

Young Professionals Business Plan

Progress Report

16 June 2017

This document serves as an interim report of progress for the Young Professionals Business Plan projects for 2017-2019, in fulfillment of the pledge made to the Board during the IEEE Meeting Series in November 2016. The full description and details of the Young Professionals Business Plan can be found in the extended document.

The report details, in order, the progress achieved as of 16th June 2017, on the following five projects that make up the Business Plan:

1. IEEE Xplore access for Young Professionals
2. Micro-Volunteering (μ Volunteering)
3. Loyalty Program
4. Increasing presence at large-scale events (Signature Events and meetups)
5. Seed funding

Each of the projects included in the Business Plan were funded for research, pilots and data collection in 2017 under the purview of the Task Force assigned. The goal is to develop each project with their own unique measures of success, including data on behaviors, usage, satisfaction and prudent means of execution so that they may ultimately move from a project state into operationalized programs for engaging and retaining Young Professionals throughout IEEE.

This document will be made available to all stakeholders, who will be able to access it online at any time, with regular updates. The milestones, checkpoints, success metrics and deliverables mentioned in this report are only the ones related to 2017 Q1 and Q2, or directly concerning tasks that were scheduled to be performed at this time. For the full list of milestones and checkpoints, and success metrics and deliverables, please refer to the main Young Professionals Business Plan document.

IEEE Xplore access for Young Professionals

Implementation schedule overview

2017 - Q1	2017 - Q2	2017 - Q3	2017 - Q4
<ul style="list-style-type: none"> ✓ <i>Define requirements</i> ✓ <i>Research</i> 	<ul style="list-style-type: none"> ● <i>Cost evaluation</i> ● Corporate implications 	<ul style="list-style-type: none"> ● Implementation: perform beta testing of “rental” platform in collaboration with IEEE Xplore team ● Marketing and promotion via outreach channels. 	<ul style="list-style-type: none"> ● Small scale launch ● Evaluate the usage patterns once the allocated funds are exhausted

Current status overview

The Task Force is investigating new delivery models for content in the IEEE Xplore Digital Library to Higher Grade YP Members (excluding Graduate Student Members and Opt-in YP Members). The two new delivery models include: discounted article rental access (short-term view only) and subsidized single-article downloads.

The Task Force, supported by MGA is coordinating this effort with the IEEE Marketing and Sales team under CMO Karen Hawkins. The rental access platform is currently under development, and will be piloted with YP members once it becomes available, tentatively in early 2018. For 2017, the YP team is focusing on offering single-article downloads at a reduced price to Higher Grade YP Members, by subsidizing a portion of each single-article download cost up to a maximum of \$50,000 with a limited number of subsidized articles per user.

The Task Force leads evaluated the latest IEEE Xplore usage and member segmentation data for the past 3 years, and developed the following subsidy price point for a \$13 single article download: YP member pays \$3, YP committee/business plan pays the remaining \$10 in subsidy. The YP team also launched an additional survey to volunteers and members in June 2017 to further clarify the new delivery model requirements. Results of the survey will be available in July 2017, at which point, the YP team will meet again with the IEEE Marketing & Sales team to discuss the implementation plan for the remainder of 2017.

- Evaluated optimal price point for single-article subsidy;
- Discussed “rental” platform opportunities with IEEE Xplore team, and pilot roll-out to IEEE Young Professional members;
- Preparing pilot launch of subsidized single-article access for Q3 and Q4 of 2017.

Milestones and Checkpoints

Month	Checkpoint/milestone reached	Description
February	<ul style="list-style-type: none"> Cost analysis report 	<ul style="list-style-type: none"> The report was produced in mid-March and was used as part of the Task Force meeting when discussing the possible implementation strategies, especially with regards to financial implications and resulting benefits for the Xplore access project.
April	<ul style="list-style-type: none"> Various access projections report 	<ul style="list-style-type: none"> The report was produced on 27th May and shared as part of an internal meeting that discussed updates on the Business Plan.
Each month	<ul style="list-style-type: none"> Communication and status 	<ul style="list-style-type: none"> Continuous communications and regular updates between the IEEE YP ExCom, IEEE Xplore team and Marketing and Sales.

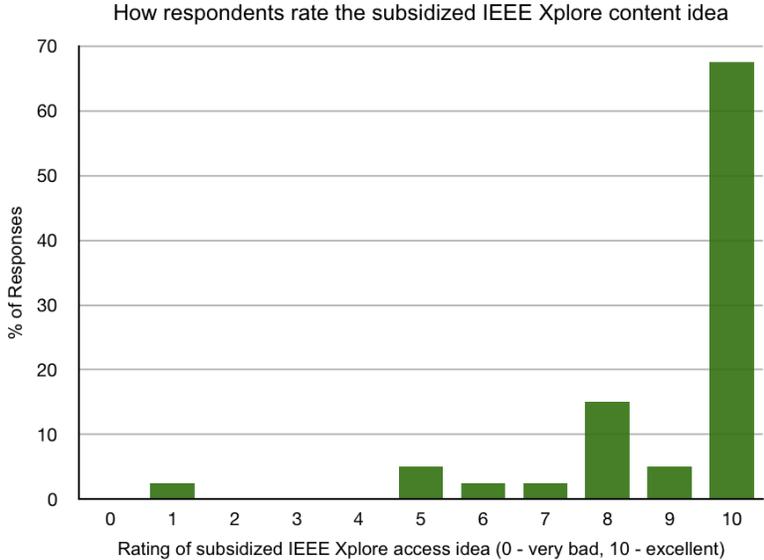
Success metrics and deliverables progress and achievements

Success Metric	Description and schedule
Implementation progress	<ul style="list-style-type: none"> A cost analysis report was created in mid-March and used during the first face-to-face Task Force meeting, as a guide for possible implementation and investment strategies. Various access projection reports Small scale pilot demonstration
Analyze user behavior	<ul style="list-style-type: none"> An initial survey was created to measure the interest of the Young Professionals membership base regarding such a program. The initial survey results are shared in the "Survey results" section below.

