IEEE youngprofessionals

Business plan | 2018

Progress report Jun 2018

IEEE

IEEE Young Professionals
Business Plan Progress Report

June 2018

The IEEE Young Professionals Business Plan is a three-year plan, started in January 2017, in an effort to improve Young Professionals membership rates, and general member satisfaction. For more information regarding the Business Plan, in addition to previous progress reports, please refer to the official IEEE Young Professionals website.

1. Xplore Flex (IEEEXplore content access)

1.1 Updated implementation schedule for 2018

1.2 Current status

As of the time of writing this report, aspects of the Xplore Flex pilot and testing phase have been established, including finalizing the features of the Xplore Flex subscription model (table 1), obtaining a name for it (Xplore Flex), and the information email for the pilot set to be released to a limited number of members.

Objectives and goals of the pilot include gauging opportunities to increase the MDL revenue based on a powerful data set. This will take into account implications to society membership, IEEE membership, content sales, user satisfaction rate, MDL usage. Additionally, the pilot aims to help understand the dynamics between different purchase models, and factors that influence technical content sales. Once finalized, a report will be delivered, detailing the findings and proposals for future development.

Table 1 - MDL Subscription Types

	MDL	MDL Basic	*Xplore* Flex
Price/month	$44	$19.50	$9.99
No. of downloads/mo.	25	3	5
Rollovers	10 doc. rollover	3 doc. rollover	no
Max downloads/mo. w/rollovers	35	36	5
Initial term	6 months	12 months	1 month
Eligibility	Any IEEE member	Any IEEE member	Higher grade YP only
Re-enrollment prohibition	none	none	none

While in the [February report](#) the proposed implementation timeline stated that promotion and marketing was due to start on 1 April, while the pilot was meant to be launched on 19 May, several challenges arose, which delayed the project overall. These are detailed in section 1.2 below.

1.3 Challenges faced

The launch of this pilot required a reusable script (10-15K in expense) to be developed and employed so as to reduce manual data manipulation. The membership data for approximately 30,000 members was brought into production before the 23 May launch date. Half of this group (approx.15K) was designated to receive the existing MDL Basic product offer and the other half (approx. 15K) the new offer. There were a number of unnecessary disputes with Marketing, Sales and Design and Corporate Activities teams surrounding the A/B test messaging which led to a delay in launch. The message proposals for MDL Basic and IEEE Xplore Flex were re-worked several times in order to "level the playing field" so the messages would be largely the same.

In addition, during this period a marketing campaign for the existing product was released with an offer for a free first month, compromising the whole concept of A/B testing, and making adequate comparison between MDL Basic and Xplore Flex impossible. The Business Plan Task Force is concerned about the parity issue which is what delayed the initial launch date. At the date of writing this report the launch date is slated to occur by 11 June, while in the beginning of the year the agreed upon date was 19 May.

1.4 Financial status

2018 Approved	YTD Expenditure	FYE 2018 Forecasted
25K	20K	20 (script development and limited marketing/messaging assistance)

2. Micro-volunteering (μVolunteering)

2.1 Updated implementation schedule for 2018
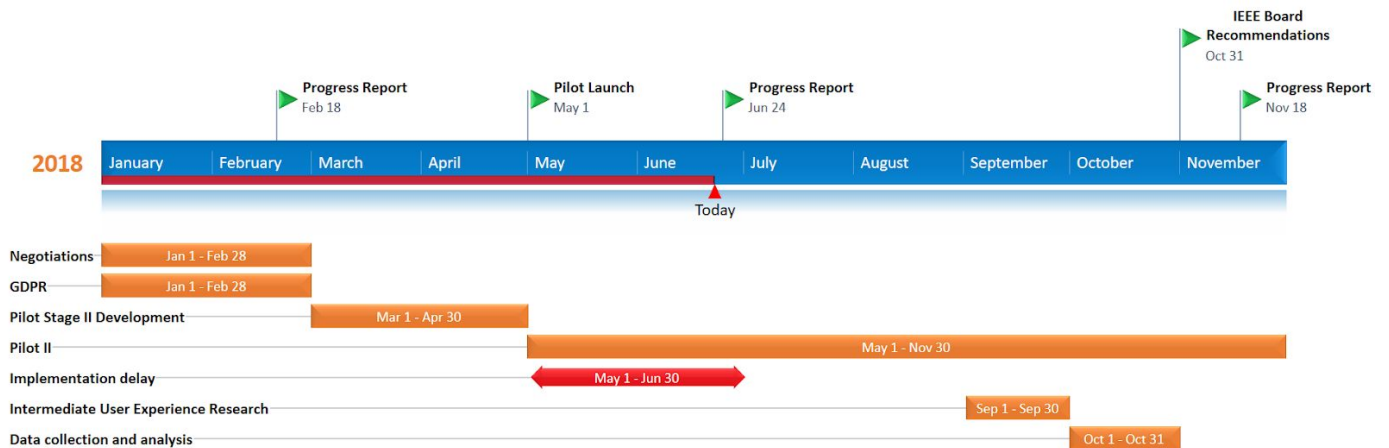
2.2 Current status - pilot preparations

