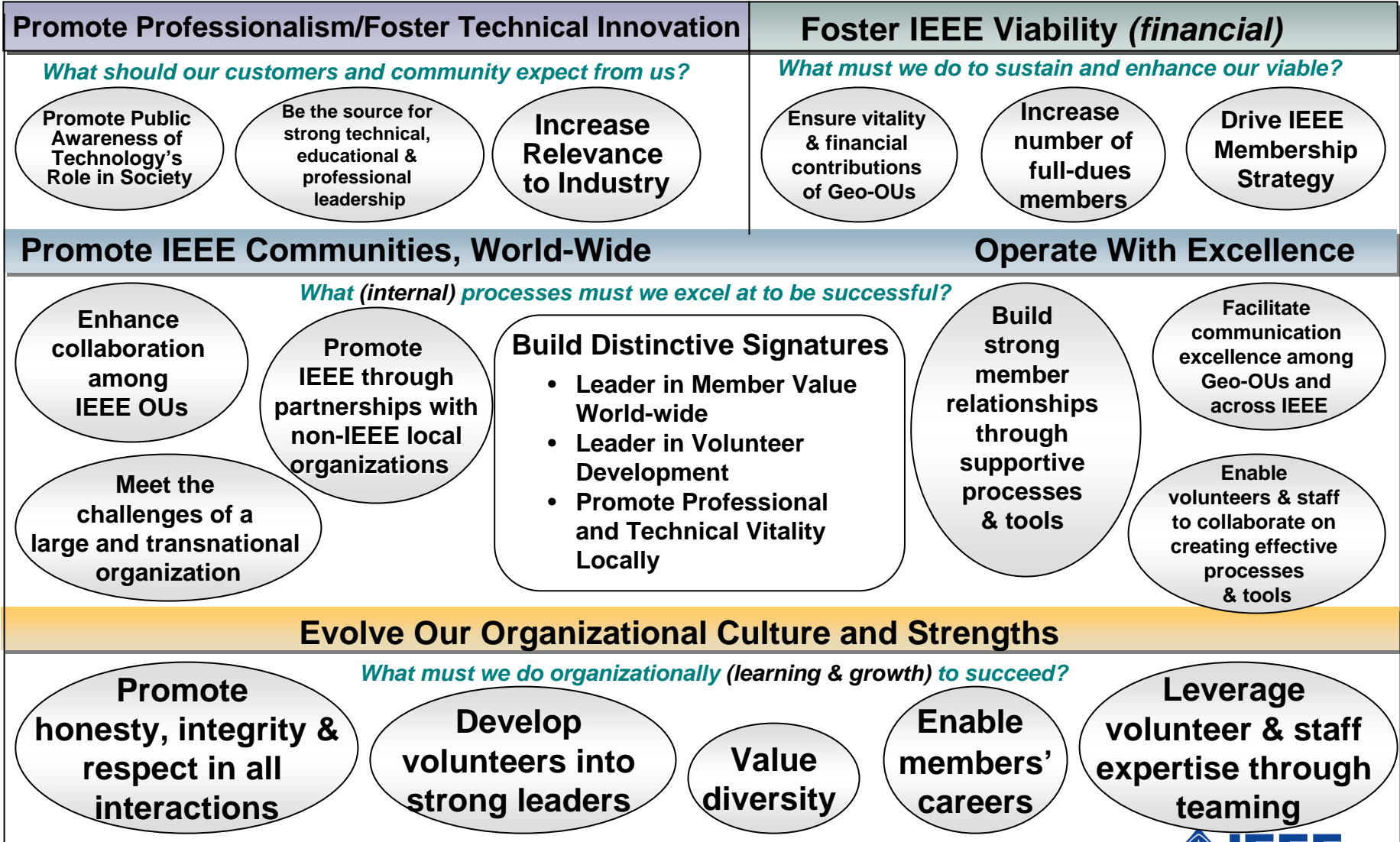
RAB Strategic Goals/Objectives

1. Ensure value to members
2. Be a leader in volunteer development
3. Ensure vitality and contributions of geographic organizational units.
4. Drive IEEE Membership Strategy
5. Meet the challenges of a large and transnational organization
6. Be at the forefront of communications among members, geographical organizational units and IEEE
7. Drive the implementation of the powers reserved concept.

IEEE Regional Activities Strategy Map

Vision

Map - Dec 2005 *Provide the sustained leadership that enables the IEEE to add value to its membership through strengthening its geographical units*



The Value of Volunteering

1. Attracting and retaining good volunteers
2. Enhancing opportunities for volunteers at all levels
3. How should we attract younger volunteers?
4. Volunteer satisfaction
5. Developing volunteers into strong leaders
6. Need to develop short-term volunteer opportunities
7. How can we be the source for strong technical, educational, and professional leadership?
8. Develop volunteer management skills

Member-Volunteer ?

