 

**AESS**

**Short Course Program**

**July 2022 Update**

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# Background

The AESS Short Course Program has been running since 2017 as a means of providing training to our members, earning income for the local chapters, and to serve the local membership. While the desire is for short courses to be in-person and open to all members, they may be run virtually or exclusively to a specific company. To date, short courses have been run on four different continents, with a mixture of openly run in-person, virtual and exclusive offerings.

The Short Course Program 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. Joe then ran a pilot one-day course in November of 2015, which was successful in drawing in many participants and raised around $10,000 for the local chapter. The South Australia Chapter then 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 a Short Course Program Guide as a resource for all AESS Chapters.

During Covid, the Short Course program was less active, and Mark Davis agreed to trial a virtual Short Course. While this ran successfully and proved a viable method of giving short courses, there was less interaction than an in-person course. Another model that has proven successful is for an individual company to request the Short Course be given exclusively to them. This allows for the course to be customised to the company and better matches their training needs.

# 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.

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.

# Course Options

Apart from the traditional openly run in-person short courses, there are also options to run them either virtually or exclusively.

Virtual courses offer a useful alternative in the case that the local chapter cannot afford to pay for travel or if travel is not possible. In this case, a platform like Webex, Zoom or Teams should be used to allow interaction with the presenter and recording of the sessions. The time zone should also be carefully chosen to match both the presenter and audience. Shorter sessions may need to be run over a number of days. Note, that it is the consensus of the Short Course committee that virtual courses do not have the same level of interaction as in-person.

Another model that has proven successful is for an individual company to request the Short Course be given exclusively to them. This allows for the course to be customized to the company and better matches their training needs. In this case, the company needs to make contact with the local AESS chapter to help coordinate the event.

# Execution

## Organizer

Within the role of providing technical activities to the local IEEE community, the organizer should be an executive member of the local AESS chapter. The organizer 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 organizer.

If someone else is interested in running a short course (i.e. local company, university, Government laboratory), they should 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 Chapter before organizing a course. If your local Section does not have an AESS Chapter, please contact the AESS Executive Assistant directly at admin@ieee-aess.org, for assistance.

## 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 (https://ieee-aess.org/educational-activities/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.

## Find a Speaker and Date

Once the topic has been decided, the next step is to find a suitable speaker. The Short Course website should be the first port of call, but it may be that the desired topics is not available. In this case, we can use our professional networks to help source an appropriate speaker. Please reach out to the Short Course Chair, the respective AESS Technical Panel, and/or the AESS Education Committee Chair.

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.

## 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
* Is relatively close to local industry and universities
* Has access to public transport and/or car parking
* Has unrestricted access for attendees
* Is easily accessible for catering

The AESS would like short courses to be recorded and posted to the [AESS Resource Center](http://resourcecenter.aess.ieee.org/). Therefore, it is desirable that the venue 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](http://ieee-aess.org/sites/ieee-aess.org/files/documents/Preparing%20a%20Video%20Tutorial%20for%20AESS.PDF).

## 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 remains with the local Chapter.

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](http://ieee-aess.org/sites/ieee-aess.org/files/documents/T%26E%20Policy%2002.26.18.pdf).

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 (see an [Example Budget](http://ieee-aess.org/sites/ieee-aess.org/files/documents/Budget%20Template.xlsx) here):

* IEEE Members
* Non-IEEE Members
* IEEE Student Member
* Non-IEEE Student member

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

## Registration

The event should be organized using [vTools Events](https://events.vtools.ieee.org/), a free service offered by IEEE to all its members. vTools should be the preferred method because:

* In the USA, 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 banking account, separate from the Section account. [Click here](http://ieee-aess.org/sites/ieee-aess.org/files/documents/IEEE%20vTools%20set-up-payment-tutorial.pdf) 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.

For those outside the USA, an online payment and ticketing system such as EventBrite
(<https://www.eventbrite.com.au/>) is recommended. VTools should still be used for reporting and advertising.

## 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](http://ieee-aess.org/sites/ieee-aess.org/files/documents/Joe%20Fabrizio%20OTH%202015_alt_0.pdf) here. ([Publisher File](http://ieee-aess.org/sites/ieee-aess.org/files/documents/Joe%20Fabrizio%20OTH%202015_alt.pub))

## 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.
* 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.

## 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.

# AESS Short-Course Instructors

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.