2.2.1 Platform features

At the time of writing, the second μVolunteering pilot is in its final preparatory stage. The IEEE Young Professionals Executive Committee along with the selected vendor are developing the online platform which will host the pilot, in terms of UI, templates, and features. The online platform will distribute users into communities based on their parent Section and any affiliations to Technical Societies (one community will represent one Section or Technical Society). Within these communities, members will be able to search and apply for volunteering opportunities, build their volunteering CV, and interact with other IEEE members and volunteers for the purpose of increasing engagement at the local level. For each community, 2 to 10 members will be selected to receive administrative privileges - champions, allowing them to maintain their community, post and manage volunteering opportunities, and moderate forum discussions.

2.2.2 Pilot participants

As this is a pilot, the number of participants is limited. The platform will allow for 25 communities to be created, each representing one IEEE organizational unit (OU). The OUs were selected from the pool of respondents to a Call of Interest that was sent out to all Sections, Technical Societies, Young Professionals Affinity Groups (YP AG), and Region and Division Directors. The selection criteria accounted for the OUs application (interest and motivation) to be part of the pilot, their level of activity (number of activity reports on vTools in the past 12 months), and YP's level of engagement in the respective OU if it was not a YP AG. The chosen OUs are:

● **Sections:**

○ Princeton/Central Jersey (Region 1)
○ Philadelphia (Region 2)
○ Houston (Region 5)
○ Hawaii (Region 6)
○ Orange County (Region 6)

○ Seattle (Region 6)
○ Southern Alberta (Region 7)
○ Vancouver (Region 7)
○ Tunisia (Region 8)
○ Lebanon (Region 8)
○ Spain (Region 8)
○ Sweden (Region 8)

○ Bahia (Region 9)
○ South Brazil (Region 9)
○ Hyderabad (Region 10)
○ Kerala (Region 10)
○ Seoul (Region 10)

● **Technical Societies:**

○ Consumer Electronics Society
○ Nuclear and Plasma Sciences Society
○ Industry Applications Society
○ Aerospace and Electronic Systems Society
○ Power Electronics Society

○ Computer Society
○ Communication Society
○ Solid-State Circuits Society

As each OU will have its own online community, these will be personalized to reflect their individual needs and interests. Related art is in the process of being created for all pilot OUs, with a few examples provided below.

2.3 Challenges faced

A number of challenges and significant delays were encountered during the preparation phase for the pilot. The main setback occurred because the design for automating the population of the pilot communities would not be in compliance with the new GDPR regulations (mandated on May 25th) without additional programming efforts. The IT team vetted the vendor for compliance with GDPR rules prior to signing agreements on 1 March of this year. However, IEEE use of data via APIs from IEEE systems to the vendor online platform must also use data in a compliant manner.

During this period a longer term approach was developed to achieve pilot goals and align with compliance regulations. An interim approach allows us to use IEEE web account sign-in and manually populate US participants into the selected Section communities so that the pilot can commence. This provisional approach allows us to launch so that we can begin to use the platform and receive feedback on the pilot. These users will transition seamlessly into the longer term approach once the additional programming is completed.

The additional programming effort, enabling just-in-time account creation (a more automated process that will allow us to open up beyond non European Union participants and Society communities), will necessitate us to supplement the originally approved contract with the chosen vendor. This will occur by way of an amended statement of work, for additional services at 9.5K which must go through the procurement and legal processes. This amendment should be more expedient than the initial contract negotiation as it is incremental. We expect the additional coding effort to be completed by or before 1 September. At that time, we can extend the pilot to remaining populations (EU participants and societies) to expand its use. As of the writing of this report, the amendment was in a draft form with high level requirements discussed with the vendor.

