IEEE Membership Recruitment and Recovery Seminar

3 March 2018

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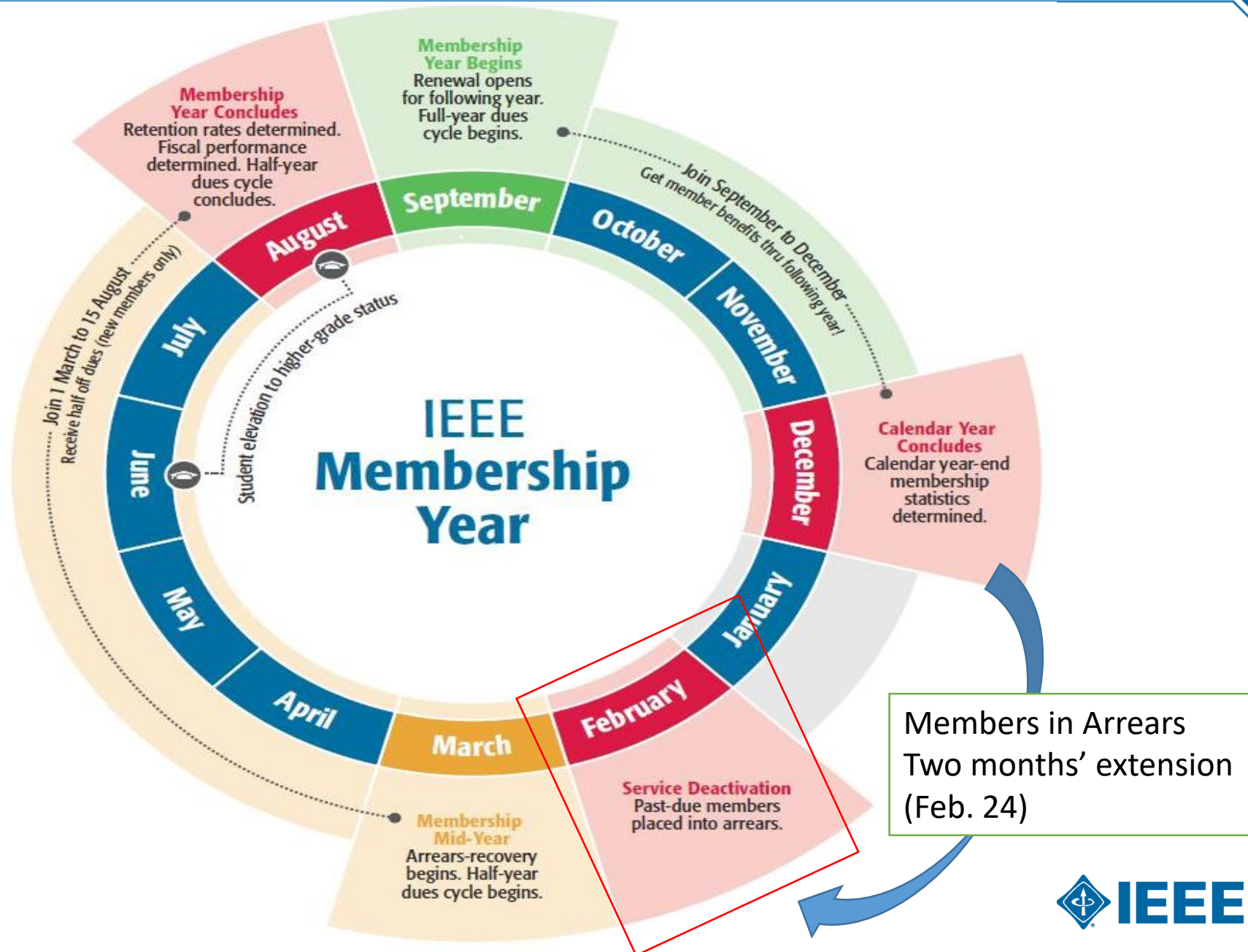# MD Activities

