Welcome!

Student Chapter Officer/HQ Meeting
September 15, 2022
1. Introductions: 2:00 – 2:05 pm (Amy Straub)
2. Membership Updates: 2:05 – 2:10 pm (Kathy Gamboa)
3. Officer Roles: 2:10 – 2:25 pm (Amy Straub)
5. Chapter Development Fund: 2:35 – 2:40 pm (Kaz Takeda)
6. Regional Conferences: 2:40 – 2:45 pm (Faisal Aqlan)
7. Student Chapter Training: 2:45 – 2:50 pm (James Swisher)
8. Wrap-Up/Questions: 2:50 – 3:00 pm (Kathy Gamboa, Amy Straub)
Membership Updates – 8/31/22

Total Membership:
- Professional Members: 8,375
- Student Members: 9,363
- Total Members: 17,738

Chapters:
- 51 Professional Chapters
- 250 Student Chapters

19 Regions:
- 12 International
- 7 US Domestic
Faculty Advisor

- The duties of the faculty advisor include:
  - To ensure that the chapter is operated in compliance with the IISE and Chapter's Constitution and Bylaws, as well as all IISE policies.
  - To ensure that students maintain an official IISE membership in order to participate in chapter events, speaking engagements and networking events. Being a member of an “IISE club” does not count as an official IISE membership.
  - To ensure that officers are elected each year, according to the Bylaws. The advisor should meet with the officers to discuss expectations for roles and responsibilities.
  - To ensure that chapter activities are inclusive for all members.
  - To guide the officers in planning chapter activities.
  - To encourage officers and other chapter members to be active in the chapter.
  - To serve as a professional role model.
  - To serve as liaison between the chapter, the department, IISE headquarters, the community of industrial engineers, neighboring schools and IISE chapters.

- Expectations:
  - Advisors must be a professional member of IISE.
  - Attend officers’ and chapter meetings/events.
  - Assist the chapter in identifying and seeking financial and program resources from the locale.
  - Attend the University Regional Conference with his/her student chapter.
  - Make every effort to attend the Faculty Advisor Colloquium held in conjunction with the annual conference. The faculty advisor meeting is designed to enhance the advisor’s effectiveness by providing opportunity to meet and network with other advisors.
  - The advisor should have a good knowledge of the university’s policies governing student clubs as well as the Institute’s chapter requirements. Ensure that the student leaders are also aware of the university’s policies.
President

Strategize
- Hold strategic planning meeting to determine chapter goals, objectives, and strategies.

Create
- Create (with input from Board) Annual Chapter Plan document and communicate to board, members, and Region Vice President (RVP).

Maintain
- Maintain ultimate responsibility for ensuring that all chapter requirements are met and that the chapter is operated according to the specifications of the IISE and chapter Constitution & By-laws.

Oversee
- Oversee and coordinate activities of all other officers, board members, committee chairs, etc.

Plan
- Plan and run monthly board meetings.

Establish
- Establish and oversee committees as necessary.

Develop
- Develop, assist, motivate, and recognize all other officers.

Coordinate
- Coordinate election of officers for next year.

Train
- Train President-elect, turn over all records and documents, and ensure smooth transition to next administration.

Attend
- Attend Leadership Training either in Region or at Annual Conference.
### Vice President or President-Elect

<table>
<thead>
<tr>
<th><strong>Assist</strong></th>
<th><strong>Compile</strong></th>
<th><strong>Purchase and present</strong></th>
<th><strong>Attend</strong></th>
<th><strong>Train</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Assist the President as required and assume his/her duties when necessary due to President’s absence.</td>
<td>• Compile information/documentation and prepare Chapter Performance Progress Report.</td>
<td>• Purchase and present gift to president at end of chapter year.</td>
<td>• Attend Leadership Training either in Region or at Annual Conference.</td>
<td>• Train new VP or President-Elect, turn over all records and documents, and ensure smooth transition to next administration.</td>
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Secretary

**Take**
- Take and distribute minutes for each board meeting.

**Keep**
- Keep officer slate up to date and forward to IISE Headquarters.

**Maintain**
- Maintain records of chapter correspondence and minutes and assist with chapter correspondence as required.