2.4 Financial status ($k)

2018 Approved	YTD Expenditure	FYE 2018 Forecasted
200K	65K	200K

3. Loyalty program for dedicated volunteers

3.1 Updated implementation schedule for 2018
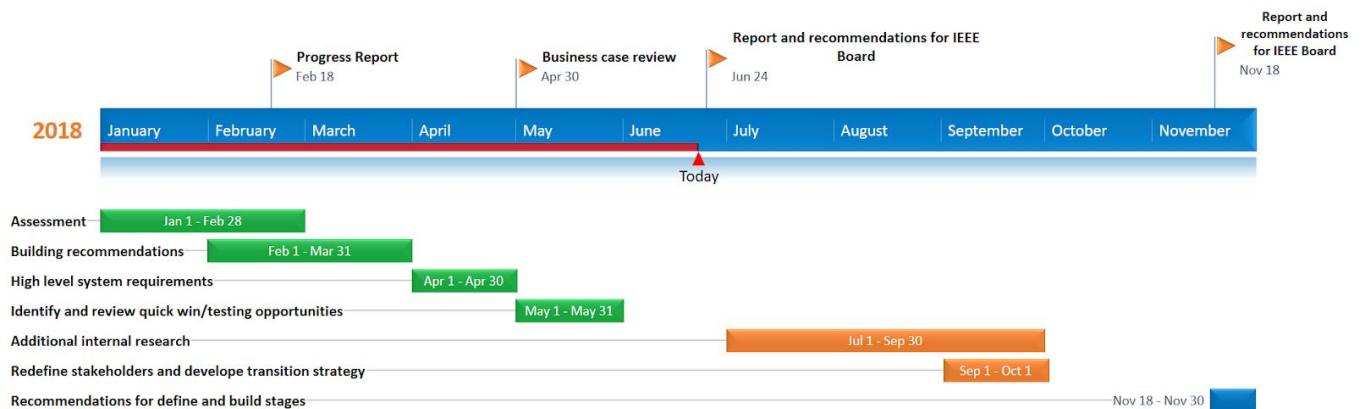
3.2 Current status

As a continuation of the discovery and assessment phase that took place in 2017 Q4, a set of high-level recommendations were created, which also include 2 proposed concepts or projects that may be of interested to explore in the following research phase. These concepts are shortly outlines below, and the criteria they address is presented in table 2:

1. Recognition and rewards for loyal members and engaged volunteers: an opt-in membership program that unlocks value in return for ongoing engagement with Young Professionals, whereby members' activities and level of engagement within IEEE is measured and rewarded accordingly. This can be done, for example, through "IEEE credit points" that can then be used for various purposes. The overall aim of this program is to highlight the value of the membership, as well as to make members feel like IEEE acknowledges them and their efforts. Because of the fashion in which this program would be put into practice, necessarily involving tracking member behaviors, it would provide invaluable insights into how IEEE can develop and grow in order to better address member needs and interests, thus boosting membership retention and satisfaction in the long-term.

2. My Career Coach: a platform for young members to receive (or give) relevant training and guidance tailored for specific career paths, be inspired by technology pioneers who are part of IEEE, and actively engage on a personal level in the global network of IEEE members. The main aspects addressed through this program are personalization of services and benefits, reduce the search time when members seek support from IEEE, and improve learning opportunities. It aims to lay the foundation for a multi-dimensional, long-lasting relationship between IEEE and its members.It would also provide a unique benefit as IEEE's prestige would allow for trustworthy specialized career support, which currently is rather limited on the market.

During the IEEE Young Professionals Face to Face meeting in Mexico, the IEEE Young Professionals Committee passed a motion related to prioritization of the My Career Coach. At this stage our resources allows us to continue development of the two recommendations, as they both are important for the organization.

Noteworthy, to make our work more efficient and more fruitful for IEEE, we started close collaboration with the TAB Society Membership Committee. Thanks to this cooperation we can combine our efforts and understand better the needs of our members and develop appropriate product.

Table 2 - Proposed concepts and membership loyalty aspects they address

Design Criteria	Recognition & Reward	Career Coach
Reward and recognize transactional and non-transactional activity, across the organization	+	−
Deliver value that is aligned with member activity, both financial and non-financial, as members add value in different ways	−	+
Increase membership retention by driving engagement	+	+
Increase satisfaction among members by continuously improving the value they receive from IEEE	+	+
Drive incremental revenue by guiding members to relevant content, education and conferences	+	+
Drive advocacy and referral	−	+

3.2 Challenges faced

One concerning challenge is high interest among many IEEE stakeholders. Although it has positive aspect demonstrating that IEEE as a whole is interested in this project, as many units involved that many ideas that often do not fit together. Nonetheless, the importance of working together is critical to success of this project and therefore we are open for partnerships. Our Consulting partner indicated a strong need for IEEE system integration and the need of using Marketo to evaluate the success.