Recruiting new members

Show them the value of joining IEEE. Use conferences, workshops, events. Advertise. Word of mouth.
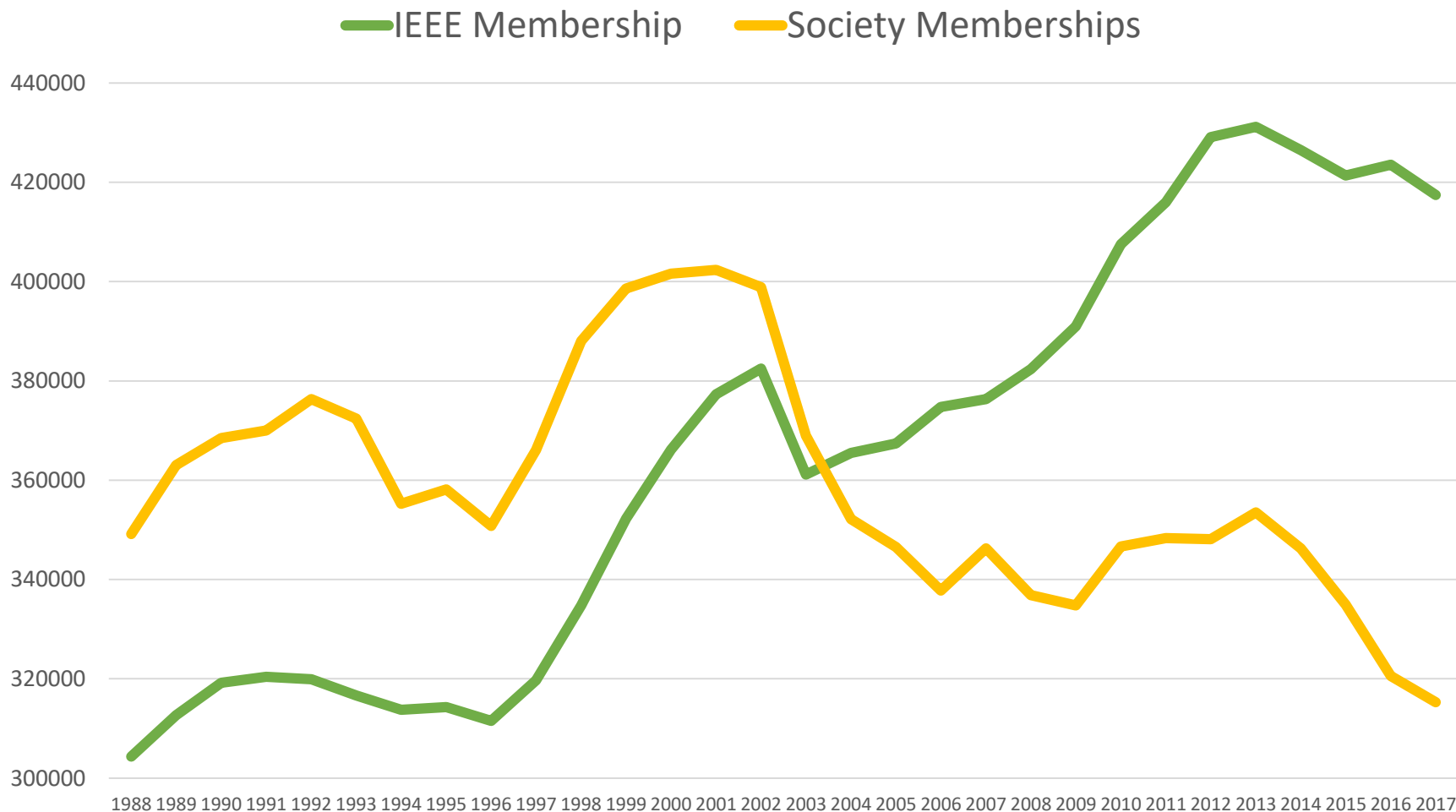
Retaining existing members

Make them feel welcome. Remind them of the value. Promote services that they can try. Pay special attention to first-year members.

Reinstating previous members

Know why they left. Understand the reasons and welcome them back. Remind them of the benefits they are missing.

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IEEE Membership Year

Membership Year Begins — Renewal opens for following year. Full-year dues cycle begins.

September

Membership Year Concludes — Retention rates determined. Fiscal performance determined. Half-year dues cycle concludes.

August

July

June

May

April

Join 1 March to 15 August — Receive half off dues (new members only)

Student elevation to higher-grade status

October

November

Join September to December — Get member benefits thru following year!

December

Calendar Year Concludes — Calendar year-end membership statistics determined.

January

February

March

Service Deactivation — Past-due members placed into arrears.

Membership Mid-Year — Arrears-recovery begins. Half-year dues cycle begins.

Members in Arrears
Two months' extension
(Feb. 24)

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IEEE & Society Membership Trend

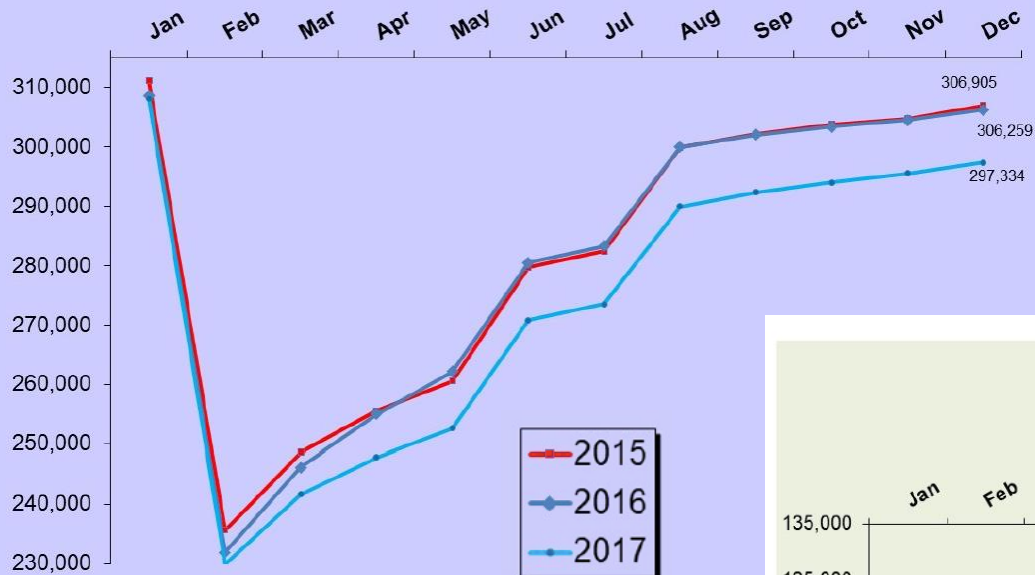Note: Engineering Management Society was excluded from 2008 stats

