



IEEE Region 3 Senior Member Roundup Process Documentation

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Executive Summary

The membership rank of Senior Member is a recognition of accomplishment and longevity in an IEEE member's career. The IEEE process to attain Senior Membership is simple, but the challenge of meeting the requirement for endorsements can prevent many eligible members from completing the process. This process outlines a region- and section-level approach to overcome these challenges and creates a predictable and enjoyable engagement that not only results in new Senior Members but also creates a renewed sense of engagement and community in long-standing IEEE members who otherwise may feel disconnected.

This Roundup process was initially developed by the Florida West Coast Section (FWCS) in 2020 as an evolution of an ad-hoc, telephone-based interview process. In 2021 the process evolved to support Region 3 with an average of 40 candidates every two months, with a standing pool of over 100 volunteering Reference Providers. In 2023, the Roundup includes 150 volunteering Reference Providers, dozens of volunteers serving in various committee roles, and a growing set of Senior Member opportunities for career growth and enrichment.

For more information about this process, please contact:

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Change log

| Change | Change summary | POC | Date |
|--------|--|--------------|--------------|
| 1 | Initial FWCS publication | Andrew Seely | 29 Sept 2021 |
| 2 | Incorporate Region 3 review comments | Andrew Seely | 13 Oct 2021 |
| 3 | Incorporate additional review comments | Andrew Seely | 15 Oct 2021 |
| 4 | Update process diagram | Andrew Seely | 18 Oct 2021 |
| 5 | Publish R3 v2.0 | Andrew Seely | April 2023 |
| 6 | Publish August 2023 version with minor updates | Andrew Seely | August 2023 |
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Purpose

A successful IEEE Senior Membership nomination package can be completed through a resume review alone as outlined by the IEEE Senior Member requirements, without the reference provider personally knowing the candidate. The Region 3 (R3) Senior Member Elevation Committee (SMEC) has determined that there is a large group of potential Senior Members who feel disconnected from the IEEE as an organization. While they continue to renew their membership year over year, they don't have a sense of personal engagement or investment, and they struggle to contact other members to support their Senior Membership. The purpose of this program is not to require all potential Senior Members to follow this process, but to enable those members who value the personal connection to have an easier path to advancement.

The SMEC process conducts live interviews remotely using video conferencing tools. The team feels that the interviews are an essential part of the elevation process, allowing for Reference Providers to meet the IEEE requirement for acquaintance with the candidate and check "yes" to the question if the candidate is personally known. The interviews also create new relationships and a sense of engagement and belonging for members. Interviews are not required for the general IEEE process, but they are required for the specific SMEC process.

The outcomes of the SMEC process include:

- Ability to scale up to a high volume of candidates to be nominated
- Process oversight ensures that all parties "do their part" and nomination packages are completed by deadlines set by the Admissions and Advancement Committee (A&A)
- Monthly cadence tracked against A&A schedule leads to easily managed expectations
- A Reference Provider pool of Senior Member volunteers gives opportunities for IEEE volunteering at a low obligation level, increasing sense of belonging and contribution
- The interview days create a renewed sense of value in many members, especially Life Members who have not been directly involved with IEEE for many years and who did not know about the possibility of advancement to the Life Senior Member rank
- The elevation event offers candidates and reference providers an opportunity to network with professional IEEE members from a variety of engineering fields and build professional relationships.

Overview

The R3 SMEC process is derived from the process provided on the IEEE Senior Membership site: <https://www.ieee.org/membership/senior/senior-member-elevation-toolkit.html>

The R3 Senior Membership Coordinator communicates with eligible members through E-Notice and the Region 3 newsletter. Interested candidates are asked to provide a Resume in the format provided. A Saturday date is selected every two months for the Senior Member interview event, timed to align with the A&A Review Panel meetings. The candidate's availability is verified along with his/her membership validity. If they are unable to attend, they are either rescheduled for the next event or they are treated as an Edge Case and scheduled out of cycle.

