TOOLS FOR RUNNING AN ACTIVE SECTION

Or

SECTION LEADERSHIP TOOLS FOR DUMMIES
Make, How To, and DIY
instructables

FOR DUMMIES

One hundred projects for all ages!

A Reference for the Rest of Us!

By Instra K Tibles
LEADERSHIP TOOLS FOR SECTION FOR DUMMIES - Chapters

• Chapter 1 – Board Volunteers
• Chapter 2 – Know Your Section
• Chapter 3 – Communications
• Chapter 4 – Membership
• Chapter 5 – Education
• Chapter 6 – EVENTS
• Chapter 7 – Section Operations Manual
• Chapter 8 - ISA
Contributing Author: ARDIS BARTLE

- Past President Houston Section 2015-2016
- DVP Elect District 7
- Division Leader of the Year 2016 Members Choice
- Director- Management Division
- Past President Houston Section 2012-2013 and 2015-2016
WHAT DEFINES AN ACTIVE SECTION?

• MAOP say 30 active members, minimum 2 Board officers, bank account, bylaws

• Leadership Tools for Section for Dummies says: President with a vision and goal, and working through their year towards achieving that vision and goal.

• ISA Goals:
  Data
  Content
  Coolest Delivery
  Cybersecurity
  Advocacy
What is the quickest way to Kill a section?
CHAPTER 1: BOARD VOLUNTEERS

• Recycling Board Members is surest way for Death for a Section

• The Board is the “Heart of the Section”

• Everyone wants to be “asked” to be a part of something

• Opportunities to ask people to join:
  – Monthly Meetings
  – Section Events: Golf Tournaments, Chili Cookoff,
  – Company Events: Company Meetings, Lunch rooms
  – Vendors: Vendors are always looking for opportunities to be a part of an active Section
  – Approach your main constituents in your Section area
CHAPTER 1: BOARD VOLUNTEERS
(continued)

• When you meet someone, do you ask them to come to a board meeting, invite them to join your committee or make sure they are included in an upcoming event?

• Make sure if they come to a Board Meeting you assign them ANY task or committee – get them involved.

• Don’t worry about having a Large Board

• Go to your Main Constituent Companies and ask them for their Leaders
# 2017-2018 Officers List

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• Asking for Companies Leaders:
  – Send email requesting as President or Leader at ISA for 30 minutes to inform companies leadership as to ISA Section direction, what the companies need from them, and a direct appeal to them to provide one engineer that ISA will train and make a leader to enhance their own organization.
  – Tips for Successful Meeting when asking for Leaders
    – Be Clear the meeting will be less than 30 minutes and hold to that schedule
    – Stay on agenda, be clear on your questions, and listen
    – Leave with commitment from the company on one of your questions
During the Meeting:

- Ask the Leadership to support one engineer to be on the board, participate/attend in monthly board meetings each month.
- Ask the Leadership if they would be willing to host a Section Meeting at their facility
- Ask the Leadership if they would be willing to post ISA News like Scholarship opportunities, Education/Training, Chili Cookoff or Golf Tournaments in their newsletter
- Ask Leadership if they would host ISA Training at their facility for consideration
- Ask the Leadership if they pay dues for their local Section
CHAPTER 2: KNOW YOUR SECTION

• Identify your geographic footprint

• Think About Your Section – Who is your target market?
  – Fortune 500 Companies
  – Engineering or EPC Firms
  – Process Control Facilities

• Identify your typical age and makeup of your attendee?
  – Identify why do they become a member?
    – Education
    – Training
    – Networking
    – In order to Serve
    – Company Told them to Join Something
Networking Events

– Planning a Networking Event
– Geographic Location
– Identify function reflects your target market
– Identify location where members can easily get to
– Identify members and ask them if they can attend and bring someone
– Ask companies to post or send out in their newsletter
– Identify how Membership will personally invite and capture new members
CHAPTER 3: COMMUNICATIONS

• Reaching out to Your Members, Potential Board Members and Constituents:
  – Tools Needed:
    – Website or ISA MicroSite
    – Linkedin
    – Newsletters
    – List of Friends of ISA
    – Calendar