3.3 Recommendations to the IEEE Boards

The IEEE Business Plan Taskforce recommends to the MGA Board and IEEE Board of Directors to continue this project by proceeding to the recommendation definition stage, where feasibility and solutions for the two proposed concepts presented in section 3.1 will be explored, and results along with a proposed action plan will be presented to the IEEE Board for approval in November 2018.

3.4 Financial status

| 2018 Approved	YTD Expenditure	FYE 2018 Forecasted
160	25[1]	160

[1] the initial 25K has been committed for the first part of the recommendations phase which will be evaluated before a second $28K is committed. The first part is currently advancing through the procurement and legal processes with an overarching master services agreement and associated statement of work. Additional details provided upon request to yp@ieee.org.

# 4. Young Professionals Signature Events and meet-ups: increasing presence at technical events

4.1 Current status

To date, 17 meet-ups and 5 signature events have been approved for 2018, representing 57% and 100% of this year's goals for funded events. Regarding the distribution of funding based on the OU that organized the event, there has been an increase in the amount of Technical Societies applying and being granted this type of fundings, in comparison to 2017 (two events were co-organized by several Technical Societies, together with YP Affinity Groups).
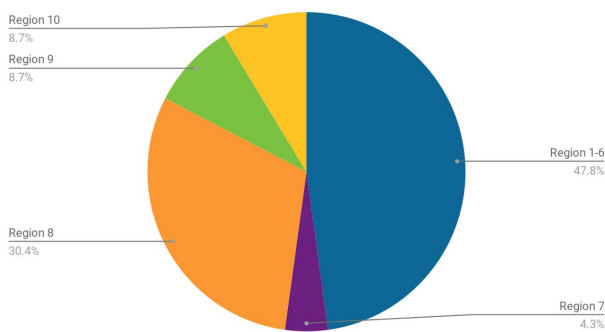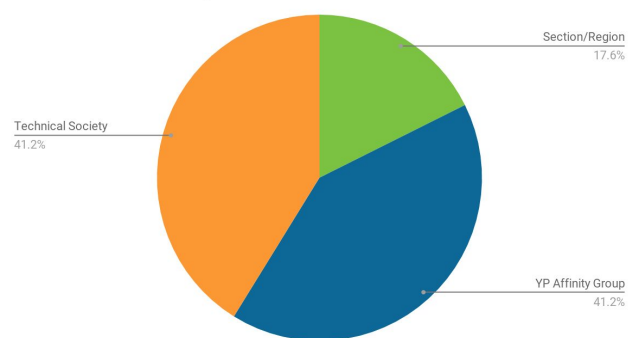
Of these, 7 meet-ups and 2 signature events have already taken place and submitted the required post-event reports., while the number of attendees is detailed in table 3.

Table 3 - Meet-up and Signature Events attendee status

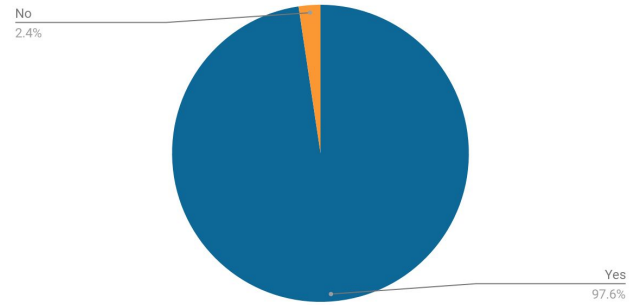| Signature Events			
Total attendees	IEEE-member attendees	Non-member attendees	Cost per attendee
365	324	41	$27.39
Meet-up events			
Total attendees	IEEE-member attendees	Non-member attendees	Cost per attendee
1165	631	534	$10.3
Overall			
Total attendees	IEEE-member attendees	Non-member attendees	Cost per attendee
1530	955	575	$18.84