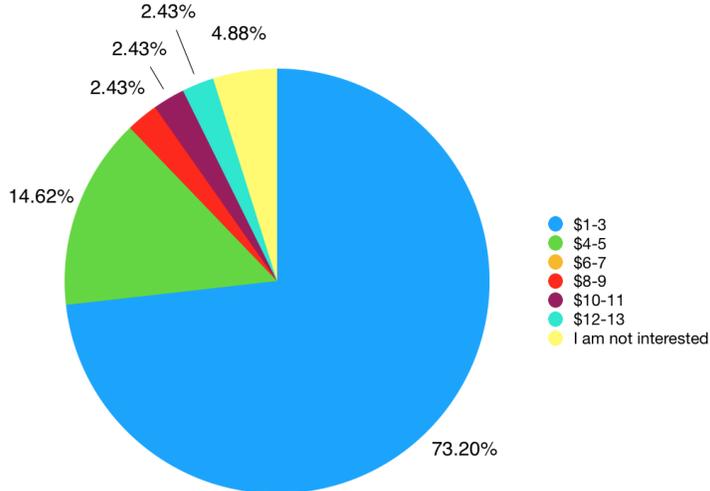
Survey results - initial round

In order to better understand what Young Professionals would like to benefit from in terms of discounted Xplore content, a survey was created and distributed to members on 9th June, consisting of three questions. A summary of the current results is presented below:

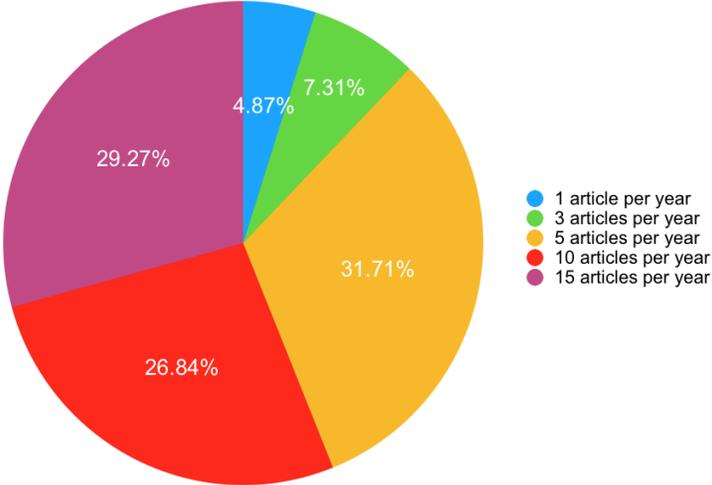
Question 1: What is your opinion regarding the initiative of providing some subsidized access to IEEE Xplore content for IEEE Young Professionals?



Question 2: Since we are not able to fully subsidize access to IEEE Xplore content, what would you consider a fair value for an IEEE article to be?



Question 3: How many articles within a year would you like to access at a subsidized price?



Based on the initial survey results and various costs and benefits projections that were calculated in previous reports, the following model for the subsidized Xplore access is under consideration:

- Current number of Young Professionals users of the IEEE Xplore paid access: 1970
- Usage increase projected: 100% (3940)
- Member price per article: \$3
- Young Professionals subsidy costs per article: \$10
- Amount of articles in the package: 5
- Percentage of served Young Professionals members: 3.28%
- Projected membership dues ($\$160 \times 3940$): \$640k
- Total project costs: \$197k

Challenges faced currently

- Evaluating which articles should have “view only” access through the new “rental” model.
- Selecting the optimal price point per subsidized article, and the total number of articles to subsidize. Alternatively: number of subsidized articles per member.

Financial Status

2017 Approved	50K
YTD Expenditure 2017	0K
FYE 2017 Forecasted	25K (small scale pilot)

Micro-volunteering (μ Volunteering)

Implementation schedule overview

2017 - Q1	2017 - Q2	2017 - Q3	2017 - Q4
<i>✓ Define requirements and specifications</i>	<i>✓ Evaluate platforms and vendors (internal and external)</i>	<ul style="list-style-type: none"> • Vendor selection • Development 	<ul style="list-style-type: none"> • Small scale piloting demo • Demo to IEEE Board • Definition of Volunteering CV (vCV) concept

Current status overview

The μ Volunteering platform has been in development since late January, and it currently has all its fundamental aspects, specifications, and requirement set. The vendor evaluation process started in late March, and is currently ongoing, with the support of MGA IT Staff. While the progress is slightly slower than originally expected (by approximately 2 weeks), the Task Force has decided to take a more cautious approach to vendor selection, and weigh the investment carefully before making a final decision, in order to ensure the best possible outcome.