**Train**
- Train new Secretary, turn over all records and documents, and ensure smooth transition to next administration.
Treasurer

**Prepare**
Prepare (with input from board) annual budget and audit.

**Maintain**
Maintain chapter bank accounts and keep the books.

**Update**
Update budget monthly and prepare monthly account summaries for review at board meetings.

**Collect**
Collect money and issue receipts at all chapter functions.

**Deposit**
Deposit receipts and pay chapter bills in a timely fashion.

**Submit**
Submit annual tax forms (990-N).

**Train**
Train new Treasurer, turn over all records and documents, and ensure smooth transition to next administration.
Program Director

- Prepare (with Board and member input) a schedule of chapter programs for the year.
- Solicit volunteers for the Program Committee and oversee its activities, including:
  - Identifying, selecting, and handling all arrangements with speakers
  - Identifying, arranging, and coordinating logistics for plant and facility tours
  - Soliciting input from chapter members regarding potential topics
- Provide information about programs to the newsletter editor and other officers for publication/distribution in a timely manner
- Compile, analyze, and summarize monthly/annual Program Evaluations
- Provide information regarding speakers or plant tour hosts to chapter Secretary for thank you letters
- Provide summary write-up of programs for newsletter each month.
- Collect money and provide receipts if Treasurer is not present
- Collect monthly attendance data and report to Newsletter Editor for newsletter and to the VP for the CPP.
- Introduce speakers at monthly meetings and present thank you gifts
- Train new Program Director, turn over all records and documents, and ensure smooth transition to next administration.

Newsletter Editor

- Prepare (with Board input) an annual plan for the chapter newsletter, including editorial/column responsibilities, deadlines, advertising (if any), and budget
- Solicit, receive, organize, and edit articles and lay out newsletter, maintaining standards suggested by IIE Newsletter Competition Guidelines
- Ensure timely mailing/distribution (at least two weeks prior to monthly chapter programs)
- Coordinate electronic distribution and/or posting on home page (if applicable)
- Ensure newsletters are distributed to the IISE Headquarters, RVP, and Presidents of bordering chapters.
- Train new Newsletter Editor, turn over all records and documents, and ensure smooth transition to next administration.

Community Affairs Director — coordinates chapter/member involvement in community projects.

Business/Industry Outreach and Liaison Director — develops and maintains contacts in the local business community; serves as liaison/communication contact with local employers’ IE department heads and managers; ensures/facilitates communication about IE and about chapter events to key people in local companies.

Webmaster — maintains chapter web page, performs updates on a regular basis, coordinates content and appearance, post program schedule, meeting descriptions, and direction, inserts links to IIE Web site and sites of potential interest to members.

Career Services/Job Bank Director — maintains files of member resumes and/or job openings and helps publicize both; contacts companies to solicit job vacancy announcements; coordinates other career/job search-oriented activities such as seminars on networking, resume writing, etc., visits/programs by local executive search firms; point of contact for headhunters, employers, and job-seekers.

Marketing/Communications/Public Relations Director — promotes the profession, the Institute, and the chapter’s programs and services; maintains a list of press contacts for the local newspapers and deadlines for submission to the Sunday paper, etc., maintains contacts with local radio and television stations; regularly forwards information, press releases, etc.
Young Professionals Overview

**Vision Statement**
To be the premier organization that unites and accelerates the progress of young professionals globally as a catalyst to promote the industrial and systems engineering profession for the future.

**Mission Statement**
IISE Young Professionals (YP) is a group of global young professional members that aim to strengthen their relationship with the industrial and systems engineering body at large.

We create personal and professional growth opportunities including leadership development and network building. In addition, we support the transition to the professional community by integrating with the industrial and systems engineering society.
Young Professionals Overview
Amrika Ramjewan
Principal Strategist,
Mayo Clinic Innovation Exchange
President, IIESE Young Professionals

Karl Salvatore
Buyer II, Amazon Robotics
President-Elect
IIESE Young Professionals

Isaac Villarreal, PE
Senior Analyst, Customer Insights and Loyalty, American Airlines
Past-President,
IIESE Young Professionals

• Veronica Radin, Consultant, Operational Excellence at West Monroe Partners
  — Chicago Professional Chapter Vice-President

• Elizabeth Almquist, Portfolio Program Manager, FedEx Ground
  — IIESE Young Professionals Past-President

• Nathan Crabel, Manager, Operational Excellence at West Monroe Partners
  — Chicago Professional Chapter President, IIESE Young Professionals Past-President
Focus areas:
• Create personal and professional growth opportunities
• Leadership development and network building
• Support the transition to the professional community

Upcoming events:
• Q4 Virtual Town Hall (date TBD)
• Q1 ‘New Year, New Career’ webinar

Leadership opportunities:
• New positions coming soon on YP leadership team!