• Website – Make sure everyone know where your website is
  – Websites should reflect your calendars and upcoming activities as well as a phone contact
  – Is your calendar on your website?
Calendar
ISA Houston Section
2016-2017 Calendar

(Non ISA Houston Section activities are in italics)

Jul 15, 2016—Houston Section, Planning Meeting. @Honeywell Process Solutions, 1250 W Sam Houston Pkwy S #1

Aug 3 2016 — Houston Section, Lunch. @Hess Club . General Section Meeting: Presenter Paul Gruhn
Aug 17, 2016 — ISA Houston Analysis Subsection Meeting @ 6:30 PM Monument Inn 4406 Independence Parkway South
Aug 18-20, 2016 — ISA CSE Exam Review Training (Phoenix Contact)
Aug 24, 2016 — ISAHS CSE Study Group @ 6 - 8 PM AMEC
Aug 26 2016 — Board Meeting 1:00 @ W-Industries 11500 Charles Rd, Houston, TX 77041
Aug 31, 2016 — ISAHS CSE Study Group @ 6 - 8 PM AMEC

Sep 7, 2016 — Houston Section, Lunch. @KBR, 601 Jefferson Street, Houston, TX 77002, Texas Room. General Section Meeting
Sep 7, 2016 — ISAHS CSE Study Group @ 6 - 8 PM AMEC
Sep 7-8, 2016 — Using the ISA IEC 62443 Standards to Secure Your Control System (IC32)
Sep 9, 2016 — IC32 Exam

Sep 9, 2016 — ISA Houston Analysis Subsection 40th Annual Shrimp Boil at Clear Lake Park on NASA Parkway with Shrimp Boil with NASA Foundation
Sep 13-15, 2016 — Assessing the Cybersecurity of New and Existing IACS Systems (IC33)
Sep 14, 2016 — ISAHS CSE Study Group @ 6 - 8 PM AMEC
Sep 16 - IC33 Exam
Sep 16, 2016 — ISA Texas Chapter Section Sporting Clay Shoot Benefit @ Clay Mound Sporting Center, 2001 Texas Ave
Sep 20-22, 2016 — IACS Cybersecurity Design & Implementation (IC34)
Sep 23 - IC34 Exam
Sep 21, 2016 — ISAHS CSE Study Group @ 6 - 8 PM AMEC

Sep 24-27, 2016 Fall Spring Leader Meeting Newport Beach Marriott (CA)
Sep 27-29, 2016 — IACS Cybersecurity Operations & Maintenance (IC37)
Sep 30, 2016 — IC37 Exam

Sep 28, 2016 — ISAHS CSE Study Group @ 6 - 8 PM AMEC
Sept 30, 2016 — Board Meeting 1:00 @ Phoenix Contact (3993 West Sam Houston Pkwy N Suite 500, Houston, TX 77041)

Oct 5, 2016 — Houston Section, Lunch. @Jacobs Engineering, 5995 Rogerade Rd, Houston, General Section Meeting
Oct 5, 2016 — ISAHS CSE Study Group @ 6 - 8 PM AMEC
Oct 5-7, 2016 ISA Technician Training Boot Camp (TBC) (Kenexis)
Oct 10-14, 2016 ISA Automation Engineering Survival Training (AEST) (Kenexis)
Oct 12, 2016 — ISAHS CSE Study Group @ 6 - 8 PM AMEC
Oct 17-21, 2016 Safety Instrumented Systems - Design, Analysis & Justification (EC50) (Kenexis)
Oct 18, 2016 Automation Showcase EXPO that is free to the automation community (An instrumentation, Systems an
Oct 19, 2016 — ISAHS CSE Study Group @ 6 - 8 PM AMEC
Oct 19, 2016 — ISA Houston Analysis Subsection @ 6:30 PM Monument Inn 4406 Independence Parkway South (Bar
Oct 21, 2016 Houston Pipeline Subsection Golf Tournament @ Cypress Lakes Golf Club, 18700 Cypresswood Dr., C
Oct 21, 2016 Networking Event after Houston Pipeline Subsection Golf Tournament @ 5:30 PM free to ISA Member
Oct 22-25, 2016 Advanced Safety Integrity Level (SIL) Selection (EC52) (Kenexis)
Oct 26, 2016 — ISAHS CSE Study Group @AMEC
Oct 26-27, 2016 Advanced Design & SIL Verification (EC54) (Kenexis)
Oct 28, 2016 — CSE Exam Day
Oct 28, 2016 Board Meeting 1:00 @ W Industries Rd, 11500 Charles Rd, Houston, TX 77041