Total IEEE Membership

TOTAL IEEE MEMBERSHIP
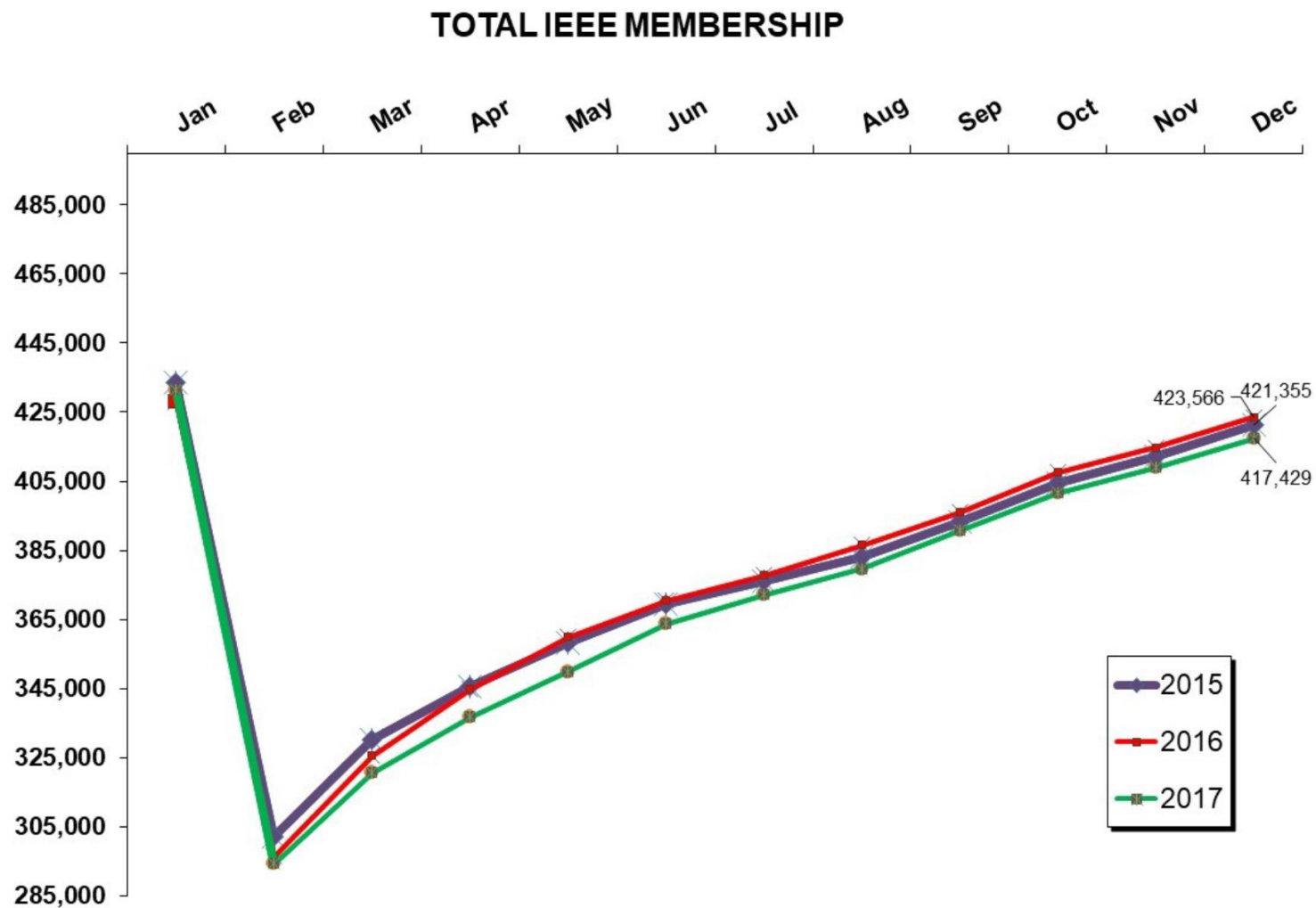
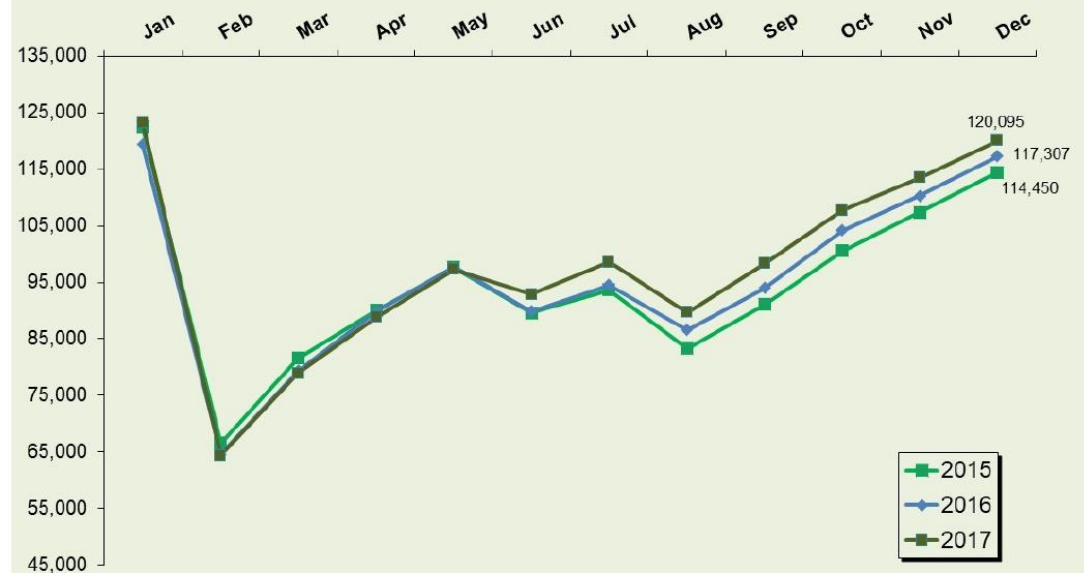# Total Higher Grade / Student Membership