Interested in joining us? Let us know!
## Membership Rates

<table>
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<tr>
<th>Member Category</th>
<th>Cost</th>
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<tbody>
<tr>
<td>Students</td>
<td>$39</td>
</tr>
<tr>
<td>1\text{st} year graduate (current student members only)</td>
<td>$79</td>
</tr>
<tr>
<td>2\text{nd} year graduate (current 1\text{st} year graduates only)</td>
<td>$118</td>
</tr>
<tr>
<td>Professional Member</td>
<td>$169*</td>
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</table>

*May be lower if your employer participates in IISE corporate partnership program*
Membership Benefits

Membership provides access to:

- **Discounted first-year graduate membership** (with access to benefits of full professional membership)
- IISE magazine and Knowledge Center (incl. case studies, webinars, etc.)
- IISE Career Center, IISE Mentor Services, IISE Connect
- Networking and events (incl. conferences, seminars, awards, etc.)
- Professional development (incl. online training, PE prep, etc.)
- IISE YP leadership opportunities (incl. presidency roles, NAOB, IAB, etc.)
- IISE Chapter involvement and more!
- Podcasts
- Webinars (both live and archived)
- IISE Impact (monthly IISE newsletter)
- Member Discounts on the conferences, professional development/training etc. ,Membership perks, etc.
Chapter Development Fund (CDF)

Chapter Development Fund (CDF) is a resource from IISE to support chapter initiatives to increase membership and improve retention, created in 2008 in partnership with the Region Chapter model.

• What are the resources?
  – Up to $1000 (USD) for Professional Chapters and $500 (USD) for Student Chapters

• How many grants have been issued from the start in 2008 to 2022?
  – IISE has granted over $41K to 101 Chapters

• Have chapters denied funds?
  – Yes. Our committee takes this application process seriously and have approved nearly 70% of the applications.

• Who reviews the CDF applications?
  – First review is “suppose to be” with the Region VP for endorsement and suggestions
  – IISE HQ will conduct an administrative review to confirm that the key items are included and advise of any accuracy issues
  – The IISE CDF Committee will conduct a quarterly review of approved applications and recommend acceptance with grant dollars, deferment or decline
  – IISE HQ has the final approval but has always accepted the IISE CDF Committee recommendations

• Who is the CDF Committee?
  – Our committee is comprised of current or past RVP’s who have been approved by IISE HQ

• How do you apply?
  – Application is found on the IISE web site at http://www.IISEnet2.org/Details.aspx?id=633
Chapter Development Fund (CDF)
Application Process

Who may apply?
All chapters may apply, with priority given to red chapters. Red chapters must also submit all paperwork necessary for yellow/green status. Yellow chapters may also be favored to receive the grant, if the potential exists to move to green status. To determine the health status of a chapter, refer to:


under Community, IISE Chapter – Managing your Chapter, IISE Chapter Management. A chapter will not receive more than one grant per rolling calendar year or if a grant recipient has not submitted their after-action review. The Chapter Development Fund is open to both senior and student chapters and is considered a grant, so repayment is not required.

• Application
Chapter President must complete the Grant Application Form (word document). The application must contain information regarding contact information, current chapter membership size, treasury balance, primary goals of the proposal, market study, proposal plan/program description, date of event(s), total funds requested and a description of what activities the chapter has used to increase membership. Total funds requested should not exceed $1000 (USD) for Professional Chapters and $500 (USD) for Student Chapters.

• Program
Funding requests are to be used for activities meant to recruit new members and retain existing members. Funds are not to be used to fully subsidize membership fees or to support participation to Regional or National IISE conferences. Funds requested should be representative of the gains expected.
### 2022 Regional Conferences

<table>
<thead>
<tr>
<th>Region 13 – Mexico</th>
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<tbody>
<tr>
<td>Instituto Tecnológico de Aguascalientes</td>
</tr>
<tr>
<td>Student Chapter #723</td>
</tr>
<tr>
<td>Dates: November 16th, 17th and 18th</td>
</tr>
<tr>
<td>Contact: Gerardo Mejía Bernal</td>
</tr>
<tr>
<td><a href="mailto:garmando.mejia@gmail.com">garmando.mejia@gmail.com</a></td>
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### 2023 Regional Conferences