- Most (not all) volunteers are members
- Not enough volunteers within IEEE
- How do we advertise that volunteering within IEEE is a good thing?
- How do you evolve a member to a volunteer?
- What expectations do we have of a member?
- Should there be a tangible subsidy or other incentive given to a volunteer? ie. Frequent member points or member rewards
- Are Sections involving Gold volunteers?

The Value of Volunteering

- Personal Satisfaction
- Skills Development
- Acquire experience in executing a skill
- Benefit to IEEE
- Networking

Personal Satisfaction

- Our “home” – Professional Community
- Our profession
- Our skill set
- Problem solving
- Make a difference in the profession & community
- Feel appreciated and recognized
- My volunteer time was well spent
- My activities provided a good influence for my family and peers

Skills Development

- Leadership Skills
 - Collaborative, facilitative, negotiation, motivation, persuasion
- Managing Peers (people skills)
- Project Management (finances and time)
- Communication (verbal and written)
- Self Management (time, etc)
 - Knowing when to say NO
- Recruiting – continuing process, people skills, networking
- Education, Training and Mentoring
- Managing Operations (resources, finances and time)
- Operating in a complex, multi-dimensional matrix organization

Acquire Experience in Executing a Skill

- Gain Confidence from experience
- Being able to demonstrate a proven track record (deliver)
- Develop the methods to capture “lessons learned”
- Have the opportunity to practice new skills in a friendly environment
 - Need to provide volunteer with a safety net

Benefit to IEEE

- Volunteers provide a human face to IEEE
- Financial Benefit – volunteer driven
- Improving the profession
- Volunteers enable IEEE to achieve its vision and mission
- Networking opportunities promote IEEE to others
- Improves quality, supports diversity and objectivity within the profession

Recommendations

- Communication of concept/plan
 - Develop/collaborate with others to publish on web
 - 3 Minute Recruiting Talk
 - Lecturers, streaming video – personal experience
- Formalize Training/Mentoring Process for volunteer development
 - Courses, Mentoring
 - Plan/Timeline for volunteer training - lifecycle of volunteer
- Evolve products to support – search engine, volunteer duty descriptions, publish/subscribe
 - Volunteer Survey (Metrics)

Increasing the Value of IEEE Membership

1. Cost of IEEE membership
2. Cost to IEEE to have members
3. Products and services
4. Membership satisfaction
5. Targeted share of the market of our traditional disciplines
6. New member market initiatives
7. Increasing relevance to industry
8. Promoting public awareness of technology's role in society
9. How do we enable members' careers?
10. Member Development
11. Membership Development
12. Change of the name of RAB

Membership versus Member Development - definition

- Membership Development – increasing and cultivating membership (recruit new members, retain of existing members, recovery of lost members), while maintaining the qualifications of members. The number of members. Benefits IEEE
- Member Development – increasing a member's skills, grade advancement. Benefits the member.

Strategy

- Retention is best path to growth
- What are needs of the Member Segments – particularly Group 3 (at risk) as the best opportunity
 - Career Tools
 - Continuing Education (technical and soft skills)
 - Networking (but not local meetings)
- Steps to enhancing value
 - Improve online delivery
 - Reconfigure membership benefits to audience
 - Online Meetings – local meetings are low value
 - Free trial programs
 - Online directory will help improve networking (IM features)
 - Mentoring
 - Discounts on Products and Services (Group 1 and 4)
 - Loyalty Program
 - Longevity recognition programs
 - Volunteer recognition programs
 - Relevance to industry/Attract industry management as members

Serve the Needs of the Members

Maintain, Enhance, & Support Geographic Organizational Units



Actions

- Additional Research to better identify or enhance products and services:
 - Better define and understand continuing education, online career resources and networking
 - Research best practices for loyalty programs (activity based and longevity based) and member receptivity to such programs
 - Effectiveness of IEEE Online Communities
- Better communication of existing benefits (e.g., notification when a new issue of Potentials is available online)
- Enable and empower MD Chairs:
 - Encourage personal contact for recruiting new members and retaining existing members.
 - Use of customer relationship management tools for members
 - Produce an MD Toolkit for Section MD Officers

Additional Information/Tools Needed

- Obtain more information on networking (what is it they want). Broken down by demographics
- Same for continuing education
- Cost-Benefit of Online Communities
- Meeting management tools for Sections

RAB's Geographical Units

1. IEEE-country
2. How to handle immerging subsections, chapters, etc. in areas without Sections?
3. Meeting the challenges of a large and transnational organization
4. Facilitating communication excellence among Geo-OU's and across IEEE
5. Review of Geographic Unit Boundaries