Milestones and Checkpoints

Month	Checkpoint/milestone reached	Description
February	<ul style="list-style-type: none"> • Finalize project outline and goals 	<ul style="list-style-type: none"> • The project outline and goals were finalized on 18th March, after comments and feedback from the IEEE Young Professionals ExCom. The initial document has served as a basis for future development of the μVolunteering program, and was used as the starting point for the discussion on this topic of the first Task Force meeting in March.
March	<ul style="list-style-type: none"> • Set high-level features of the project • Define, document and deliver requirements 	<ul style="list-style-type: none"> • During the first Task Force meeting, the high-level features and requirements were set, along with a more detailed project outline and specifications. The high-level

	<ul style="list-style-type: none"> ● Perform member journey mapping exercises 	<p>requirements can be found in the “Success metrics and deliverables status” section below.</p> <ul style="list-style-type: none"> ● During the Task Force meeting, the team performed a journey mapping exercise in order to better understand how the µVolunteering program and platform should work, and how it could best serve IEEE members and volunteers. ● During the Task Force meeting, we benefited from the support of MGA IT staff, who helped with technical aspects of implementation.
May	<ul style="list-style-type: none"> ● Determine short list of 3rd party tools ● Demo shortlisted 3rd party tools and assess capabilities to requirements ● Enterprise Architecture review ● Estimate 3rd Party Costs to Implement ● Complete CT integration estimates for 2018 ● Prepare cost/benefit analysis 	<ul style="list-style-type: none"> ● A short list with 5 vendors was put together by IT staff: <ul style="list-style-type: none"> ○ Galaxy Digital ○ VolunteerMatch ○ Volunteer Kinetic ○ Volunteer Hub ○ HandsOnConnect ● The Task Force had calls and demos with Galaxy Digital and VolunteerMatch in early June. ● Collabratec was ruled out by our IT partners for the pilot
June	<ul style="list-style-type: none"> ● Solution Decision/Vendor Selection ● Present Business Case at June Board Meeting 	<ul style="list-style-type: none"> ● Currently in progress
Each month	<ul style="list-style-type: none"> ● Continuous improvement and assessment ● Regular progress reports at internal meetings 	<ul style="list-style-type: none"> ● Close collaboration with Staff for support in developing the project in the most suitable way; ● 2 internal update meetings were held as of 15th June where reports on the project status were given.

Success metrics and deliverables progress and achievements

Success Metric	Description and schedule
Implementation and development progress	<ul style="list-style-type: none"> • Deliver quarterly reports of the implementation progress • Vendors offers and selection report • Several new success factors have been defined for the rest of 2017: <ul style="list-style-type: none"> • Vendor relationship established with phased in plan for integration • Pilot project launch, usage, feedback in beta, satisfaction scores • Defined VCV and member feedback on its usefulness

High-level specification and requirements

The table below gives an overview of the high-level specifications that were identified for the μ Volunteering platform, divided by type and importance. The 5 different types of features relate to initialization (initial contact with the platform), creator experience, user experience, overall platform features, and administrator features. In order to clarify the terminology used, a creator is defined as a platform user who creates and shares volunteering opportunities, a user is defined as someone who responds to opportunities and performs volunteering, and an administrator is a platform manager with higher control over the platform as a whole.

Initialisation	Creator Experience	User Experience	Platform	Administrator
Pilot Product Key Features				
IEEE Login	Opportunity Status (Draft, Open, Close)	Application of the opportunity	Two way Feedback (Creator - User)	Reporting
Ability to pull basic data (Name, Member #, Section) from IEEE database	Emailing Preference		Opportunity alert to creator and user	Statistics Automated
Profile Management	Platform UX Feedback		Basic Templates for opportunities, feedback, communications, etc	

Home Landing Page (Promo Page)	User selection/admission (Rejection and Acceptance workflow)		Emailing Feature (Email notifications)	
Different view for public and IEEE member (Cannot apply, comment)			Activity automatically added to vCV database upon completion	
Basic user profile questions upon first login (Biography, Past Experience in volunteering, Additional Information, Time/Week - Manual)			Bi-directional API	
Ability to create opportunities			Feedback Reminder upon login	
Ability to search posts on platform			IEEE custom branding on the platform	
Final Product Key Features				
Ability to pull complete IEEE profile data to μVolunteering platform	Social Integration for creator	Social integration for user	Advanced templates for # 7 in Must-Have	Extended Platform reporting capabilities for admin
	Volunteer search (Search for people for opportunities by creator)		Messaging Platform	
	Submit testimonials about volunteer experience	Submit testimonials about volunteer experience	Automated updates of vCV	
	Completed opportunity history on profile.		Fraud alert (Ask feedback from both users and creators)	

		Save (opportunities) for Later option (Wishlist)	Block, Spam, Inappropriate, Report User, Flag a post	Block, Spam, Inappropriate, Report User, Flag a post
			Multiple tasks for one event	
Mobile App presence (Android, iOS)				
Mobile Web presence (Responsive Design)				
Optional Product Key Features				
		Personalised testimonials of similar profiles		Moderation workflow for opportunity posting
	Have learning Opportunities	Have learning Opportunities		
	Make suggestions of users to creators based on job requirements and the users' interests.	Make suggestions of opportunities to users based on their interests and past activity		

Challenges faced currently

- Vendor selection: there are several issues regarding the selection of a vendor, including, but not limited to, availability of desired features and platform requirements, difficulty of integrating with existing IEEE systems, data ownership and platform management. The Task Force needs to decide on what compromises it is willing to make.