The SMEC team has an established pool of Reference Providers. The Reference Provider pool is queried for their availability and limitations. All members who are available for the specific day are then assigned in pairs to each candidate and given access to the candidate resume at least one week in advance.

Section leadership for each candidate are contacted and requested to provide a Section nominator. If a Section is unable to provide a nominator, those candidates are nominated by other sections. All candidates will have their nominations initiated by a member of the SMEC or a Section officer to ensure the Senior Member rebate is captured and to help achieve goals for 100% section engagement with their Senior Members. By limiting the nominations to a small team, oversight of the process of Reference Providers and A&A approvals is made possible.

Section contacts, membership metrics, and participation numbers are tracked in the "Sections Data Tool" developed by the Senior Member Coordinator. Details provided in the process document "How to Build the Section Engagement Data Tool."

The schedule is then created with 30-minute windows for interviews, with the pacing of the interviews determined by the availability of the Reference Providers.

An optional Reference Provider training session is held in advance of the interview day. On the interview day, an optional orientation session is held in advance of the first interviews.

At the conclusion of the interviews, the nominating team tracks the progress of Reference Providers and ensures completion by the A&A submission deadline, substituting Reference Providers if needed to ensure completion.

Process Diagram



Recruiting

Reference providers

The Region 3 Senior Member coordinator regularly publishes calls for volunteers for Reference Providers from Region 3. Willing and engaged Reference Providers are curated in a protected tracker, with name, email, section, and member numbers collected. The team also contacts newly promoted Senior Members who have participated in this process to offer the opportunity to serve as a Reference Provider. Reference Providers serve at will and are free to accept or decline opportunities to participate each month.

After all candidates are confirmed for a month's session, Reference Providers are assigned in pairs to each candidate. All efforts are made to limit the number of Candidate references to four, as more than four references in a day creates a significant burden on an individual Reference Provider volunteer. When possible, Reference Providers with experience in the Candidate's domain are assigned.

Candidates

Candidates are recruited at the Section level, and at the Region level via E-Notice. Care is taken to only contact members with "OK to contact." See the process document "IEEE R3 SSC SMEC - Communications Plan" for details.

Interested candidates are asked to supply a detailed resume that conforms to the Senior Membership template, which identifies employment months and years, experience reflecting professional maturity, significant accomplishments over at least five years in professional practice, and education start and completion dates. Resumes are reviewed and workshopped before acceptance to ensure a consistent and complete document. Candidate resumes are stored in an IEEE-managed Google shared drive with access controls limited to the Senior Member advancement team.

In cases where a candidate does not have a resume, frequently due to a long period of retirement for a Life Member, or in cases where a candidate cannot attend the live interview, the Edge Case process is initiated. The Edge Case team will conduct a detailed, one-hour personal interview at the candidate's convenience and craft the required documentation for the nomination from the interview.

After elevation to Senior Member, candidates are offered the opportunity to provide references for future candidates and become eligible for other opportunities for new Senior Members, including the Student Interviews Project and expert speaking opportunities.

Scheduling

When a date is decided for a Roundup event, a 4-hour calendar placeholder is created. As candidates and Reference Providers are made available for the event, they are added to the placeholder invitation. A week before the event, the placeholder is refined to a 30-minute orientation invitations for each person. The IEEE Google Apps calendar is used for this purpose.

Candidates and Reference Providers are sorted into groupings, where each group consists of a unique set of Reference Providers, two per candidate. The size of a group is determined by the number of Reference Providers, and Reference Providers will be scheduled for subsequent groups depending on how many references they are providing. For example, in the chart below, in group 1, candidates A and B will be interviewed simultaneously in the first time slot by the assigned Reference Providers. Then in the next time slot, candidates C and D will be interviewed, and the Reference Providers will move forward from the previous slot. It's important to note that Reference Providers should not be asked to conduct more than four interviews. In this example, Reference Provider N does two references, but P only does one and is replaced by Q in the pattern for the next group. This scheduling is non-trivial at larger scale.

| Group | Candidate | Reference 1 | Reference 2 |
|-------|-----------|-------------|-------------|
| 1 | A | M | N |
| 1 | B | O | P |
| 2 | C | M | N |
| 2 | D | O | Q |

Every effort will be made to contact candidates who do not show up for their scheduled time. Candidates who are not able to make the scheduled time are strongly requested to contact the planning committee in advance, or as soon as possible after the event. Candidates may request to be rescheduled to the next event or, in special circumstances, they may request to be included in the Edge Case process for an out of cycle interview. Nominators will remove the Reference Provider assignments for rescheduled or absent candidates from the Senior Member portal, to prevent the Reference Provider from receiving on-going reminders to complete the reference.

