

IEEE/ComSoc/NAR DLT/DS Program

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NAR Chapter Chairs Meeting

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My Background:

Ph.D. (EE)

LSM-IEEE, Assoc Fellow- AIAA, Fellow-ISA, Distinguished TM

- Current: Adjunct Engineering Faculty, University of Houston Clear Lake:
(Interest in Communication, , Control, and Energy)
- Retired from Space Program- Space Station, Space Shuttle, Apollo

Service to Societies:

- (current) Section treasurer, PACE chair, ComSoc chair, Joint Chapter chair, Education chair, Consulting Group chair,
- (past) Section chair/Vice chair, R5 RSAC, R5 Chapter Chair, R5 Training/Education chair, R5 Annual conference General Chair
- (past) IEEE/EMBS Ethics chair, IEEE/AESS Board Member, International Director, Assoc. V/P membership, AESS Chapter Chair
- Other Organizations- Secretary Clear Lake Council, Chair AIAA A&R TC, Scientific Secretary IMEKO TC-17, V/P Automation and Technology ISA

Outline

- DDLT/DSP Charter
- Program Grants
- ComSoc P&P Section 7.2.6.3
- **RESOURCES!!!**
- 2016 Accomplishments
- **STEPS IN ORGANIZING DLT/DSP!!!**
- **Your Questions??**

DLT/DS Charter

- To support ComSoc chapters and IEEE sections with grants for organizing lecture tours and individual speakers' engagements.
- ComSoc P&P Section 7.2.6.3 (a, b, c) provides details on the arrangement, grant monies and procedures

WHY DLT/DSP

- Specialized Topics delivered by ComSoc selected distinguished speakers
- Key expertise in new and cutting edge technology
- Provides needed focus to chapters and sections on specialized areas
- Inexpensive event- nominal expense by section/chapter with society grant supporting speakers travel

DLT and DSP Programs

ComSoc provides grants for two programs to all regions-

- DLT- Distinguished Lecture Tour- multiple presentations (min 3) to sections/chapters by the speaker during each tour itinerary (grant based on travel location). Grant limited to \$1000 (\$3000 for out of country engagement)
- DSP- Distinguished speaker presentation to a section/chapter (grant limited to \$500). Also travelling member's presentations with no cost to ComSoc, coordinated with DLT/DSP coordinator counts as DSP.

Local transportation and Food/lodging responsibility of local host section/chapter.

[Valid only when pre-approved by the society DL Coordinator]

Distinguished Lecture Tour: (Refer to COMSOC P&P):

“The objective of the project grant is to make sure the speaker's travel is covered from his/her place of residence to the city of presentation and return back to his place of residence. Local expenses during the scheduled presentation date is the responsibility of the host groups. Expenses for any personal visits or stays other than that needed for the scheduled presentation are not covered by the grant. It is important that the request for the DL event is made after enough home work is done on the details of the projected schedule and expenses.”

Resources?

1- List of Speakers

<http://www.comsoc.org/about/memberprograms/distinguished-lecturers>

<http://www.comsoc.org/form/2017-distinguished-lecturer-nomination-form>

- URL Provides names and topics of society distinguished speakers.
- Additional List

[DL-ComSoc-List \(version 2\).xlsb](#)

[Additional-Bios-Topics.docx](#)

2- [DL grant/tour application](#)

3- History of Speaker's engagement

[DL TOURS \(3\).xlsx](#)

- [out of 43, terms of 22 end this month. For the remaining available for invite in 2017 are 10 from region 1-7

4- NAR chapters chairs can work in organizing tours (need update for 2017)

[NAB chapter Officer Info 11 Feb v2.xlsx](#)

2016 NAR DLT/DSP Accomplishment

- DLT 6
- DSP 10 (2 no cost to ComSoc)

[2016 accomplishments](#)