Financial Status

2017 Approved	25K
YTD Expenditure 2017	0K
FYE 2017 Forecasted	25K (vendor agreement/pilot with SSO integration)

Loyalty Program

Implementation schedule overview

2017 - Q1	2017 - Q2	2017 - Q3	2017 - Q4
<ul style="list-style-type: none"> • <i>Scope and consider requirements and intersection with μVolunteering</i> 	<ul style="list-style-type: none"> ✓ <i>Preliminary journey mapping and committee engagement</i> 	<ul style="list-style-type: none"> • Identify and retain SME/Consultant(s) and document deliverables via Service Agreement 	<ul style="list-style-type: none"> • Deliver on market research/competitive analysis and feasibility study specific to IEEE

Current status overview

The Task Force met in early April after several planning sessions and performed a journey mapping exercise to better understand the customer experience associated with the development and build out of an IEEE loyalty rewards program. The team used five personas in their journey mapping, the “newby, altruist, researcher, career developer and gamer.” The journey mapping exercise was designed as a precursor to determining potential features, platform requirements, rewards schemes and fulfillment/distribution mechanisms. The Task Force has limited resources and research needs that will require consulting time. Gartner’s Marketing Leaders program was considered and rejected due to expense. Two consultants are envisioned:

- a subject matter expert on loyalty and rewards programs
- an IEEE subject matter expert on the organizational structure and systems

Consulting objectives are being developed and documented, meanwhile here are some overarching questions:

1. How do we conduct and deliver a feasibility study to frame up a loyalty program for IEEE?
2. How do we better engage, acquire and retain the volunteer Young Professional community?
3. How do we monitor volunteer behavior and understand the important measurement metrics for growth in memberships and new partnerships?
4. How do we understand what metrics are most important and improve them as they relate to volunteer loyalty and satisfaction?
5. What volunteer behaviors, activities, buying patterns can we track and leverage to predict their future needs and help us improve offerings, experience and loyalty?
6. What mix of technologies will help us accomplish these goals at the lowest investment threshold?

Milestones and Checkpoints

Month	Checkpoint/milestone reached	Description
January	<ul style="list-style-type: none"> Commence reviewing existing literature and research on the topics of reward systems and incentive systems 	<ul style="list-style-type: none"> The process was started in mid-January, and consisted of reviewing 5 main research papers on the topic, and identifying several other resources for more detailed understanding of the topic. The full list of resources is mentioned in the table cell below.
February	<ul style="list-style-type: none"> Examine possibility of applying gamification theories. Explore psychological theories regarding to shaping behavior and promoting specific ways of conduct 	<ul style="list-style-type: none"> The full list of resources examined can be found on this spreadsheet. The various types of publications cover several areas concerning rewards program, behavior shaping and programming, incentive systems and motivation strategies. They provided an overarching view of the implications related to establishing a loyalty program.
March	<ul style="list-style-type: none"> Gather input from the extended IEEE Young Professionals Committee regarding possible 	<ul style="list-style-type: none"> The main findings of the research from January-February were presented at the first Task Force face-to-face meeting, where it was decided that the scope of the project is beyond the expertise of any Task Force member, and it was agreed to seek consulting from experts in the field.
April/May	<ul style="list-style-type: none"> New milestones and checkpoints for the rest of the year have been established 	<ul style="list-style-type: none"> This was due to the project's complexity and need of assistance. Some of the newly established checkpoints and milestones for 2017 include: <ul style="list-style-type: none"> Document Desired Consulting Focus and Obtain Short List of SMEs (June) Request for Information/Consultant Selection and MSA/SOW (July) Inception of Consulting Services (August) Progress Checkpoint and Calibration (October) Full Report (November)

Success metrics and deliverables progress and achievements

Success Metric	Description and schedule
Implementation and development progress	<ul style="list-style-type: none">• Updated cost projections for the project are currently being developed. This will take into account the new approach needed for developing the project concept and deciding on the best implementation strategy.• A report with all the findings, discussions, and journey mapping exercise is being put together, and will be done by end of June.• New deliverable set: create an actionable consultant's report by November Board Series.

Challenges faced currently

- Bandwidth of task force/staff in relation to scope of project

Financial Status

2017 Approved	75K
YTD Expenditure 2017	0K
FYE 2017 Forecasted	50K (consulting fees)

Increasing presence at large-scale events (Signature Event and meetups)

Implementation schedule overview

2017 - Q1	2017 - Q2	2017 - Q3	2017 - Q4
<ul style="list-style-type: none"> ✓ <i>Finalize funding platform</i> ✓ <i>Marketing campaign start</i> 	<ul style="list-style-type: none"> ✓ <i>Evaluate funding platform usage and needed adjustments or changes</i> ✓ <i>Create fund usage projections</i> ● Create feedback system for event organizers 	<ul style="list-style-type: none"> ● Analysis of funding usage ● Reevaluate signature events criteria ✓ <i>Launch event attendees experience surveys</i> ● Identify possible large-scale non-IEEE technical events where signature events can be organized 	<ul style="list-style-type: none"> ● Make any needed adjustment to seed funding criteria ● Create report for IEEE Board regarding the usage of funding ● Analyse impact and outcomes of signature events ● Start organization of 2018 main signature events

Current status overview

Meetups are currently the most popular form of Young Professionals funding, being by far the quickest to be depleted. This could be an indication of young people’s interest in networking opportunities, and desire to increase involvement during technical conferences or other IEEE events. There are also several Signature Events lined up, however the majority will take place in towards the end of the year; in order to secure high-quality Signature Events, all Young Professionals Regional Coordinators were asked to identify large-scale technical events that could be of interest.