TOTAL HIGHER GRADE MEMBERSHIP
(Not Including Graduate Students)

2015, 2016, 2017
- 306,905
- 306,259
- 297,334

TOTAL STUDENT MEMBERSHIP
(Including Graduate Students)

2015, 2016, 2017
- 120,095
- 117,307
- 114,450

Society Membership

TOTAL SOCIETY MEMBERSHIPS

321,947   320,592

315,296

Legend:
- 2017
- 2016
- 2015

First-Year Member Renewal / Retention

- First Year Member Retention has historically been low around 25-28%

	2014	2015	2016	2017
Overall	70.1%	69.9%	69.3%	68.2%
First Year	28.6%	26.2%	26.9%	26.8%

- We are losing almost 75K First-Year members

As of June, 2014-17

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First-Year Member Renewal / Retention (Cont.)

- <u>First-Year Member Renewal / Retention</u>

Member Renewal / Retention - May 2017

	Higher Grade	**Graduate Students**	**Undergraduate Students**	**Total**
Overall	77.6%	53.5%	25.9%	68.2%
First Year	30.2%	37.0%	19.5%	26.8%

- Need to focus on benefits, engagement and networking
- To satisfy First-Year members is important

Retention by Grade on Years of Service

Retention by Grade on Years of Service
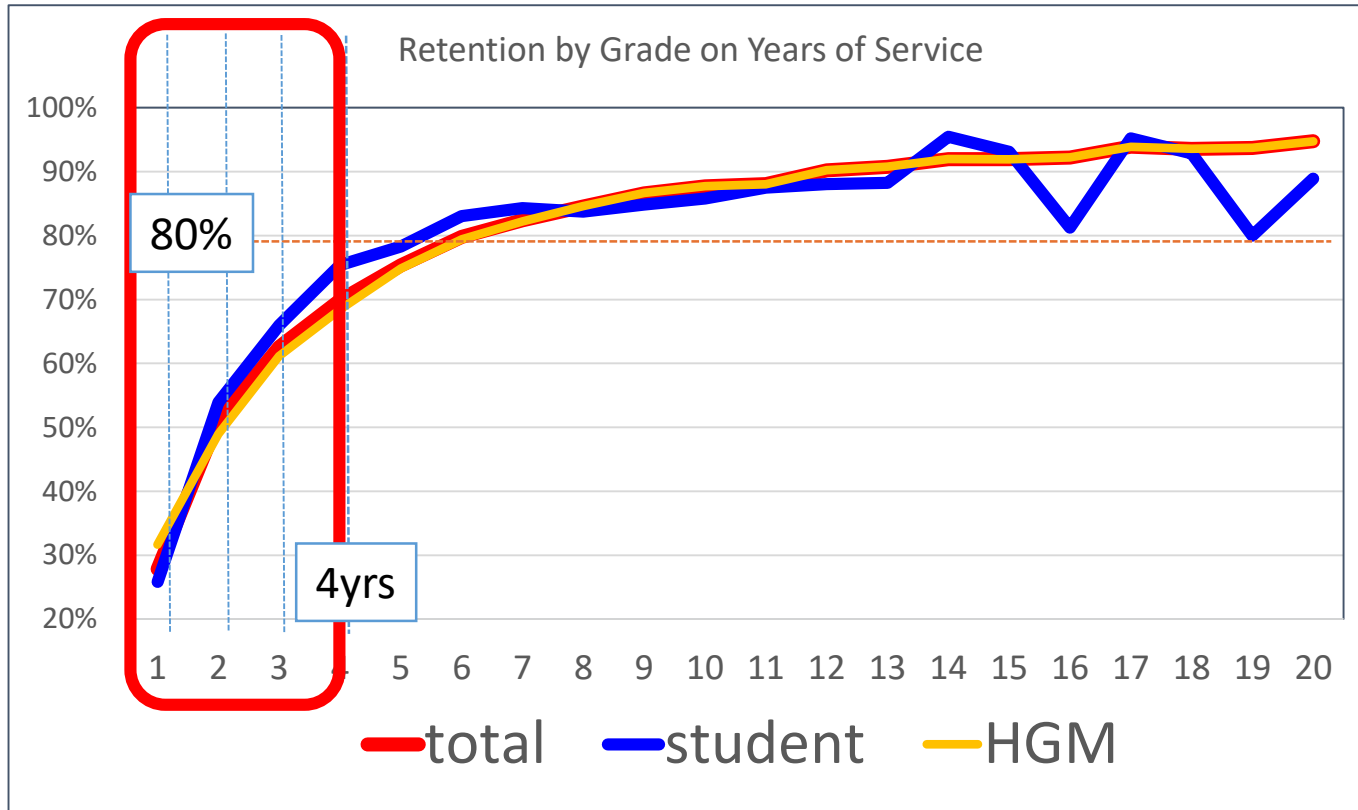
1st year -> about 25%,   2nd year -> about 50%
3rd year -> about 60%,   After 4yrs,
Retention becomes about 70+%