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<thead>
<tr>
<th>Region 1 – US Northeast</th>
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<tbody>
<tr>
<td>Binghamton University</td>
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<tr>
<td>Student Chapter #989</td>
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<tr>
<td>Dates: TBA</td>
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<tr>
<th>Region 2 – US Mid-Atlantic</th>
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<tbody>
<tr>
<td>North Carolina State University (NCSU)</td>
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<tr>
<td>Student Chapter #851</td>
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<td>Dates: TBA</td>
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<tr>
<th>Region 3 – US Southeast</th>
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<tbody>
<tr>
<td>University of Central Florida</td>
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<tr>
<td>Student Chapter # 811</td>
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<td>Dates: TBA</td>
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<tr>
<th>Region 4 – US Great Lakes</th>
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<tbody>
<tr>
<td>Ohio State University</td>
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<tr>
<td>Student Chapter #855</td>
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<td>Dates: TBA</td>
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<tr>
<th>Region 5 – US South Central</th>
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<tbody>
<tr>
<td>University of Missouri-Columbia</td>
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<tr>
<td>Student Chapter #836</td>
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<td>Dates: TBA</td>
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<tr>
<th>Region 6 – US North Central</th>
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<tbody>
<tr>
<td>South Dakota School of Mines &amp; Technology</td>
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<tr>
<td>Student Chapter # 956</td>
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<td>Dates: TBA</td>
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<th>Region 7 – US Western</th>
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<tbody>
<tr>
<td>Cal Poly San Luis Obispo</td>
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<td>Student Chapter # 804</td>
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<td>Dates: TBA</td>
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<tr>
<th>Region 10 – US West Central</th>
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<tr>
<td>University of Colorado</td>
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<tr>
<td>Student Chapter #810</td>
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<td>Dates: TBA</td>
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<tr>
<th>Region 11 – US West Pacific</th>
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<tbody>
<tr>
<td>University of Hawaii</td>
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<tr>
<td>Student Chapter #811</td>
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<td>Dates: TBA</td>
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<tr>
<th>Region 12 – US Southeast Atlantic</th>
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<tbody>
<tr>
<td>Florida Institute of Technology</td>
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<tr>
<td>Student Chapter #724</td>
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<td>Dates: TBA</td>
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<tr>
<th>Region 14 – US Midwest</th>
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<tr>
<td>University of Illinois</td>
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<td>Student Chapter #956</td>
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<td>Dates: TBA</td>
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<tr>
<th>Region 15 – US Central/South America</th>
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<tr>
<td>Universidad de los Andes</td>
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<td>Student Chapter #653</td>
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<td>Dates: TBA</td>
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<tr>
<th>Region 16 – Central/South America</th>
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<tr>
<td>Universidad del Bosque</td>
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<td>Student Chapter #636</td>
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<td>Dates: TBA</td>
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<tr>
<th>Region 21 – Middle East</th>
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<tr>
<td>University of Jordan</td>
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<tr>
<td>Student Chapter # 792</td>
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<td>Dates: TBA</td>
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Student Chapter Training is Back!

7 Great IIESE Course Offerings

• Lean Yellow Belt
• Six Sigma Yellow Belt
• Lean Green Belt
• Six Sigma Green Belt
• Lean Six Sigma Green Belt
• Operational Analytics Certificate
• From Engineer to Leader Certificate

3 Great Formats

• Live In-Person
• Livestream
• On-Demand
• Dates and logistics tailored to your students’ needs.

Benefits

• Provides a clear differentiator in a competitive job market.
• Significant discount from the industry rate.
• Opportunity to fundraise for your Chapter.

“Your Six Sigma course left an indelible mark on my career path. Since the course completion in 2016, I applied many of the lessons that you taught to my professional work, and I simply cannot get enough of the foundational discourse.”

— Athena Jade Ullah
Assistant Project Manager, STV Incorporated
Benefits to Recipients

- Provides a clear **differentiator** in a competitive job market with Six Sigma certificate holders earning an average of $16,193* more than their peers
- Significant **discount** from the industry rate
  - 70+% off the live in-person rate and 60+% off the online on-demand rate
- Enhances student **skills** to “hit the ground running” in industry
- Training from a **reputable** and trusted source
  - Six Sigma Course is ISO 13053 Compliant
  - IISE is IACET Accredited

*Source: 2021 ASQ Salary Survey*
Benefits to the Chapter

**FUNDRAISING!**

- Many schools add $25-50 to the registration fee to fund scholarships, trips, conference registration, or other chapter activities
- Brings value to student members
- Establishes your chapter and our profession as the “go-to” on campus for valuable certifications
- Gives student leaders great experience in marketing and managing a program that serves others
The Planning Process

IISE and the University Chapter hold a pre-planning call to discuss alternatives, answer questions, and set a plan for the course(s).

IISE sends the Chapter a contract to document the course plan along with a toolkit to follow to plan and market the course.

The University Chapter selects the registration model (either using an IISE-provided link or collecting registration information and fees itself).

The University Chapter markets the course and keeps the Faculty Advisor and IISE informed with regular updates.

IISE delivers the course, administers the exam, and issues the certificates.
You play a vital role in the success of IISE and the student chapter!

Please feel free to reach out to us with any concerns or questions.

Questions?
IISE staff members are available to assist you with your needs.

Kathy Gamboa, Director of Membership  
Kgamboa@iise.org, 770-349-1104

Doug Long, Global Director of Strategic Alliances  
Dlong@iise.org, 770-349-1109

James Swisher, Director of Continuing Education  
Jswisher@iise.org, 770-349-1130

Amy Straub, Membership Coordinator  
Astraub@iise.org, 770-349-1115

Website: www.iise.org