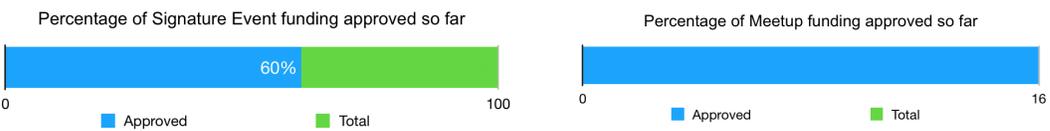
Milestones and Checkpoints

Month	Checkpoint/milestone reached	Description
January	<ul style="list-style-type: none"> Launch Young Professionals funding platform. 	<ul style="list-style-type: none"> The updated funding portal went live on 26th January 2017, along with all other online materials related to it. It can be found at yp.ieee.org/funding-opportunities/.
February	<ul style="list-style-type: none"> Socialize signature events and meetups concept with Regions and Technical Societies. 	<ul style="list-style-type: none"> Funding platform was advertised through the official Young Professionals monthly newsletter, and online social media channels; Young Professionals Regional Coordinators were informed about the funding platform and opportunities on 8th February and asked to forward the information to their Young Professionals Affinity Groups. Technical Society Representatives were informed about funding opportunities through email on 16th March, and during a group call that followed shortly after.
May	<ul style="list-style-type: none"> Create funding usage projections for 2017. 	<ul style="list-style-type: none"> Funding projections for this year were created and publicized during the Young Professionals face-to-face meeting, and were also shared as part of an update with the MGA Board and the MELCC Chair.
June	<ul style="list-style-type: none"> Set up user experience survey; Distribute to members who have already used the funding platform; Pilot event attendees satisfaction survey. 	<ul style="list-style-type: none"> A new survey platform has been chosen to host all Young Professionals surveys: 4eyes.io; The user experience survey is currently under development. According to plan, starting from June 2017 all events' organizers will be requested to perform post-event survey. This data will be used to measure the success of the events and participants satisfaction. The pilot survey was performed already in May and some of the results are presented below: <ul style="list-style-type: none"> Event: Young Professionals Meetup at the Honors Ceremony Amount of Participants: 125 Satisfaction level: 60% Very satisfied, 40% Satisfied Event recommendation likelihood: 86.7% Very likely, 13.3% Likely Survey response rate: 12%

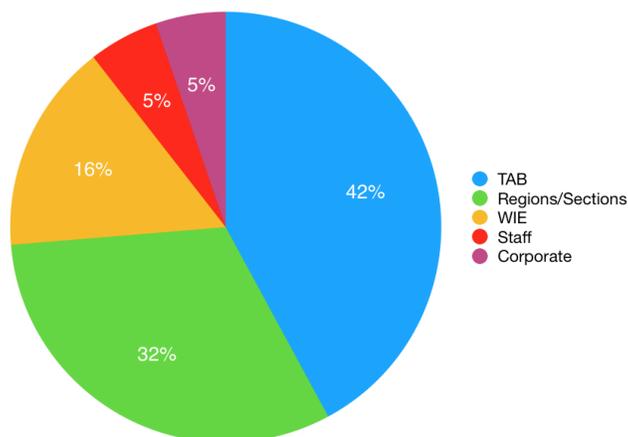
<p>Each month</p>	<ul style="list-style-type: none"> • Monitor funding request and spendings; • Track geographical locations of events that are funded. 	<ul style="list-style-type: none"> • The number and distribution of funding is detailed in the “Financial status” section below; • Funding records are updated every time an application is approved; • The online funding portal has built-in tools that allow easy tracking and monitoring of platform activity.
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Success metrics and deliverables progress and achievements (status)

- Usage and participation/member satisfaction
- Survey results, testimonials and collateral (e.g. interviews/best practices)
- volunteer recruitment, mobilization and unit formation/revitalization
- Partnership satisfaction with corporate sponsor/interunit collaboration
- Brand and network awareness
- Geo targeted gains in engagement and activity

Success Metric	Description
<p>Signature events funding requests</p> 	<ul style="list-style-type: none"> • Approve funding for 5 signature events and 15 meet-ups at conferences.
<p>New internal and external collaborations</p>	<ul style="list-style-type: none"> • Improve collaborations with other organizational units within IEEE. Identify organizational units who are interested in working together, understand their needs and what Young Professionals can offer them, and establish a joint project format (meet-up or signature event). <p>Until now, the majority of meet-ups and Signature Events were organized in collaboration with other IEEE OUs, mainly Technical Societies, which was facilitated by Young Professionals Technical Society Representatives. The chart below shows the percentage distribution of events that were organized in collaboration with other IEEE OUs.</p>

Partnership with other IEEE OUs



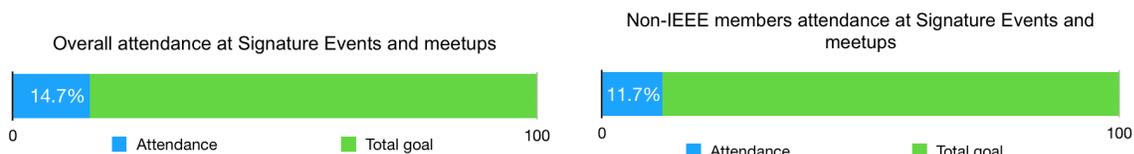
Media coverage

- Amount of media content generated through signature events. This content can include, but is not limited to: online articles, blog posts, social media posts, coverage in any form of print media, either internal (IEEE publication) or external.
- Minimum of 100 unique engagements on social media platforms related to content from signature events. Social media platforms include, but are not limited to, Facebook, LinkedIn, Twitter, Instagram.

Before the event, Facebook posts reached a total of 4600 users, and a total of 27 unique posts clicks and 18 unique user reactions. There were no materials shared post-event.

Estimation of members and non-members involved

- 3000 IEEE members attend events in total
- 1000 non-IEEE members attend the events in total.



The attendance numbers are based on the 2 completed Signature Events, and 3 meetups that have submitted the required follow-up materials.