2018 Highlights - Work Across IEEE

1. Communicate with Section/Society MD Officers

2. Encourage to organize MD seminars/workshops in Societies, Regions and Sections

3. Engage Section officers at Regional/Technical activities (e.g. conferences)

4. More involvement of SAC/YP/WIE/LM, Conferences, Standards and IEEE-USA Representative in MD

5. Share best practices in Sections/Societies

MD Community Online
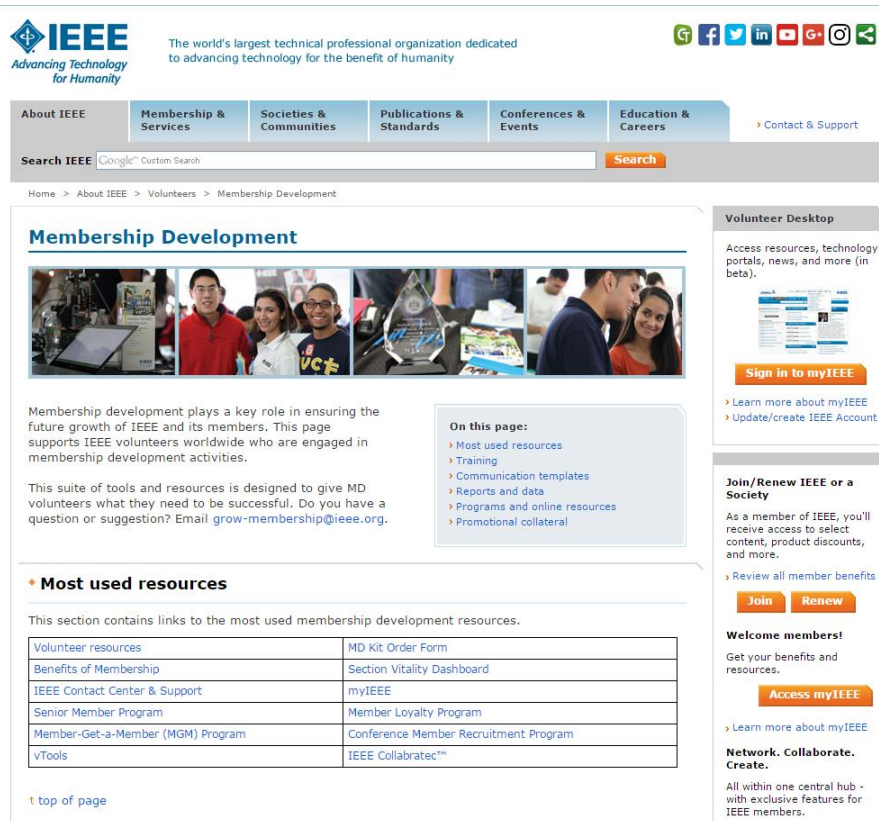
▸ Go to ieee-collabratec.ieee.org

▸ Search Communities for Membership Development Volunteers

▸ Request to join

▸ Remember to turn Notifications to "On"

▸ Post questions, best practices, start discussion!

Membership Development Portal
www.ieee.org/md

- ✓ Training
- ✓ Communication Templates
- ✓ Reports & Data
- ✓ Programs & Online Resources
- ✓ Promotional Collateral (downloadable posters, brochures)

MD Webcasts

▸ Once per month

▸ Present the latest figures on membership

▸ Give hints on the most important activities

▸ Significant feature is highlighted

▸ Webcasts are recorded.
Presentation and audio will be available
on-demand at www.ieee.org/md.