STEPS in organizing DLT

- 1- Chapter chair or regional ComSoc Rep (Champion), reviews the list of all the speakers that have been compiled along with their geographical locations and their presentation topics.
- 2- He/she tentatively selects a speaker (not too far from the location of the chapters where presentations are planned, and considering the airline costs) and his/her topic and contacts him/her for his/her availability dates.
- 3- Having received tentative dates, contacts/negotiates dates/time for speaker's presentations at the expected chapter locations.
- 4- Champion googles most inexpensive flight costs (IEEE rules), confirms each chapter's financial responsibility, date/time of presentations at their locations..
- 5- Champion prepares financial/program details, fills out request form and submits to Carol for approval by NAR DL coordinator, NAR Director, and Zhensheng Zhang,- in that order. NAR DL coordinator assures that the amounts are reasonable. Any deviation from the recommended amount or lack of complete information is sent back to the champion for clarification before final approval.
- 6- Carol advises approval of the DLT to the initiator after the above approval is complete. This needs to be done 22 days to 4 weeks in advance of the start of the planned tour so that cheaper flight tickets were still available. Initiator confirms with the speaker to book the flights and host chapters to make their local arrangements and then follows through the scheduled program.
- 7- After the tour, Speaker submits report on his/her trip, with dates/locations of chapters, including the number of attendance and any other details that may help the DL program, along with the expense bills with receipts. Both Carol and NAR DL Coordinator are copied. Speaker is reimbursed for the incurred expenses only, even if the approved amount was higher.
- [Note- NAR DLT Coordinator recommends that if a speaker is available locally in the region (or NAR) who can present the desired topic, we should discourage inviting another speaker from other continent or far away. This will save our funds for additional DL tours.]

DLT/DSP Issue: NEED Chapters Engagement

Need for engaging Distinguished speakers by chapters/sections [FUNDS ARE UNDER-UTILIZED]

- Speakers 2015-2016 term
 - 2015 9 had no engagement
 - 3 had 2 tours
 - 6 had 1 tour
 - 2016 7 had no engagements

[5 speakers were not invited during their 2 years DL term]
- Speakers ending term 2017 - 21 speakers available for DLT/DSP
- [NA Tours.xlsx](#)

Comments needing answers

- 1- Speakers tend to be too academic
- 2- How to get speakers with broader appeals and align with ComSocs 5 initiatives
- 3- DLs are skimming my chapter- serving only big chapters
- 4- Need more DLTs
- 5- Need more lead time in order to get sponsors to share costs

7.2.6.3 Distinguished Lecturer/Speaker Program

Provided as a service to our local chapters, Distinguished Lecturer Tours and individual Distinguished Speaker events may be arranged in response to a request from one or more Chapter Chairs. They may also be initiated by Regional Directors, the Director – Member Services, or the VP-MGA. Although tours and individual lectures are organized to benefit existing members and Chapters, they may also be effective in generating membership and encouraging new chapter formation.

Lecture tours shall be supported as the budget allows in each of our four Regions: Asia/Pacific, Europe- Africa-Middle-East, Latin America, and North America. The Director in each region plays a key role as facilitator. No more than two tours should be allowed per year to each Distinguished Lecturer. Funding shall be in accordance with the following guidelines

7.2.6.3.a Distinguished Lecturer Tour (DLT) Program - Procedures

Funding (up to approximately \$3000) for DISTINGUISHED LECTURER TOURS (DLT) shall be provided to enable a lecturer to address multiple groups during a lecture tour. Normally, no more than \$1,000 shall be approved for chapters when they organize a DLT and choose a lecturer from the same region. However, ComSoc shall approve an additional allocation (minimal) on a case-by-case basis.

For those chapters that organize DLTs and select lecturers from “other” ComSoc regions (requiring international travel), ComSoc shall approve up to approximately \$3000 per tour. No more than two or three tours of this type should be approved per Region (for example, NA region may invite 2-3 DLs from other regions. LA region may invite 2-3 DLs from other regions, etc.). ComSoc shall be flexible for this type of (international) DLT to enhance our Globalization efforts. DLTs organized using “In-Region” lecturers should continue to be supported as budget allows.

DLT Tours involve a series of lectures – addressing at least three groups in three separate locations within reasonable geographical proximity to each other.

“Grassroots” organizers may be Chapters, Sections, local conference organizers, or even a group of members in an area where no ComSoc chapter exists. Organizers work directly with their Regional Director, who facilitates arrangements and recommends the tour to the Director - Member Services. Tour recommendations should take place at least two months before the tour begins and must include the following:

- Chapters involved in the tour
- Chapter Chairs and e-mail addresses
- If a university is involved, name of school, contact, and e-mail
- Name and e-mail address of Lecturer
- Dates of each lecture
- Location of each lecture
- Estimated cost of lecturer’s air fare