Challenges faced currently

- Lack of clarity regarding event requirements: by far the biggest challenge is applicants requesting the wrong type of funding for their event. This results from confusion regarding event requirements, and what qualifies as a Signature Event or a meet-up.

- Monitoring follow-up materials: more than half of the events that already took place have not submitted the required follow-up material. This delays the process of issuing funds, and can lead to the risk of blocking funds and rejecting any new applications.

Financial status

Geographical distribution

As of 15th June, 3 Signature Events and 16 meetups have been approved.

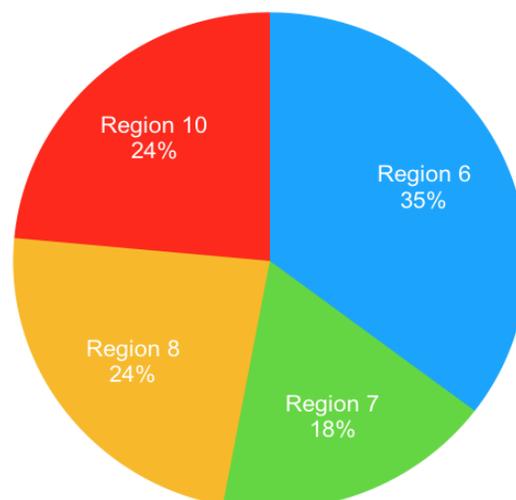
Regarding the 3 approved Signature Events:

- 2 of these have already taken place, in Seattle (RadarConf 2017) and San Francisco (IEEE VICS Summit and Honors Ceremony) respectively. Both locations are in Region 6.
 - 124 people attended the Signature Event at the IEEE VICS Summit and Honors Ceremony. This event has also been used to pilot the attendee satisfaction survey. The results are presented in the “Success metrics and deliverables” section above. This event was staff driven and received \$5000 funding.
 - 60 people attended the Signature Event at RadarConf 2017, one of whom was a non-IEEE member, and 15 of the attendees were world renowned radar scientists, which improved the quality of the networking session. This event was organized by a Technical Society, and received \$2000 funding.
- The third event is scheduled for end of June, in the Republic of Macedonia, Region 8. It will be part of EuroCon 2017, and the main efforts are lead by Region 8 Young Professionals. The event was approved \$2325.

Regarding the 16 meetups:

- Region 7 was approved 3 meetups, Region 8 and Region 10 were approved 4 meetups each, and Region 6 was approved 6 meetups, one of which was hosted together with

Approved meet-up funding divided by Region

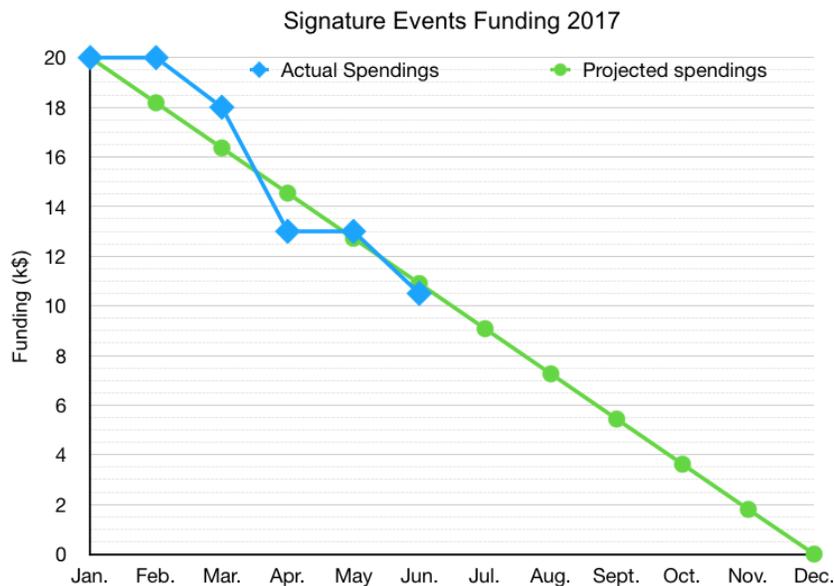


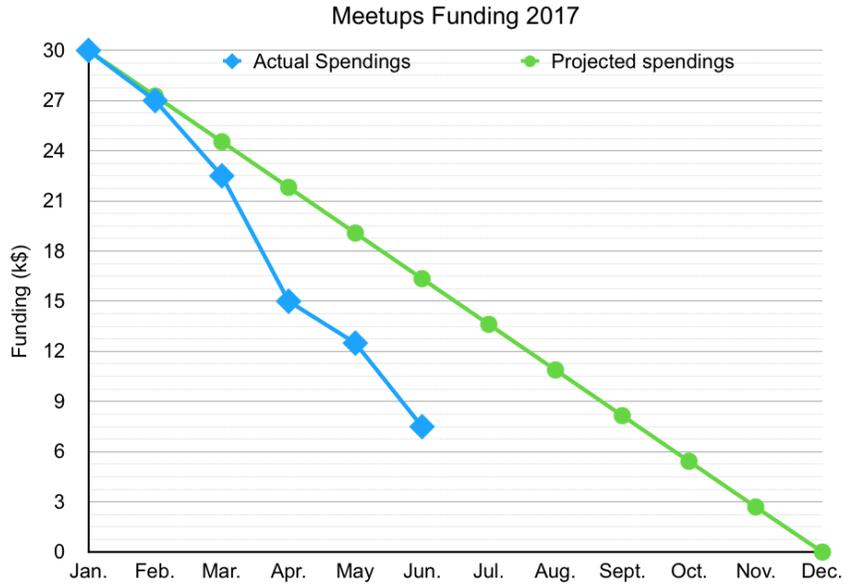
Region 7. Regions 1-5 and Region 9 did not submit any meet-up funding applications.