In the February 2018 edition, more than
140 people showed up.

What We Should Concern

▸ Understand your section's situation
  - Membership recruitment, recovery

▸ Take care of your section's members
  - Higher grade, Students
  - First-Year Members
  - Recovery of Arrears

▸ Use MD Data/Tools/Services
  - HQ/Regional MD reports
  - SAMIEEE
  - Section and Society Vitality Dashboard
    ieee.org/vitalitydb
  - MD Supplies
  - MD Webcast
  - etc

Next MD Webcast

23 March 2018

Introducing a tour and tutorial of the new tool, which is Tableau replacing the existing SAMIEE and Section Vitality Dashboard

Questions? Comments? How can we help?
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    +1 732 562 5392
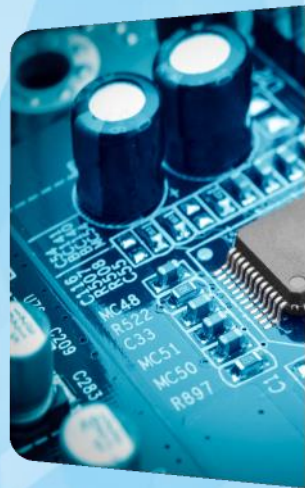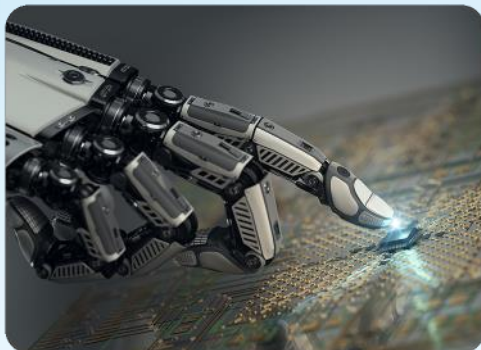
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IEEE GDPR Update

22 February 2018

Priscilla Amalraj, Senior Director IT Digital Center of Excellence

Jonathan Wiggins, Senior Intellectual Property Attorney & Chief Privacy Officer

What is the GDPR?

▸ The General Data Protection Regulation (GDPR)
  - (Regulation EU-2016/679)

▸ Is a regulation by which the European Parliament, the Council of the European Union, and the European Commission intend to strengthen and unify data protection for all EU citizens and individuals within the European Union (EU).

▸ The GDPR's primary aim is to give control back to citizens and residents over their personal data. Because of its extraterritorial aspects, international businesses will be impacted by the regulation.

▸ Goes into effect on May 25, 2018

Who does the GDPR apply to?

▸ The GDPR applies to organizations established in the EU and to organizations, whether or not established in the EU, that process the personal data of EU individuals.

  - IEEE meets these qualifications and is subject to the GDPR.

▸ The GDPR protects the personal data of individuals. Examples of personal data include:

  - Name
  - Photo
  - Email address
  - IP Address

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What are Some of the Key Changes?

▸ **Right to be Forgotten**: Individuals may require data controller to erase their personal information from databases.

▸ **Right to Access/Data Portability**: If asked, Data Controller must provide a copy of personal data in a commonly used and machine readable electronic format.

▸ **Breach Notification**: Organizations are now required to report data breaches to regulatory authorities within 72 hours of first becoming aware of the breach.

▸ **Privacy and Data Considerations**: Organizations must design systems with privacy in mind from the outset ("Privacy by Design").

- Organizations also should only process the data necessary for the completion of their duties, as well as limit access to only those needing this information.

▸ **Consent**: The use of personal data now requires "freely given, specific, informed, and unambiguous" consent from individuals.

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What Does Consent Mean?

▸ Consent must be opt-in, implied consent/opt-out is no longer viable.

▸ Consent to use personal data must be "freely given, specific, informed, and unambiguous."

▸ Organizations must request consent in an intelligible and easily accessible form; legalese terms and conditions will not be acceptable.

▸ If personal data will be shared with third parties this must be disclosed to gain effective consent.

▸ Consent must be as easy to withdraw as it is to give.

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Why is Compliance Important?

▸ Some aspects of the regulation are still being refined, but what's clear now is that the fines for non-compliance are substantial.

▸ Organizations can be fined up to **4% of annual global turnover for breaching the GDPR or €20 Million,** whichever is higher. This is the maximum fine that can be imposed for the most serious infringements e.g., deliberate violations, not having sufficient customer consent to process data, or violating the core of Privacy by Design concepts.

▸ Regulatory agencies may also be permitted to enforce other penalties such as deletion of personal data and placing limitations on interactions with citizens of EU member states.

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What is IEEE Doing?

‣ IEEE has been carefully reviewing its policies and business processes that involve personal data

‣ A cross-organizational task force is working to ensure uniformity in how volunteers, members, and professional staff worldwide collect and use personal data.

