

Strategic Thinking for the Section

BY ALEXEI BOTCHKAREV

*Past Chair, IEEE Toronto Section
Adjunct Professor, Ryerson University, Toronto*

[IEEE's Toronto Section](#), founded in 1903, was the first section of the American Institute of Electrical Engineers—one of IEEE's predecessor societies—outside the United States. With a current membership of around 4000, it is the largest in Canada and one of the largest sections in the world. It has 16 technical chapters, four affinity groups, 12 standing committees and student branches in 6 universities and colleges.

Having had the privilege of serving as the Toronto section's chair for 2008 and 2009, I'd like to share what worked successfully for the section and voice some points of concern. My hope is this will help chairs and other officers of IEEE's more than 300 sections who are trying to develop strategic initiatives for their sections.

Key to the Toronto Section's success has been the human factor. The section is managed by a 40-member executive committee including four officers who are elected every two years. A second "circle" of volunteers includes chapter vice chairs, treasurers, and secretaries, which brings the total number of the section's most active volunteers to about 100. It is the dedication and passion of these professionals that make the section so valuable for its members. This high-energy leadership group and its virtually unlimited resource of volunteers allows the section to deliver great events and set a vision to be nationally and internationally recognized as a leader.

FORMING A STRATEGY

The most important task for the section chair and officers is to set up a strategic direction for the next term (usually two years). Of course each section's strategic direction will be different and will depend on its priorities, resources, and other factors. In laying out a strategy, however, any section generally will want to influence a large segment of its membership, address technical interests shared across chapters, stimulate collaborative work among the executive committee members, and increase the section's public visibility beyond the confines of IEEE.

In conformity with such criteria, sections adopt strategic initiatives to advance their general goals. Initiatives can be a one-time event or a series of coordinated activities. Experience shows that there should be no more than three to five such initiatives in a given term. But they do not and should not replace regular events delivered by the individual technical chapters and committees.

In the most recent term, 2008-09, the Toronto Section sought to increase the number of senior members and strengthen its internal organization, in particular by extending participation by Toronto Section chapters to all IEEE societies. In addition, we organized an international conference on science and technology for humanity, an IEEE Milestone recognition ceremony honoring the external cardiac pacemaker, and IEEE 125th anniversary activities to celebrate the history of the global organization and contributions to the profession by the section's members.

Through individual or joint technical chapters, members of the Toronto Section were affiliated with at least three quarters of the societies. One of the important membership benefits is the opportunity to communicate with peer members locally. But there were nine IEEE societies in which no Toronto Section chapters belonged.

To make society representation universal, our approach was to set up new joint chapters or reorganize such chapters so as to establish initial conditions for local services to be provided to a wider segment of membership. Creating additional affiliations is not just a numbers game, but experience shows that for each registered society member, there are at least two to three

members who are interested in the field but do not join for economic reasons. Therefore, the total estimate of members who could benefit from this initiative was more than 500, which constitutes a large portion of the local IEEE community.

Although two new chapters were formed—Nuclear and Plasma Sciences, and Magnetics—most of the new affiliations were created by adding new societies to the existing chapters, which are called joint chapters. This approach has a few advantages over creating new chapters. First, the petition to form a joint chapter is easier because it requires only six signatures of the members of the prospective society compared to 12 signatures required for a new chapter. Second, it's a bit easier to set up a newly affiliated joint chapter due to the existing structure and leadership of the base chapter.

Some societies, to be sure, do not look favorably at joint chapters. Because formation of a joint chapter needs approval of all associated societies, it sometimes can become a lengthy process. Our initiative of affiliating nine societies took two years. But the Toronto Section now has affiliations with all IEEE societies and is only the second one, after the IEEE Italy Section, to achieve universal representation.

The section is making efforts to build core leadership in all joint chapters for the newly affiliated societies. One recommendation is for each joint chapter to have a vice chair for each affiliated society. The ultimate goal is to build up all IEEE technical areas by using joint chapters as “incubators” to prepare and launch individual chapters as they become ready.

POINTS TO PONDER

An important section chair responsibility is recruiting volunteers and making appointments. This work may not be as visible as other tasks, but the results will determine the face of the section for years to come. Thus, decisions in this area can have positive and negative long-term effects.

To make this process work more effectively and efficiently, procedures need to be more clearly spelled out in the IEEE official documentation, primarily in Section 9 of the IEEE Member and Geographic Activities Operations Manual. The manual calls for annual elections of all section and chapter officers. By all means, an election is key to having a dynamic section management. The access to the centralized IEEE voting system (vTool) is absolutely necessary to make elections a reality for geographic units of all levels. Some parts of the process, however, seem to fall into a gray area. For example what's the process of appointing chairs of the section's standing committees such as History and Awards? What's the procedure for replacing a chapter chair if the elected chair resigns before the next election? Arguably, a section chair should be given the authority to act promptly in such situations and make a temporary appointment.

Another question that arises more often than we'd like it to admit is what can be done if a chapter or committee chair or volunteer in any other position is not performing prescribed duties or is not meeting minimum requirements—a chapter chair who has not organized two events per year, for example. The current policy provides a simple answer: The chapter should be dissolved. But should a whole chapter be held responsible for the inaction or inability of one person? These questions lead to a sensitive and not often discussed notion: Can a volunteer be fired? My answer is yes. However, there should be an official process that should be documented in the manual.

Another point to consider is what formal role, if any, chairs play in the section after the term of office is over? The manual doesn't proscribe any, and does not even mention the existence of the section's past chair. That doesn't seem to be a wise utilization of the experience, knowledge, and skills the chair acquires during their term.

I suggest having past chairs consecutively head up the Nominations, Awards & Recognitions, and History committees for two-year terms. This would better preserve accumulated knowledge and experience—and also would guarantee rotation of the chairs for the committees.

Thank you for allowing me to share my thoughts with you.