- Country/Section distribution of approved seed funding is as follows:
 - North America: Canada (Montreal, Alberta), USA (Hawaii, Phoenix, Oregon, San Jose, Santa Clara, Seattle - together with Region 7);
 - Europe: Italy;
 - Middle East: Lebanon, Jordan, Israel;
 - Asia: Bangalore, Australia, Indonesia, Goa.
- 7 of the approved events are led by Technical Societies, while 2 of the remaining ones are related to Women in Engineering (WIE).
- 10 of the events have been completed, however only 3 have submitted follow-up materials.
 - Based on the submitted follow-up material, total of 261 people took part in the events:
 - 32 in Oregon;
 - 80 in Alberta;
 - 149 in Jordan.
- 4 of the requests had to be revised as per feedback before being approved.
- All approved funding was of \$1500 per event.

Funding progress

The plots below represent a comparison of actual spendings vs. spending projections for funding for large scale events with division for meetups and Signature Events.





Large scale events	Funding approved (12th June)	Total funding
Meet-up	22,810	30,000
Signature events	9,325	20,000
2017 Approved	50K	
YTD Expenditure 201	31K	
FYE 2017 Forecasted	50K (additional applications and opportunities to partner)	

High utilization of meetups is associated with long-term planning related to conferences where funding applications for a conference i.e. in December is submitted in February.

Seed funding

Implementation schedule overview

2017 - Q1	2017 - Q2	2017 - Q3	2017 - Q4
<ul style="list-style-type: none"> ✓ <i>Finalize funding platform</i> ✓ <i>Marketing campaigns</i> 	<ul style="list-style-type: none"> ✓ <i>Evaluate funding platform usage and needed adjustments or changes</i> 	<ul style="list-style-type: none"> ● report on usage and projections ● Launch user experience surveys 	<ul style="list-style-type: none"> ● Make needed adjustments to seed funding criteria ● Perform assessment ● Deliver impact report to Boards

Current status overview

Due to its straightforward implementation, seed funding was one of very first projects of the Young Professionals Business Plan to be put into practice, together with Signature Events and meetups. As with Signature Events and meetups funding, seed funding depends on application to the official Young Professionals Funding Portal, which can be found online on the official Young Professionals website (yp.ieee.org/funding-opportunities/). Applications for seed funding have been opened since January 2017, and are evaluated for quality and financial support on a rolling basis. As of the time of writing this report, no challenges or disruptions have been recorded in relation to the online funding application process.

Milestones and Checkpoints

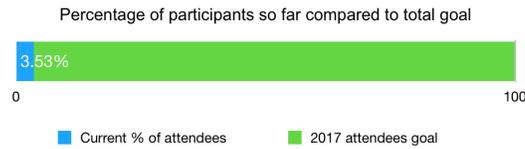
Month	Checkpoint/milestone reached	Description
January	<ul style="list-style-type: none"> ● Set up online funding platform ● Launch online funding platform 	<ul style="list-style-type: none"> ● The updated funding portal went live on 26th January 2017, along with all other online materials related to it.
February	<ul style="list-style-type: none"> ● Launch visibility campaign for funding platform ● Socialize seed funding opportunities throughout Regions and Sections ● Socialize opportunity to TAB liaisons 	<ul style="list-style-type: none"> ● Funding platform was advertised through the official Young Professionals monthly newsletter, and online social media channels; ● Young Professionals Regional Coordinators were informed about the funding platform and opportunities on 8th February and again at the F2F meeting with request to

		<p>forward the information to their Young Professionals Affinity Groups.</p> <ul style="list-style-type: none"> • Technical Society Representatives were informed about funding opportunities through email on 16th March, and during a group call that followed shortly after.
June	<ul style="list-style-type: none"> • Set up user experience survey and distribute to members who have already used the funding platform 	<ul style="list-style-type: none"> • A new survey platform has been chosen to host all Young Professionals surveys: 4eyes.io; currently under development
Each month	<ul style="list-style-type: none"> • Track number of seed funding applications, and rate of approved applications. • Track geographical location of seeded events • Track user experience and attendees/organizer experience through surveys • Multichannel promotion including Sections Congress 	<ul style="list-style-type: none"> • The number and distribution of seed funding is detailed in the “Financial status” section below; • Funding records are updated every time an application is approved; • The online funding portal has built-in tools that allow easy tracking and monitoring of platform activity. • Marketing the opportunities to Affinity Groups and partner units worldwide

Success metrics and deliverables progress and achievements

Success Metric	Description						
Seed funding requests	<ul style="list-style-type: none"> • Depletion of all seed funding by the end of September 2017 - this means a total of 66 seed funding applications approved, should all of them receive the maximum funding of US \$750. <p>Percentage of seed funding approved so far</p> <table border="1"> <caption>Percentage of seed funding approved so far</caption> <thead> <tr> <th>Category</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>Approved</td> <td>16.66%</td> </tr> <tr> <td>Total</td> <td>100%</td> </tr> </tbody> </table>	Category	Percentage	Approved	16.66%	Total	100%
Category	Percentage						
Approved	16.66%						
Total	100%						
Funded events details	<ul style="list-style-type: none"> • At least 3000 participants will attend seed funded events throughout the world. $\frac{2}{3}$ of these attendees (2000) should be IEEE members. <p>Three seed funded events have already taken place, and submitted the event follow-up materials. A total of 106 people participated in the events, which represents 3.53% of the</p>						

participants goal set (3000 participants).