‣ Developing a global communications plan that will use newsletters, emails, ieee.org, etc. to keep you apprised of any changes in policies and processes as well as the new resources and tools you will have access to

‣ Updating compliance training courses

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What is IEEE Doing? (continued)

▸ Existing service agreements will be evaluated to ensure inclusion of GDPR-related terms and conditions

▸ Key business platforms and applications such as conference registration systems, websites, peer review tools, marketing and customer management systems are being evaluated

▸ Developing an understanding of future implications for business going forward

▸ Moving towards centralized applications and services

▸ Improving consent and opt-out capabilities and record keeping

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Addressing the Following Key MGA Areas:

▸ The online web application for Join and Renew
- Includes Member Profile

▸ Collabratec
- Includes New Member Directory

▸ SAMIEEE (Sunset May 2018)

▸ IEEE OU Analytics
- Reduce Automatic access from 12K to 1200

▸ vTools Applications – specifically vTools Events and eNotice
- Collecting consent in Events
- Adding functionality to eNotice

▸ Senior Member Elevation, Online Fellows Nomination Process, 3000+ websites on EWH.

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What Does This Mean to You?

For our IEEE Volunteers:

▸ We value your contributions and care about making sure you are able to perform your role in a compliant manner.

▸ Current processes of collecting personal data and emailing on behalf of IEEE will change. This may include deletion of data currently in your possession.

▸ We will provide you with new tools and/or processes for compliance.

▸ We will communicate with you regarding training and education shortly. We respect your time and will try to make these communications as efficient and informative as possible.

What Does This Mean to You

– as an IEEE Volunteer? (continued)

Other areas that will be addressed:

▸ IEEE systems and applications

▸ Non-IEEE systems and applications

▸ Home grown tools and commercial tools for communication
- Constant Contact, Mail Chimp

▸ Places where data resides such as Access databases, Excel spreadsheets, Google Drive, etc.

ORACLE
SIEBEL
Marketo
SurveyMonkey

OPT IN
OPT OUT

XLS
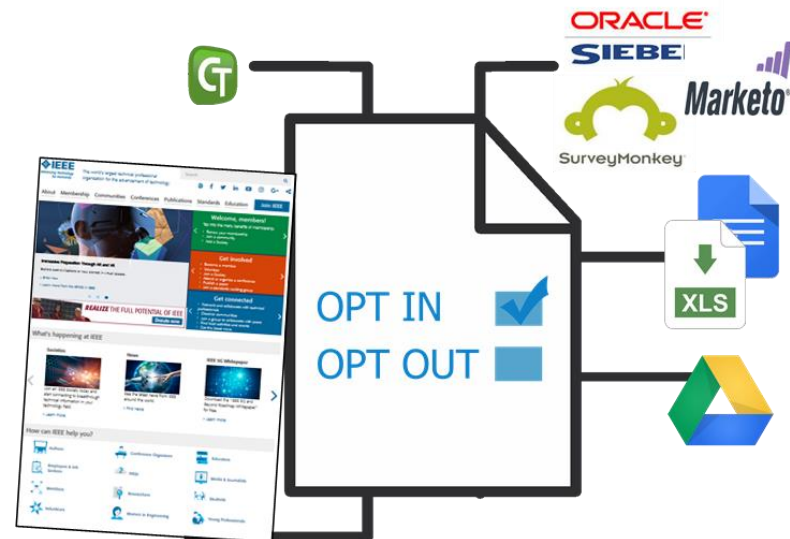
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What Does It Mean to You?

For our IEEE Members we respect your privacy:

▸ IEEE's goal is to balance our legal obligations under the GDPR with our desire to continue to provide our members with IEEE updates, information on new products and services, and opportunities.

▸ You will be asked to update your communication preferences and to provide consent that will allow IEEE to continue to communicate with you.

▸ The steps needed to ensure total compliance are still being developed. Additional information will be made available to you through current communications vehicles such as ieee.org