4.2.1 Attendee feedback

Each funded event has its own attendee satisfaction survey provided. The survey is attached in Annex 1 of this document. While the survey was not distributed at the signature events that have been organized so far, a total of 296 individual responses were collected from the 7 meet-ups that have already taken place and submitted their post-event reports. A summary of the results is shown in the diagrams below, based on the survey questions.
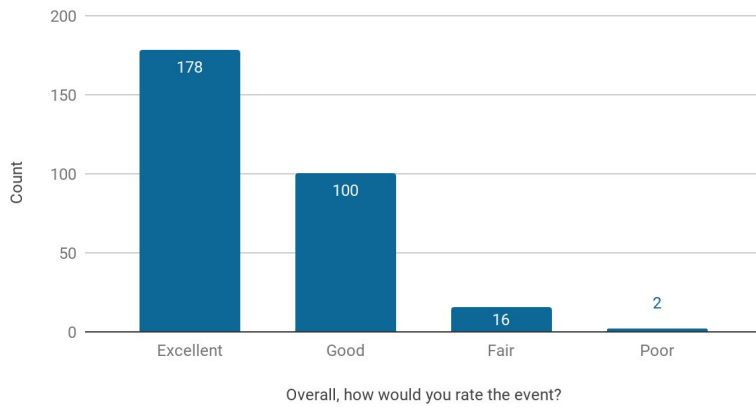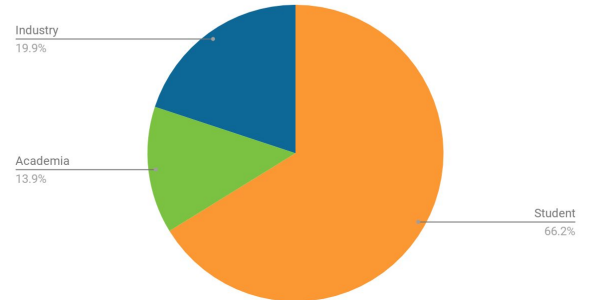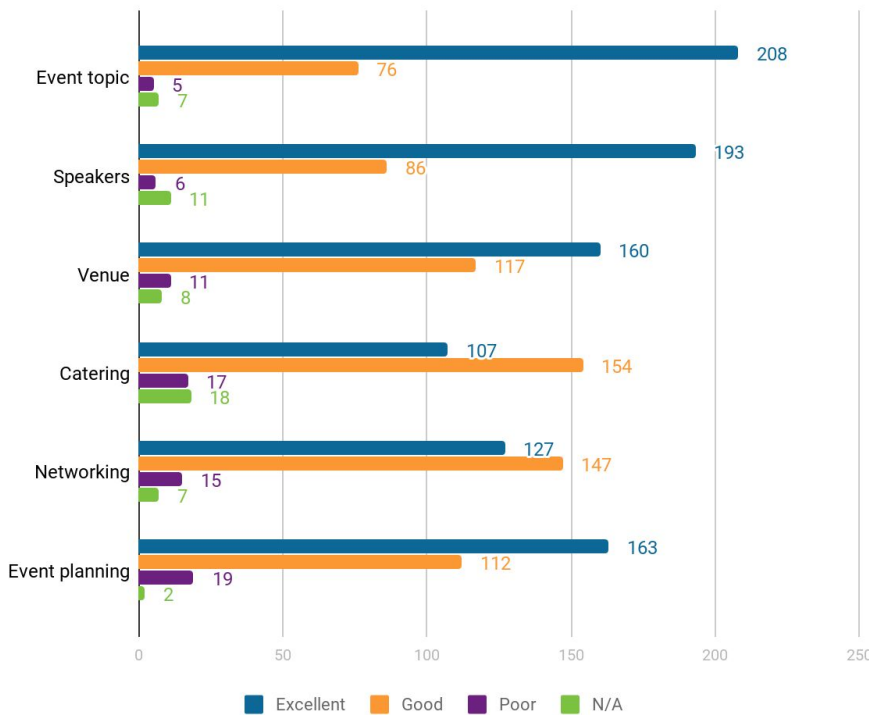
Overall, how would you rate the event?

Ratings of several aspects of the event

Would you be interested in attending future IEEE Young Professionals Events?

No 2.4%
Yes 97.6%

Current Occupation

Industry 19.9%
Academia 13.9%
Student 66.2%

Are you an IEEE Member?

No 39.9%
Yes 60.1%

Would you recommend this event to friends?

No 4.1%
Yes 95.9%
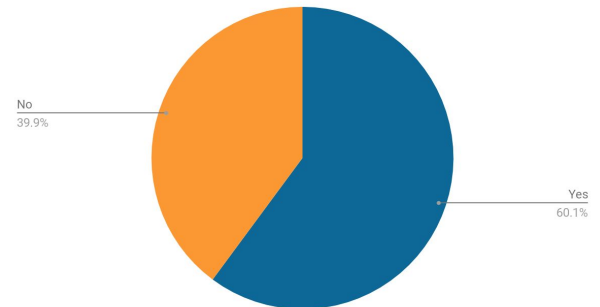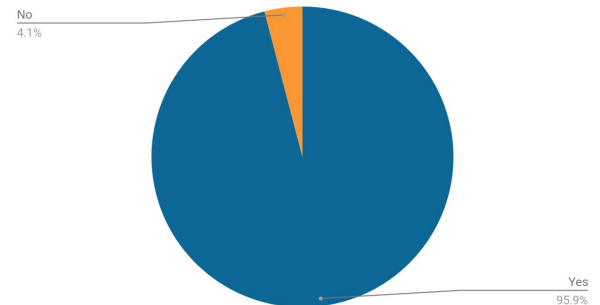
4.2.2 Progress on 2018 Goals