Nov 1-3 Fire and Gas Systems Engineering - Performance Based Methods for Process Facilities
Nov 7, 10 2016 Process Control and Safety Symposium @Marriott Westchase 2900 Briarpark Drive, Houston, TX 77
Nov 9 @ 8 PM - 7 PM Workshop at PCS Conference
Nov 9 - Texas Channel Section Scholarship Golf Tournament @ 9 AM, 1600 Georgia Ave, Deer Park, TX
• Email List
  – ISA List Serv
  – Create your Own Email List - Membership List plus Vendors from Fundraising, as well as LinkedIn Contacts
  – Using Content Active/MailChimp or some other type of database tool to send out emails and grow your list

• Contract a 3rd party to handle your newsletter and maintain your communications database
  – Contractor SHOULD NOT be a Board Member
  – Board Officer should be the approval process for all tasks for the contractor
  – Board should agree on schedule for newsletters, email notices, marketing, etc
  – Membership Chair needs to keep Board Officer up-to-date on new members for database
Safety Moment

Safety Photo for the Week!

[Image of a worker on a power line]

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CHAPTER 4: MEMBERSHIP

• What is your biggest opportunity to recruit members?

• When is the last time your approached a total stranger at ISA Event and introduced yourself and asked them to join?

• Do you make joining easy?
  – IPAD
  – Carry Paper membership forms
  – Send emails and followup
  – Membership Chair comes out and makes a presentation
CHAPTER 4: MEMBERSHIP (continued)

• Student Sections
  – List the student Sections in your Section
  – Why are Student Sections so important?

• Your Section Impact on Student Sections:
  – Students generally have a full case load and full debt load
  – Lack opportunity to interact with professionals
  – All need Mentors
  – Learn to interact Socially with professionals and learn leadership skills
  – Scholarship opportunities
• These are the future leaders – in 10 years maybe not in ISA, but ASME, NACE, ANSI – Section Student Sections are the feeders into the next generation of leaders in business and standards

• Do you know where your members are?
  – Some are on Standards
    – Get List from ISA
    – Potential Speakers
  – Some come to meetings
  – Some only want to participate at social functions
  – Some want to attend training opportunities
  – Some want to have visibility in Sections news and functions
• Two Types of Education/Training

  – Scheduled Meetings – Section is required to hold meeting(s) with a program for the regular membership to attend.
    
    *Note: MAOP says a “section must hold (3) three section meetings a year*

  – Education Training –
    
    – Section Sponsored– Your section can ear 10-20% of the gross registration fees collected by ISA headquarters
    
    – PE/CSE Study Groups
    
    – Trade / Table Top Shows
CHAPTER 5: EDUCATION/TRAINING

• Define Education/Training for Your Section
  ISA Training
  Section Training

• Host A Boot Camp or CyberSecurity Training in Your Backyard
  – Sections get 10% of proceeds
  – Sections get two slots in the training course

• Section Hosted Training – Define the needs of your section
• For Example – Host Your State PE Exam Prep Study Groups (TX has 10 Sections)
  – Schedule 10 Nights, One for Each Section,
  – Find Engineering firm or facility to host
  – Must be an ISA Member to attend, but it’s free to all members
  – Recruit one person to moderator for each section’s expertise.
  – Contact Gerald Wilbanks or Magda Moreno for test questions from previous exams to work through.
  – Allow the students to work through the problems and come up to the board and show how they answered them
  – Provide snacks and drinks
  – Follow-up with students to determine success rate of passing exam
CHAPTER 5: EDUCATION/TRAINING