Challenges faced currently

- Relatively lower numbers of seed funding applications to date can be remedied by additional promotion through multichannel mechanisms throughout IEEE with a new awareness campaign to be launched in July-August
- Submission of event follow-up materials: event funding is issued only after the event took place and follow-up materials are submitted. These materials should include, among other things, the final event budget and number of attendees (IEEE and non-IEEE). Nevertheless, the funding platform does not provide any function to send reminders to organizers to submit these materials, nor any other scheduling tools to keep track of when events took place, and what the follow-up materials submission deadline is. Because of this, currently the entire process is manual, and we use spreadsheets to track event dates, submission deadlines, schedule reminders, and send reminders all done individually and on a case-by-case basis. This is a time-consuming process, and it can be at risk of human error.

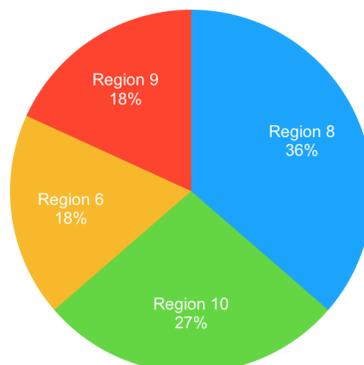
Financial Status

Geographic distribution

As of 15th June, 11 seed funding applications have been approved. Out of these 11 approved applications:

- Region 6 and Region 9 had 2 applications approved each, Region 10 had 3 applications approved, and Region 8 had 4 applications approved. Regions 1-5 did not submit any seed funding applications.

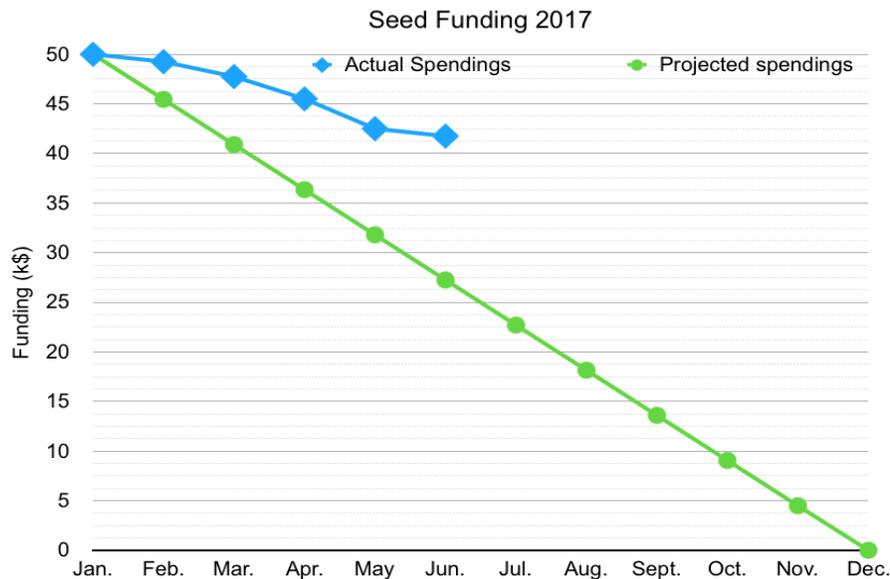
Approved seed funding divided by Region



- Country/Section distribution of approved seed funding is as follows:
 - North America: USA (Seattle, East Bay);
 - South America: Brazil, South Brazil;
 - Europe: Macedonia, Hungary, Croatia;
 - Africa: Tunisia;
 - Asia: Harbin, Bangalore, Kerala.
- 4 of the events have been completed and their funding has been issued.
- Out of the 4 completed events, 3 have submitted all follow-up material:
 - A total of 106 people took part in the events:
 - 35 in Seattle;
 - 19 in Macedonia;
 - 52 in South Brazil.
- 5 of the requests had to be revised as per feedback before being approved.
- All approved funding was of \$750 per event.

Funding progress

The following plot represents a comparison of actual spendings vs. spending projections.



	Funding approved (12th June)	Total funding
Seed funding	\$8,250	\$50,000
2017 Approved	50K (MGA)	
YTD Expenditure 2017	8K	
FYE 2017 Forecasted	25K (projected based on mid year usage)	

Task Force assembly and composition

Operations and duties (Pull from F2F/TF Agenda)

MGA is supporting Young Professionals business planning through a Task Force assembled to develop and test the projects outlined above. The Task Force composition (see below) is designed to ensure targets are met and the allocated financial support is managed effectively. A Technical/Team Lead has been assigned to each project.

The work of the Task Force has been conducted in an intense manner, using teleconferencing, face to face meetings, collaboration tools and multiple communication channels with near daily interaction amongst the team.

Composition of the Task Force:

- Dinko Jakovljevic - Vice-Chair (Computer Scientist, User interface expert)
- Shashank Gaur - Vice-Chair (Computer Scientist, Back-end support)
- Flavia Dinca - Vice-Chair (Sociologist and Web technologies, Human behaviour and computer interactions)
- Ramesh Nair - Vice-Chair (Computer Scientist, Algorithms, Funding portal expert)
- Preeti Kovvali - Vice-Chair (Computer Scientist, Reporting)
- Mario Milicevic Past-Chair (Xplore)
- Rafal Sliz (Committee Chair)
- Ed Palacio (MELCC Chair/Advisor)
- Lisa Delventhal (Staff Accountable)

Financial Status

2017 Approved	40K
YTD Expenditure 2017	6.6K
FYE 2017 Forecasted	40K (MGA supported)