2018 Success Metrics	Signature events and meet-ups	Current Status
Amount of Funding Applications	40	22 (55% of goal)
Amount of Organized Events	35 (5 Signature, 30 Meet-ups)	10 (2 Signature, 7 Meet-ups) 28.57%, 40%, 23.3% respectively, of goals
Attendance (members/non-members)	3500 Members 2000 non-Members	955 Members (27.28% of goal) 575 non-Members (28.75% of goal)
Event costs $/per person	<$15/per person	$18.84/person ($3.84 above the goal price)
Internal and external collaboration	3 internal long-term collaborators agreements 1 external partner MoU	No long-term collaborations has been established within IEEE so far Collaboration with DigiKey, which started in 2017, has been extended for a further 12 months, while collaboration with Google Developers has started in Q1 of 2018
Amount of related publications	25 Impact articles 2000 Facebook engagements 5 non-IEEE publications	2 Impact articles (8% of goal) 689 Facebook engagements (34.45% of goal), with 12,723 unique users reached No information about non-IEEE publications is available
Attendees Satisfaction	>75% in the top box (>80% satisfaction) Response rate >15%	60% in top box currently (93.9% satisfaction overall)
Organizers Satisfaction	>75% in the top box (>80% satisfaction) Response rate >25%	Surveys for organizers have not been deployed yet

4.2 Challenges faced

While improvements have been made in comparison to 2017, difficulties still remain in terms of engaging non-IEEE members and ensuring a non-skewed distribution of funds per Region. Additional challenges are caused by the fact that large-scale non-IEEE events are planned several years in advance, while the IEEE funding/budget cycle is annual, resulting in difficulties in becoming involved with such events simply due to the fact that financial commitments spanning more than 12 months are not possible in the current IEEE financial environment. Furthermore, it has become apparent that there is a low interest from industry in terms of collaborating for in-person events.

It is worth noting, however, that a large density of events tend to take place in the third quarter of the year, which means the current trends seen in this progress report are not representative of the entire 12-month period.
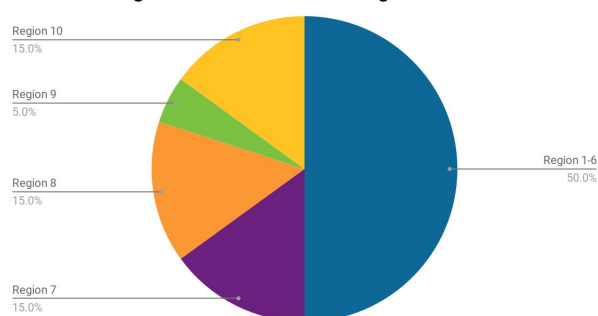
4.3 Financial status ($k)

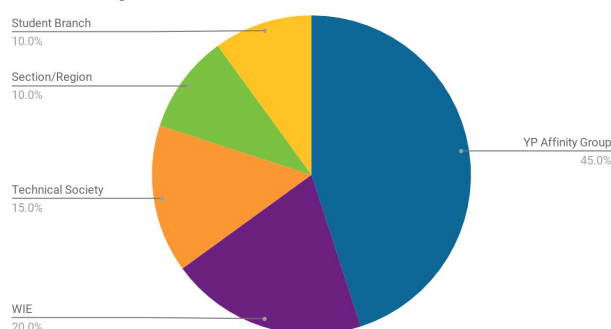| 2018 Approved	YTD Expenditure	FYE 2018 Forecasted
87.5	35.9 transferred (out of 49.4 already allocated)	87.5

5. Seed funding

5.1 Current status

To date, 19 seed fundings were approved, of which 5 events have already submitted the required post-event materials. There has been a significant improvement in terms of the distribution of seed funding across the Regions, showing more diversity and less monopoly held by 1-2 Regions than in 2017. Additionally, a wider variety of OUs have applied and been granted seed funding for their events.