- For chapters desiring to host an individual lecture, the chairs may work directly with their Regional Director and DLT Coordinator. Regional Directors and DLT Coordinators shall be proactive in engaging the more passive or inactive chapters in DLT activities to help the chapters attract more members.
 - • The decision to approve a DLT request is the responsibility of the Director - Member Services with his/her final approval being announced with as much advance notice as possible (preferably two months prior to the tour)
 - • DLT budget change after the final approval. Please keep in mind that our DLT budget is very limited. The estimated budget for an approved DLT has been allocated from the ComSoc budget. If it appears that some estimated costs will be exceeded, it is imperative that you contact the DLT Coordinator prior to incurring those increased costs as additional approvals must be requested. Additionally, those Chapters participating in the DLT should consider that participation as a commitment since the approved DLT is based on said commitment.
 - • All arrangements must be made in advance with the local sponsoring groups. The two-month “lead time” is recommended to allow time to obtain visas if necessary, time to advertise, etc.
 - • As part of the overall program, all lecturers must record their lecture after the tour for the Online Distinguished Lecturers Program. To that end, someone in the ComSoc IT Department shall contact the lecturer regarding recording his/her lecture as a Webinar and the ComSoc Marketing Department shall contact the lecturer about promoting the tour on social media and Facebook pages.
 - • Funding for a tour is provided, as normally required, to cover a lecturer’s travel expenses. Living expenses, such as lodging and meals, plus transportation to and from the airport, are generally the responsibility of the local chapter. Travel, lodging and meals must be booked at an economic rate acceptable for reasonable business travel. (Funding may include night before/after each lecture as required by the schedule to accommodate needs of local organizers.)
- After recording the lecture for the Online Distinguished Lecturers Program, expenses are then submitted to ComSoc Staff on an IEEE Expense form and approved by the Director - Member Services. Receipts must be provided (in accordance with IEEE and Communications Society rules). The lecturer must not profit financially from the lecture tour. The IEEE Expense form is found at the Distinguished Lecturer web site:

www.comsoc.org/about/memberprograms/distinguished-lecturers

7.2.6.3.b Distinguished Lecturers Tour (DLT) Organization

Recommendations for organizing a DLT for local chapter chairs and Distinguished Lecturers:

- First contact the Regional Director or DLT Coordinator responsible for your region: Asia/Pacific, Europe, Middle-East & Africa, Latin America, or North America.
- Organize the DLT around a pre-defined need or around the availability of a lecturer in a geographic region.
- Working with your Regional Director and DLT Coordinator, establish interested local contacts in at least three locations (via IEEE contacts, conference organizers, Chapter Chairs or other contacts if possible) before proceeding to the detailed level of organization or firming up lecturer.
- Give local organizers and the lecturer about two months' notice to arrange the tour. Verify that the logistics are feasible – such as ensuring that it is possible to book connecting travel between sites in the time allowed, etc.
- Schedule talk sites in a geographic pattern that minimizes travel expenses.
- Ask the DLT Coordinator or each local contact to ensure that the following items are addressed to the satisfaction of the lecturer:
 - o return transport from airport to lecture site/hotel
 - o hotel recommendations where required
 - o arranging additional local contacts or meetings for the lecturer
 - o providing appropriate tourist information, if lecturer has some spare time
- Brief the lecturer on local details, such as whether organizers are Chapters, a Student Branch, interested group of members (who could be encouraged to form a chapter), or local professionals (who should be encouraged to join the Communications Society). Use the lecturer as an ambassador to encourage membership - using his/her own style.

- **7.2.6.3.c Distinguished Speaker Program (DSP) – Procedures**

This program involves a Distinguished Speaker already visiting the region and a single day event (lecture/seminar, etc.) organized by a chapter for the members of the chapter.

- • A Distinguished Speaker (DS) may be a current or former Distinguished Lecturer, an IEEE Fellow, or a well-known person from industry and/or academia who is not a current or former DL. All Distinguished Speakers (DS) must be approved by the Director-Member Services before the event.
- • A Distinguished Speaker Program (DSP) event is supported by up to a maximum amount of \$500.00, which includes the following local expenses only: lodging, meals, transportation, publicity, A/V, copying, etc. All local expense from a DSP shall occur in the same city of the event. Exceptions (such as a train ticket from another city to the event city) shall be approved by the Director-Member Services.
- • Before the event, the local chapter identifies a DS (or the DS contacts a local chapter). Then the local chapter contacts the Regional DLT/DSP Coordinator, who, together with the local chapter, works out the details of the event and the expenses. The Regional Director should be in the loop as well. The DLT/DSP Coordinator contacts the Director-Member Services for final approval.
- • After the event, the DS shall submit a written event report to ComSoc, which shall be posted on the ComSoc web site. Then the DS sends his/her expense report to ComSoc for reimbursement (all local expense reimbursements shall be submitted by the DS, not the local chapter). Finally, after the event, the local chapter shall evaluate the speaker and provide feedback to the DLT/DSP coordinator and the Director-Member Services.