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GDPR Timeline

<=========Staff & Volunteer Training=========>

FEB'17: Project Start

OCT'17: Vendors Selected

FEB'18: Board Meeting Updates

APR'18: Dev & Testing Complete

POST MAY'18 Continuous Risk Assessment & Privacy Management

JUN'17: Initiation & Scoping

NOV'17: Kickoff

Feb' Communication

MAR'18: Compliance Training

MAY'18 Go Live w/ IEEE changes
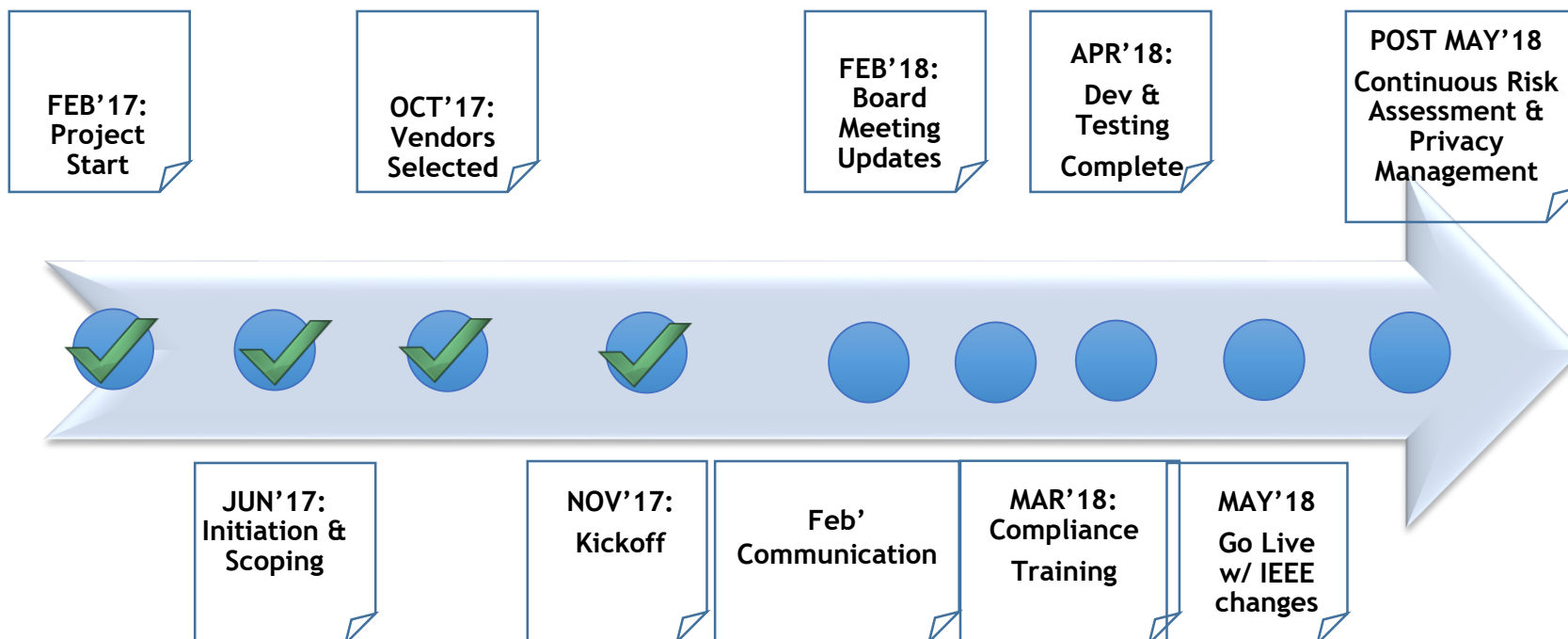
<========= Ongoing Communications =============>

Moving Us Ahead to Reach Compliance

▸ MGA staff are fully involved and committed
- Cecelia Jankowski
- Vera Sharoff (GDPR taskforce)
- Eugene Khusid (GDPR taskforce)
  - Khanh Luu
  - Marguerite Gargiula
  - Elyn Perez and the membership team

▸ Working with the MGA Information Technology and Oversight Committee and the vTools Committee
- Global representation from Italy, Spain, Canada, Sri Lanka, Mexico, India and the US

▸ Working with IEEE Legal and Marketing, to develop and deliver a coordinated, detailed communications plan to ensure all IEEE and MGA-stakeholders are informed, aware, and understand how to meet and maintain GDPR compliance

Our Request to You

▸ Be engaged—this impacts all of MGA including all partners that we work with

▸ Ask questions

▸ Be alert for communications about GDPR

▸ Be prepared to communicate and take action within your Region

▸ Help us identify potential vulnerabilities

▸ Be patient
  - Best practices for handling private data, consent and compliance language, internal operational changes etc, for an association with our global reach, do not exist. They being developed and the target is quickly approaching.

25 May 2018

http://www.gdprcountdownclock.com/

Thank you

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Glossary

- Arrears – members who have not paid the current year dues, services will end
- Inactive – members who have not paid dues from the past year and receive no services
- Deactivation – All IEEE members who have not paid dues for the current membership year by the deactivation service date in February have their member status changed to Arrears
- MD – Membership Development
- MGA – Member & Geographic Activities
- TA – Technical Activities
- MRRC – Membership Recruitment & Recovery Committee
- MGM – Member-Get-A-Member program
- A&A – Admission & Advancement program
- SM – Senior Member grade
- Young Professionals (YP) – formerly IEEE GOLD
- HG – Higher-grade member (Member, Senior Member, Fellow, Life Member)
- RSR – Region Student Representative
- RSAC – Region Student Activities Chair
- SAMIEEE – Section/Society Access to Membership Information

Glossary (Cont'd.)

- ▸ (GEO) – Geographic Predefined Queries Folder, (MD) – Membership Development Predefined Queries Folder, (SOC) – Society Predefined Queries Folder
- ▸ OU – Organization Unit within IEEE (region, section, affinity group, student branch, etc.)
- ▸ OBIEE – Oracle Business Intelligence Enterprise Edition
- ▸ SCOOP – Newsletter from MGA
- ▸ MMD – Member Market Development
- ▸ ACK Pac– Acknowledgement Package sent to new members
- ▸ ExCom – IEEE unit's Executive Committee composed of officers
- ▸ YOY – Year over Year – usually for comparing yearly statistics
- ▸ YOS – Years of Service – for number of membership years
- ▸ MLP – Member Loyalty Program