Meeting the challenges of a large and transnational organization

- Establish the right protocol to address the following:
- Capture & share the knowledge of local laws within IEEE
 - Countries
 - Laws
 - Legal Standing in local country
 - Currency (Exchange rates)
 - Culture
 - Languages
 - Financial controls
 - Reach back – implications to IEEE Corporate/Volunteers
- Improve staff expertise in international finance & laws
- Coordinate efforts within IEEE & local units

Facilitating communication excellence among Geo-OU's and across IEEE

- Develop a learning organization – capable of retrieving information to reduce inefficiency
 - Education of volunteer/staff of IEEE resources/ procedures
 - ✓ Publish “How to..” for Sections, Chapters, Societies, etc..
 - Publicize the role of geographic units – what can Regional Activities do? Market the role of Regions, Sections, Chapters, Student Branches, etc.
 - Improve communication/cooperation between Sections, Chapters and other units.

Review of Geographic Unit Boundaries

- Investigate the basis for an alternate Regional partitioning.
 - Section boundaries – out dated
 - Create logical groupings
- Constraints
 - Imbalance among the number of HG members within Regions
 - Limited to having 10 Regions (votes on BoD)

RAB Finances (Membership Business)

- The IEEE Board has assigned the Membership Business to RA.
- The long term goal for RAB finances is to sustain and grow the membership business and develop other streams of revenues
- Constraints:
 - Lack of numbers/good forecast
 - Never let membership dues go down
 - Growth in membership only constrained by maintaining prestige and the ability to manage growth
 - BoD approves/controls membership costs, membership tiers
 - 90% Rule regarding the member dues allotment

Current Outlook

- Losing full dues paying members
- Losing high grade members
- Average age of member increasing
- Issue isn't cost, it's value
- Must utilize our local volunteers to grow the membership business
- Other income streams include regional/sectional conferences and selling merchandise—need to build on these and develop new streams of revenues
- What is our minimum infrastructure/ minimum public imperative? Put another way--Trying to please everybody all the time
- Student Membership – a losing proposition
- Do not forget to look at the expense/overhead side
- We do not sunset programs which have little value

Serve the Needs of the Members

Maintain, Enhance, & Support Geographic Organizational Units



How Does RA Define/Create Value for Members?

- Civic Duty
- Provide prestige (different geographically)
- Service to student
- Some local activities
- Soft Skill development, including leadership opportunities
- Mentoring pilot – young professionals

Success

(Key Indicators or Metrics)

- (Larger) number of full dues paying members
- (Decrease) Average age of membership over time, but not too low
- (Increase) Tenure of membership
- (Increase) Average dues per member as a percentage of full dues paying members
- Tracking higher grade/highly active purchasers – cultivate/cross sell
- (Increase) conversion rate from student to member

Strategic Financial Recommendations

- Engineer the IEEE Membership “business”
 - ✓ Grow membership as large as possible subject to the constraints
 - Membership business should generate 10% surplus (90% rule)
 - Prestige of IEEE should be maintained
 - Refine the membership dues equation
 - Mobilize the local volunteer organization in this activity
 - ✓ Develop alternative revenue sources
 - IEEE.tv as a member service and a revenue source – RAB based content as much as possible
 - ✓ Ensure that the RA machinery delivers significant value for its efforts

Short Term/High Value/Positive Financial Items

- Ieee.tv rollout (ST/HV +\$ or -\$)
- General membership job listing – unfulfilled (ST/HV +\$)
- Incentivize local units to help grow the membership business (ST/HV +\$)
- Redefine “local” (societies) (ST/HV +\$)
- Low overhead events (conferences) – local to community it serves – present what they do the community (ST/V +\$)
- Corporate membership (ST/V +\$)
- IEEE vacation package (similar to alumni associations) (ST/V +\$)
- Merchandise/Toys (ST/V +\$)

Long Term/High Value/Positive Financial Items

- Broker certification (LT/V? +\$)
- Develop seminars, workshops and conferences in New technological areas (LT/HV +\$)
- Tracking higher grade/highly active purchasers – cultivate/cross sell (LT/HV +\$)
- IEEE membership card as a discount card for chains (LT/V +\$)