ISA Mentor Program

• Operates online, no meetings to attend, no travel, open to all ISA Members worldwide

• Engineers/Technician currently employed in engineering or plant office, preferably 10 years of experience, actively designing, installing or maintaining process control system

• Contact Susan Colwell- scolwell@isa.org
CHAPTER 6: EVENTS

2017 ISA Houston Section 15th Annual
EXPO & CHILI COOKOFF
THURSDAY, NOVEMBER 9, 2017
www.houstonisa.org

New Venue:
The Oil Ranch
23501 Macedonia Road
Hockley, Texas 77477
Thursday November 9, 2017 from 5-9pm

Click Here to RSVP for the Expo & Chili Cook Off
Annual Tabletop Show Wednesday April 26th 2017

2017

ANNUAL TABLETOP

WEDNESDAY

APRIL 26, 2017

LAKE JACKSON CIVIC CENTER

3:00 pm to 7:00 pm

INTERNATIONAL SOCIETY OF AUTOMATION – BRAZOS SECTION INVITES YOU TO COME OUT AND VISIT WITH OUR MANUFACTURER’S AND REPRESENTATIVES TO SEE THE LATEST IN INSTRUMENT, ANALYZER & PROCESS CONTROL TECHNOLOGY

FREE BAR-B-QUE DINNER & BEVERAGES

OVER $1,000.00 IN DOOR PRIZES

(Must be present to win)

Posted on March 28, 2017 in Announcements Comments: Leave a comment
BECOME A SPONSOR

Want to do more to help the ISA New Orleans Section? Consider becoming a Section Sponsor. Sponsorship is only $150.00 per year. In addition to helping the local section, your sponsorship also provides your organization these benefits: Logo, company information,...

Read More

Category: Community  Tags: Sponsor, Sponsorship

ISA New Orleans Section Chapter

Chapter 6 Events
CHAPTER 6: EVENTS – Mary Cannon
m.cannon@as-Schneider.com

ISA YAPFEST
Houston Section

Become the future of automation.

Who: Engineering Students, Oil Field Professionals, and Young Automation Professionals
What: 2017 YAPFEST
When: Wednesday, 8 November 2017, 5:00 p.m. – 7:00 p.m.
Where: ISA Process Control & Safety Symposium and Exhibition
Houston Marriott Westchase
2900 Briarpark Drive
Houston, Texas 77042
Why: Enjoy food, and networking with current automation professionals—find out exactly what they do, and how you can prosper in a future automation career.

This unique networking event will give Young Automation Professionals (YAP) and college students interested in automation careers the chance to interact with peers and automation companies in a festive atmosphere. This event will focus on the benefits of developing a strong professional network in your future career.

Attendees will be able to...
- Expand their professional networks
- Interact with peers who share similar interests
- Enhance professional growth
- Discover new career opportunities
- Learn the value of networking through a professional membership association
- Network with prominent automation professionals and companies

For more information, contact Mary Cannon:
m.cannon@as-Schneider.com
713-692-5044 cell
www.houstonise.org
ISA Texas Channel Section Sporting Clay Shoot Benefit

**September 8 @ 9:00 am**

$160 - $2500.

**Registration Information:**

100-round Course
Ammunition for the Round provided ~ Specify 12 or 20 gauge
CHAPTER 6: EVENTS

• ISA Awards – Nominate your Section Members
  – Leadership
  – Education
  – Members Choice
  – Society Service
  – Technical Innovation

Volunteers like to be recognized. By taking the time to put their name forward (with their help), you are encouraging them to be active members and board members.
Also, on their CV or resume, they can put they have been nominated by their Section for the award.
Most importantly, volunteers respond to being recognized and work harder.
CHAPTER 7: SECTION OPERATING MANUAL

• https://www.isa.org/section-operations-manual/

• Chapters
  – Sections Role Within ISA
  – Organizing for Success
  – Section Planning
  – