AESS

Short Course Initiative

(Draft for Consultation)

Prepared by the AESS short course committee:

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1 Background

The Short Course Initiative was conceived back in May 2015 by then VP Education, Joe Fabrizio. It was presented to the AESS Board of Governors as a new initiative. His thought was that Chapters had no mechanism to raise revenue to benefit members. He was convinced that Chapters could raise funds by empowering members to offer fee-paying AESS short courses. He ran a pilot program in November of 2015 by giving a one-day workshop himself, drawing in many participants and proved his idea as successful, raising around $10,000 for the local chapter. The South Australia Chapter ran a second "pilot" in 2017, bringing AESS Distinguished Lecturer, Lorenzo Lo Monte in to give a multi-day course, with equal success. The idea gained the support of the AESS Board of Governors, and a committee was put together (Lorenzo Lo Monte, Luke Rosenberg, Jason Williams) to create this document as a resource for all AESS Chapters.

2 Motivation

The activities of many local AESS Chapters are often constrained by insufficient revenue, and they do not have an effective mechanism to improve this. The AESS has an excellent core of mature members willing to contribute to educational activities. By empowering members to offer fee-paying AESS short courses, chapters can raise funds and better engage with the local community. These courses can be offered to industry, Government, and academia that have training budgets for staff professional development.

This Short Course Initiative will require input from both the AESS Industry Relations and Education Committees, who can work with the local chapters to help identify training needs. The Technical Panels Committee and the Education Committee can then help identify course presenters in the AESS Fields of Interest. The Membership Committee and Chapters will organize the course and local arrangements.

This initiative has been proven twice with pilot programs run by the AESS South Australian Chapter. The success was astounding, and now the process will be shared and developed with the rest of the AESS Chapters.

Short Courses can provide the following benefits:

- **Training:** Many IEEE members are more interested in tutorials or short courses, rather than a single lecture. This is because IEEE members are typically engineers, students, or researchers who prefer to spend a block of time developing skills as part of a training course. Also, local industry is more willing to pay to send their employees for training/tutorial classes rather than a single lecture.

- **Income for Chapters:** Chapters that are willing to host a Short Course, provide local support, manage logistics, manage attendees, etc. will be able to raise some revenue for future IEEE activities.

- **Serving the society membership:** The Short Course Initiative will bring together many areas in the society: Membership, Education, Technical Panels, and Industry.

3 Execution

3.1 Organizer

Within the role of providing technical activities to the local IEEE community, the organizer should be an AESS Chapter Chair of a local section. This Chapter Chair may request support of a team of local members to carry out the various tasks detailed in the guidance. The AESS is also available to support the Chapter Chair.

However, any IEEE AESS member can start the process of organizing a short course. In this case, the organizer shall contact the local AESS Chapter Chair, letting them know of the intent of hosting a short course. The initiator must have the support of the local AESS before beginning the process. If your local Section does not have an AESS Chapter, please contact the AESS Executive Assistant directly at admin@ieee-aess.org, for assistance.

3.2 Determine Need

The first objective is to find a topic of interest which will attract a reasonable audience. This will require the organizer to determine the needs of the local industry, universities, and any Government laboratories. Having a list of potential topics in advance will be helpful. Currently, the AESS website has a list of DLs who may be prepared to offer short courses. As more courses are confirmed, the AESS website will be updated.

Some ideas to help with this process:

- Ask your contacts and colleagues what areas for which they would like training.

- Try to get the interest and support of large research institutions or companies, who will commit to sending their employees for a fee.

- Create a survey. This can be achieved simply via email, or of the number of colleagues is large, then free services such as surveymonkey.com or Google Forms. To reach the local IEEE audience, contact your local Section Chair or Secretary and have them send a vTools eNotice to all local members with the survey that you have prepared

- Contact the AESS Industry Relations and/or Education Committees for their advice. Their details are provided on the short course web page.

3.3 Find a Speaker and Date

Once the topic has been decided, the next step is to find a suitable speaker. This may include asking the local industry, contacting the respective AESS Technical Panel and/or the AESS Education Committee. The short course speaker must be approved and listed on the AESS website. If you wish to invite a different speaker, this person must be cleared first by the AESS Short Course Committee. Further details on this are given below.

The next step is to clarify details of the topics to be presented and the duration and dates of the course. Due to the cost of overseas travel, in most cases only a single speaker should be contacted per event.

3.4 Plan Venue

Next, an appropriate venue must be found. This process can be simplified by contacting the local IEEE Section who may know some suitable and accessible locations. If no venue is immediately found, ask your local universities, industry, and libraries. It might also be useful to engage the local IEEE Section Treasurer who could assist with the financial aspects of the short course, including payments to caterers, vendors, etc.

It's highly encouraged that these rooms are available at low or no cost and contain:

- Seats and tables

- A projector and screen

- Lectern

- Means of recording audio and video the course (external camera, slide capturing software.)

The venue should be a place that:

- Hosts between 10 and 50 attendees

- Relatively close to local industry and universities

- Has access to public transport and/or car parking

- Unrestricted access for attendees

- Easily accessible for catering

The AESS would like all short courses to be recorded and posted to the AESS Resource Center. Therefore, the venue must have the capability of recording the presentation and/or the slides and recording should be utilized when financially feasible.   Please click here for information on Recording a Video Tutorial for the AESS.

3.5 Budget

The goal is to keep the cost of these courses as low as possible to attract a larger audience and promote the IEEE. In addition, the advantage of the short course is that the local AESS Chapter can earn money which can be used for future activities.

The instructor should be offered an appropriate honorarium for the course and is entitled to a full reimbursement of the travel expenses. If necessary, the AESS can provide seed money of up to

USD $2,500 in advance of the course, with the expectation that it will be paid back after the event. The remaining surplus will be split 80/20 between the local Chapter and AESS.

The speaker is expected to book economy travel and stay at a hotel within walking distance to the venue (if possible), to save costs. For further information, see the IEEE Travel Guidelines.

The price should be set based on an estimate of total expenses against the expected number of attendees. A spreadsheet has been provided to help determine the average course cost. Pricing should be in four tiers:

- IEEE Members

- Non-IEEE Members

- IEEE Student Member

- Non-IEEE Student member

    Please see an Example Budget here.

The organizer shall be cognizant that there could be financial losses in case the planned AESS Short Course has poor attendance. As such, the organizer shall make plans to avoid the risk of financial loss and disclose such plans to the Short Course committee. Some suggestions are listed below:

- Set an early bird payment date to attract early registrations.
- There needs to be a notification in the advertising that this decision may be made immediately after the registration deadline, at least 30 days in advance, in the event of insufficient registrations and that we have a provision for refunding the registration fees received. There needs to be no other penalty payable to the prospective attendees apart from this.
- The instructor needs to be made aware of this possibility from the outset and as part of the condition of engagement.
- The AESS needs to view the final budget after the registration deadline to approve the decision to proceed or not, especially if seed money is provided.
- Chapter chairs should minimize the commitment of funds until this decision is made.
- Chapter chairs should be encouraged to book venues where the cancellation fee by the registration deadline is small or zero, if possible. This requires planning well ahead of time. Similarly, if flights need to be purchased before this decision, it is essential travel insurance be purchased which allows cancellation.
- All other expenses should only be triggered after the course has financial approval to proceed and is hence guaranteed to make money.

These Short Courses have been proven to generate healthy surpluses for the Chapters. It is advised to begin thinking of ways to use the surplus that will provide benefits to members. It is important to ask ourselves what type of activities would be most valued by our members that would support member engagement, retention, and development. Consider member

demographics by career stage, affiliation category, geographic region, and gender and try to identify what these different groups of members value most. Examples may include:

- Student and younger members would need to be targeted as a large percentage cease membership after one or two years. Students and younger members value job opportunities and career progression. How could any surplus be used to support these members?
- Invited speakers from industry
- Industry Days
- Networking Event
- Student Competitions
- Awards
- Travel grants for students

3.6 Registration

The event should be organized using vTools Events, a free service offered by IEEE to all its members. vTools should be the preferred method because:

- It can handle credit card* payments and link to the local section or chapter concentration bank account. It is suggested that the Chapter set up a separate concentration banking account, separate from the Section account.

- Click here for instructions on setting this up.

- It is automatically connected to the IEEE reporting tools so that the L31 can be submitted with just a click.

- It is supported by the IEEE.

*Note: At this time, vTools Payment is still being developed for countries outside the US and Canada. An update will be provided as the payment method is formalized.

3.7 Create Advertising Brochure

A flyer is recommended to advertise the event. The flyer should include:

- Abstract, bio and picture of the instructor

- Time and Place

- Course cost

- Link to register online and if desired a QR code.

- IEEE and AESS logos

- Details of the local point of contact.

See examples of the Advertising Flyer here. (Publisher File)

3.8 Advertising

There are several options to advertise the event.

- Email blast the advertising flyers to all AESS members in the local section and any nearby sections who might realistically attend. This can be done by contacting the local Section Officers or through the AESS Executive Assistant at admin@ieee-aess.org who can send the email blast on your behalf.

    o To reach the local IEEE audience, Section Officers can use the eNotice service from vTools. This is an approved and recommended method of disseminating IEEE-related news and events to the local members who opted for receiving IEEE emails.

- Post it on the local and neighboring IEEE section websites.

- Forward the advertising flyers to colleagues and people that you know, in particular working at different companies.

- Disseminate flyers to local universities.

3.9 Catering

Catering must be organized for the event and should include tea, coffee and water throughout the day, food at both morning and afternoon breaks and a suitable lunch.

4 AESS Short-Course Instructor

Individuals wishing to become an AESS Short Course instructor must first contact the AESS for approval. The AESS Short Course Committee will determine the credentials of the instructor and the relevance of the proposed course. The instructor shall:

- Be approved by the AESS Short Course Committee

- Provide a list of topics

- Agree to perform this lecture as a volunteer or with an agreed upon honorarium

- Be prepared to travel internationally.

Short courses can range from half a day to a full week. The slides will remain intellectual property of the instructor, but slides and/or notes should be disseminated to course attendees. Presenters are also encouraged to permit recording of tutorials for inclusion in the AESS Resource Center. In this case, a signed Copyright Form will be necessary.

Please be advised that, regardless of the credentials of the instructor, not all topics will be accepted as a Short Course. The topics must be relevant and of interest to an audience that is

willing to pay a fee and attend the lecture for, possibly, even several days. These guidelines will be used to determine the acceptance of a proposed topic in the AESS Short Course list.

- The course should be not too technical, specific or theoretical, unless the targeted audience is aware of the topic.
- The course should not be too generic, such as an undergraduate/graduate class, unless the targeted audience is aware of the topic.
- The short course should have an history of past editions, possibly showing the number of attendees and the average fee.
- In case the short course has never been presented by the instructor, the applicant should demonstrate that a similar course, presented by other peers, has repeatedly been shown to be successful.
- For a completely original topic, the applicant shall demonstrate with evidence and, possibly, letters of support, that the topic is of interest to the targeted audience.

It is encouraged that the instructor considers courses that span multiple days and/or multiple locations within the same region.