Seed funding discribution across Regions

Region 10
15.0%

Region 9
5.0%

Region 8
15.0%

Region 7
15.0%

Region 1-6
50.0%

Seed Funding Distribution based on OU

Student Branch
10.0%

Section/Region
10.0%

Technical Society
15.0%

WIE
20.0%

YP Affinity Group
45.0%

A total of 225 attendees participated in the 5 seed funded events that have submitted the post-event reports, with further details summarized in table 4.

Table 4 - Seed funded events attendee status

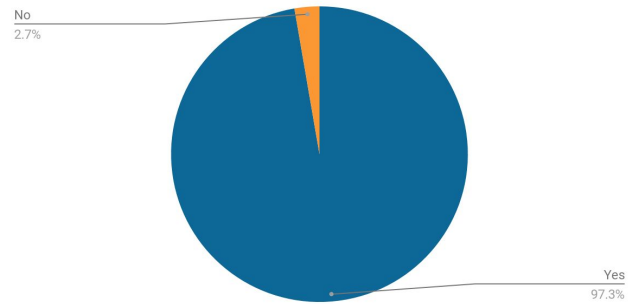| Seed funded Events			
Total attendees	IEEE-member attendees	Non-member attendees	Cost per attendee
225	146	79	$16.66

5.1.1 Attendee Feedback

A total of 64 individual responses were collected from the 5 seed funded events that have already taken place and submitted their post-event reports. A summary of the results is provided below, based on the survey questions.
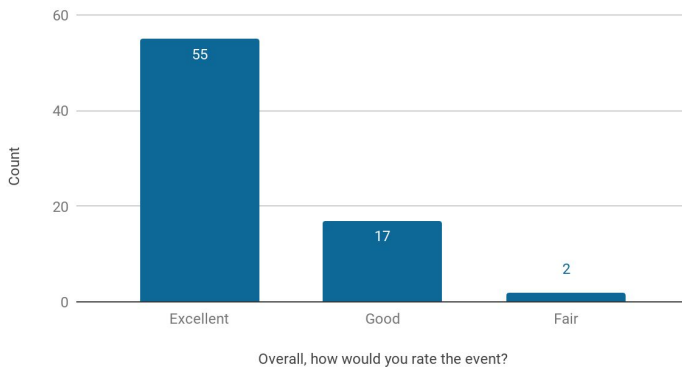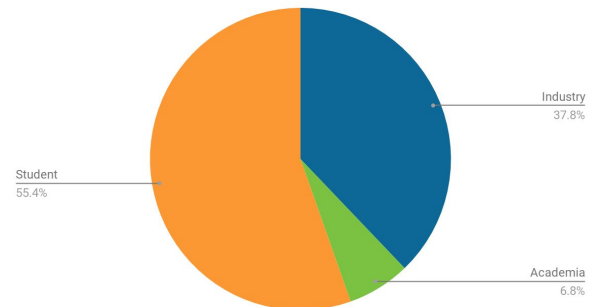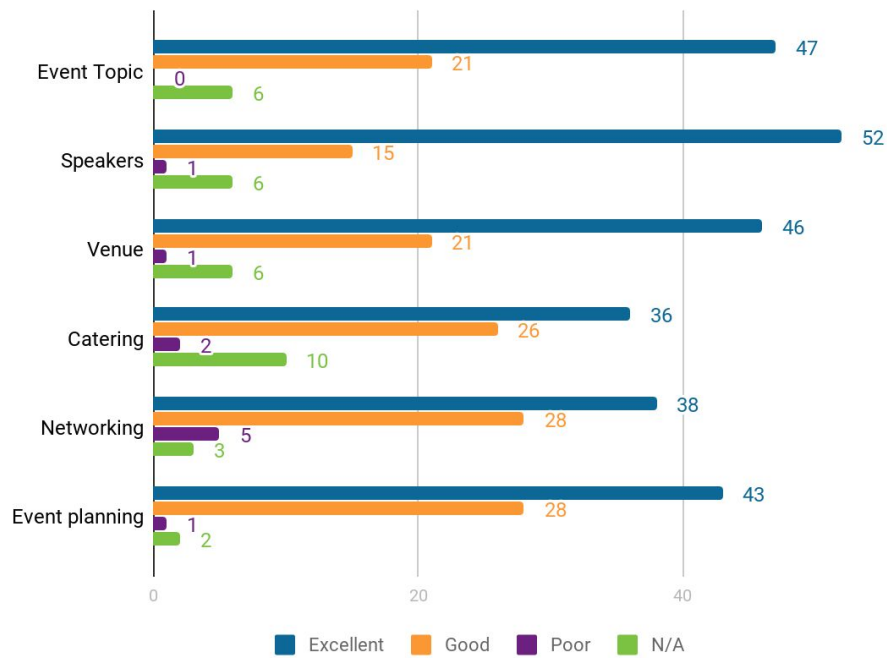
Overall, how would you rate the event?