Assignments and Nominations

After candidates are identified and Reference Providers are assigned, the nomination team completes nominations in the IEEE Senior Member portal. The nomination team is currently limited to a small group of experienced people and Section officers. Nominations are done completely through a resume review, and nominators will contact candidates via email as needed to request clarification or more detail. Nominators assign the designated Reference Providers in the nomination package at the IEEE Senior Member Portal, which generates an email notification from the system to the Reference Provider. Reference Providers are asked to defer completion of the reference until after the interview.

Resumes are available to Reference Providers through the reference request link but are also provided in advance via access to the Google shared drive. Access is controlled and limited to the Senior Member team and the specifically assigned Reference Provider view. Reference providers are requested to review the resume in advance and then advised to open the portal link during the interview and complete the reference during the interview whenever possible.

Conduct Interviews

During the interview, reference providers view the candidate's resume and have the application ready to be filled. Reference providers are suggested to look for significant accomplishments and discuss them with the candidate throughout the interview. Examples of such accomplishments would be impacts on individuals and groups of people, leading large projects, mentoring young engineers, etc. Examples and further details can be found at <https://www.ieee.org/membership/senior/senior-requirements.html>

Guidance on the content of the endorsement is to limit the length of the endorsement to no more than two paragraphs, and specifically note career highlights and the personal conversation held. This endorsement should clearly state the evidence of the 10-year experience requirement and evidence of the 5 years of significant achievement, to help the A&A panel reviewers to identify these requirements easily.

Reference Providers are instructed to answer "yes" to the question if they know the candidate personally since they have had a personal conversation with the candidate.

If a Reference Provider feels that a candidate does not meet the requirements for Senior Membership, they are asked to stop, do not complete the reference, contact the Senior Membership Coordinator, and schedule a meeting to discuss concerns. Candidates will be rescheduled for the following event if appropriate, or they will be advised by SMEC leadership

of the decision to not advance their nomination through the SMEC process, with specific details and recommendations to re-apply successfully.

In cases where a Reference Provider does not complete the endorsement during the interview and then does not complete it before the ten days prior A&A Review Panel deadline, the nominator will initiate a call for help, and an alternate Reference Provider will be identified. The alternate reference will be resume review only. This requires the nominator to delete the original Reference Provider in the application and re-assign the emergency Reference Provider. The nominator is responsible for providing this oversight to all candidates for whom they provided nominations.

Candidates who are not able to attend the interview event and who request it will be rescheduled to the following event. Candidates who are unable to attend the event due to personal schedule or physical limitation may request to be considered as part of the Edge Case process.

Edge Cases

Edge Cases are handled as one-off interviews, scheduled out of cycle, and may include individual telephone calls, video calls, in-person meetings, or whatever method is appropriate to enable the candidate to receive a completed nomination package. A special team of Reference Providers, many of whom are themselves unable to meet on regular Saturdays, are assigned to Edge Cases.

Rejections and Resume Recovery

In the event a candidate is deferred or denied by the A&A panel, the SMEC convenes the Resume Recovery team. The candidate's resume is re-reviewed in the context of A&A comments and recommendations for changes are made. If the team determines that a candidate is lacking experience requirements, the team will recommend the candidate re-apply in a time period that will meet the requirement. If the deficiency is in significant performance, the team will make specific and actionable recommendations for the candidate to update the resume to meet the requirement clearly, and the candidate will be re-submitted by the team for the next A&A cycle.