Others – Low Value or -\$

- Do we sunset programs which have little value? (+\$)
- Online membership directory (to some members) (ST/HV -\$)
- Payment options/methods for Dues (ST/V)
- Mentoring pilot – young professionals (ST/V? -\$)
- Managing the academic job market (i.e. Spectrum) (ST/LV +\$)
- Assisting EAB with accreditation (ST/V -\$)
- Traveling Section road show – charge a fee to cover costs (ST/LV)
- Leverage good projects/program from Sections (from the top down) (ST/V)
- Technical conference tied to a membership package – (must have value) (ST & LT/LV)
- Encourage the section to generate activities, give them the tools to do so (ST/V -\$)
- Own/Market membership database (LT/LV +\$)
- Electronic advertisements – take advantage of content management – generate newsletters (ST/LV +\$)
- 2nd ieee email alias for members & other IT products (ST/V)
- One time payment – life membership – member for life (ST/V)
- Junior Membership – High School (ST/V +\$ or -\$)
- Collectible cards (Medal of Honor recipients) – loyalty program (LT/LV +\$)

Introducing Value

- Do we sunset programs which have little value? (+\$)
- Online membership directory (to some members) (ST/HV -\$)
- Payment options/methods for Dues (ST/V)
- Mentoring pilot – young professionals (ST/V? -\$)
- **ieee.tv rollout (ST/HV +\$ or -\$)**
- Joint conferences
- Broker certification (LT/V? +\$)
- Job site/services
 - Managing the academic job market (i.e. Spectrum) (ST/LV +\$)
 - General membership job listing – unfulfilled (ST/HV +\$)

Managing the Membership Business at the Local Level

- Annual Rebate for activities
- Assisting EAB with accreditation (ST/V -\$)
- Traveling Section road show – charge a fee to cover costs (ST/LV)
- Leverage good projects/program from Sections (from the top down) (ST/V)
- Net Return on local programs stays at the local level
- Incentivize local units to help grow the membership business (ST/HV +\$)
- Redefine “local” (societies) (ST/HV +\$)

How to Increase the Conference Business in RA

Current Outlook—

- Tradeshows on a decline
- Some sections/regions have very good programs
- None at the top tier—Keep it that way

Actions:

- Leverage successful programs— Ex) continuing education workshops
- Develop seminars, workshops and conferences in New technological areas (LT/HV +\$)
- Low overhead events (conferences) – local to community it serves – present what they do the community (ST/V +\$)
- Create value in the activities
- Technical conference tied to a membership package – (must have value) (ST & LT/LV)
- Encourage the section to generate activities, give them the tools to do so (ST/V - \$)

Serve the Needs of the Members

Maintain, Enhance, & Support Geographic Organizational Units



Revenue Ideas

- Tracking higher grade/highly active purchasers – cultivate/cross sell (LT/HV +\$)
- Own/Market membership database (LT/LV +\$)
- Electronic advertisements – take advantage of content management – generate newsletters (ST/LV +\$)
- 2nd ieee email alias for members & other IT products (ST/V)
- Corporate membership (ST/V +\$)
- Payment options/methods for Dues
- Joint conferences
- Broker certification
- Job site/services
 - General membership job listing - unfulfilled

Revenue Ideas

Old/New Ideas discussion:

- Corporate membership
- One time payment – life membership – member for life (ST/V)
- Junior Membership – High School (ST/V +\$ or -\$)
- Collectible cards (Medal of Honor recipients) – loyalty program (LT/LV +\$)
- IEEE vacation package (similar to alumni associations) (ST/V +\$)
- IEEE membership card as a discount card for chains (LT/V +\$)
- Merchandise/Toys (ST/V +\$)

Recommendations (not really)

- The ieee.tv rollout will offer new opportunities for growing the business—Apply the resources necessary to make it a success
- Market the membership database (including former members)
- IEEE owns the academic market for job site/services -- Grow this business
- Life Membership – There appears to be some indications that we should look to resolve this issue in the near term (June)
- Incentivize local units to help grow the membership business while growing and leveraging locally developed programs

RAB Finance

1. Outlook over the next 5 to 10 years if RAB operates in same mode
2. Dues structure
3. How do we increase the number of full dues-paying members?
4. RAB OU conferences
5. What can RAB OU's offer to TAB conferences?
6. Other sources of RAB income
7. How do we take advantage of our diversity with Sections throughout the world to improve our finances?
8. IEEE Membership Business
9. Cost Reductions?
10. 90% Rule regarding the member dues allotment
11. RAB Products
12. Provide incentives to local units to increase membership

Constraints on Dues Structure

- BoD approves/controls
- Lack of numbers/good forecast
- What is our minimum infrastructure/ minimum public imperative?
- Trying to please everybody all the time
- Maintain or increase price
- Looking at overhead
- Can we modify dues structure?
- Cost to service a member?
- Is the 50% dues reduction correct?
- Student Membership – we lose money on each membership?
- How do we improve the conversion rate – student to member? – Loyalty benefits – you receive it after X years.
- Life Membership – should we resolve this issue? (June)
- What are the member needs – are they being met?