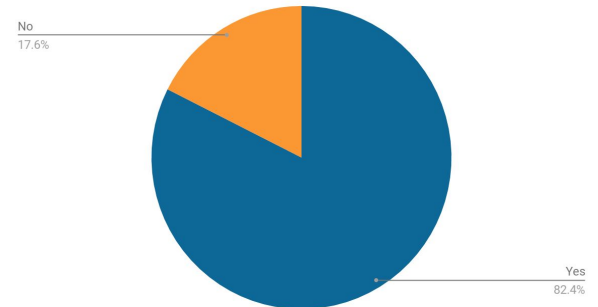## Would you be interested in attending future IEEE Young Professionals Events?

No
2.7%

Yes
97.3%

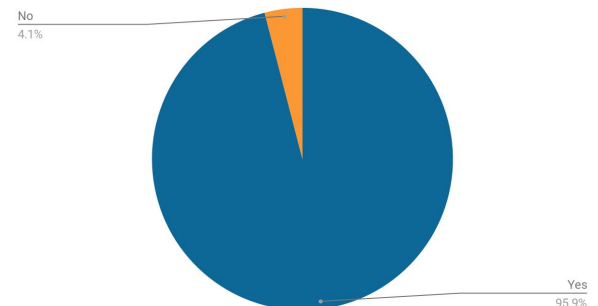## Current Occupation

Industry
37.8%

Student
55.4%

Academia
6.8%

Ratings of several aspects of seed funded events

Aspect	Excellent	Good	Poor	N/A
Event Topic	47	21	0	6
Speakers	52	15	1	6
Venue	46	21	1	6
Catering	36	26	2	10
Networking	38	28	5	3
Event planning	43	28	1	2

Are you an IEEE Member?

No
17.6%

Yes
82.4%

Would you recommend this event to friends?

No
4.1%

Yes
95.9%

15

5.1.2 Progress on 2018 Goals

2018 Metrics	Seed funded events	Current status
Amount of Funding Applications	55	20 (36.36% of goal)
Amount of Organized Events	50	5 (10% of goal)
Attendance (members/non-members)	2500 Members 2000 Non-Members	146 Members (5.84% of goal) 79 Non-Members (3.95% of goal)
Event costs $/per person	<$9/per person	$16.66/per person (85% over the goal)
Amount of related publications	5 Impact articles 1000 Facebook engagements	2 Impact articles (40% of goal) 46 Facebook engagements, (4.6% of goal), reached 1675 individual users
Attendees Satisfaction	>75% in the top box (>80% satisfaction) Response rate >15%	85.93% in the top box (100% satisfaction)
Organizers Satisfaction	>75% in the top box (>80% satisfaction) Response rate >25%	Surveys for organizers have not been deployed yet

5.2 Challenges faced

While there is an improved interest in seed funding in comparison to 2017, the overall trend still falls somehow behind the expected model, with fewer seed funding being approved thus far than it was expected ideally. As further marketing will be conducted to increase awareness of this funding opportunity, funds are still expected to be depleted by the end of 2018.

5.3 Financial status ($k)

2018 Approved (MGA supported)	YTD Expenditure	FYE 2018 Forecast
50	3.36 transferred (out of 15 already allocated)	50 (MGA supported)

Annex 1 - Event Attendee Feedback Survey

Event Feedback

Thank you very much for attending the IEEE Young Professionals event. We hope you had a pleasant time networking with peers in your area. We would greatly appreciate your feedback about this event, and any suggestions you may have on how such activities can become even more engaging.

* Overall, how would you rate the event?

○ Excellent

○ Good

○ Fair

○ Poor

* How would you rate the following individual aspects of the event?

	Poor	Good	Excellent	N/A
Event Topic	○	○	○	○
Speakers	○	○	○	○
Venue	○	○	○	○
Catering	○	○	○	○
Networking Opportunities	○	○	○	○
Event Planning and Organization	○	○	○	○

* Would you be interested in attending future IEEE Young Professionals events?

○ Yes

○ No

* Would you recommend this event to your friends or colleagues?

○ Yes

○ No

* Which of the following best describes your current occupation?

○ Student

○ Academia

○ Industry

* Are you an IEEE member?

○ Yes

○ No

Any other thoughts or comments? All feedback is greatly appreciated and crucial in improving the relevance of such events.

100%

[Done]