Technologies

The process makes use of the following technologies:

- Vtools: All attendees, nominators, Reference Providers, candidates, and observers, are requested to pre-register for the event in Vtools. After the event, the Vtools report is filed for the section. All sections who provide nominators for their candidates are added as co-hosts. Note that Vtools is not used for coordination of the schedule or the resume. [IEEE MGA vTools – Providing tools to the volunteers and staff who support our members](#)
- OU Analytics: Membership list access for eligibility of candidates and senior members. <https://mga.ieee.org/resources-operations/volunteer-tools/samiee>
- Member validator: Used to pre-validate all member numbers for nominators, Reference Providers, and candidates. Any discrepancies are brought to the member immediately for resolution before the member is scheduled in the process. <https://services20.ieee.org/membership-validator.html>
- Senior Member portal: Where nominations are submitted and tracked, and references are provided. IEEE Senior Membership page: <https://www.ieee.org/membership/senior/>
- Zoom professional account: The team uses Zoom due to the common nature of the platform and the easy ability to manage breakout room assignments. WebEx is also an acceptable tool and may be requested through IEEE.
- Google Apps: The full Google tool suite is available and provisioned by IEEE through a volunteer ieee.org email account setup. The team uses Google Drive, Sheets, and Calendar extensively.
- Collabratec: The R3 Senior Membership networking community. <https://ieee-collabratec.ieee.org/app/workspaces/7789/R3-FWCS-Senior-Roundup-Networking/activities>
- Web presence: All documentation for the SMEC program is stored in the R3 Section Support Committee Knowledgebase
- Linked In: The SMEC has a Linked In page for advertising, awareness, and coordination. <https://www.linkedin.com/company/ieee-region-3-senior-membership/>

Personally Identifiable Information (PII) plan

Data elements that IEEE considers to be PII are collected as a part of this process. Access to this data is controlled by specific permission settings on files. Only Senior Member process administrators have access to the Reference Provider roster and candidate resumes. Reference providers and nominators are given access only to the resumes of the candidates they are endorsing. Resumes are retained only for the time required to ensure their nominations are accepted, and deleted afterwards. Nominators are given access to the master scheduling tracker. All access is controlled as need-to-know on IEEE-provisioned systems.

Other cadence meetings

As Reference Providers are assigned each month, an option is offered for detailed Reference Provider training. This training consists of an overview of the purpose and process and a walk-through of the tools and expectations for writing endorsements. This training is only held if Reference Providers need it, and it is typically not needed more than once.

Orientations for candidates and Reference Providers are conducted just before the first group of interviews on an interview day. These orientations consist of a welcome, an overview of the purpose and process, and a description of how the day will progress. This is an important opportunity for questions and for technology and communications checks.

Planning and strategy meetings are regularly held, typically in the morning of an interview day. These sessions are opportunities to discuss the interview roster, identify any problems or deficiencies, gain help from others, and plan for future activities.

Personnel

The SMEC process team currently consists of the following roles:

- R3 coordinator
- Resume team
- Collabratec team
- Sections outreach
- Communications
- Nominators coordinator
- Reference provider coordinator
- Candidate recruiting
- Edge-case team
- Senior Members engagement
- Student interviews
- Meeting and vtools
- Documentation and training
- Web / Knowledgebase
- Candidate rejections recovery team

Documentation

The SMEC process documentation is located at the R3 Section Support Committee Knowledgebase. Managed documents include:

- IEEE R3 SSC SMEC - Process Guide - August 2023
- IEEE R3 SSC SMEC - How to Build the Section Engagement Data Tool - April 2023
- IEEE R3 SSC SMEC - Communications Plan - August 2023
- IEEE R3 SSC SMEC - Execution Plan - August 2023
- IEEE R3 SSC SMEC - Guidance for Nominators and Reference Providers - August 2023
- IEEE R3 SSC SMEC - Senior Member Resume Template - 2023 -
FirstName_LastName_IEEE#12345678
- IEEE R3 SSC SMEC - 2023 Participant Guide - August 2023
- Sections Training (Under construction)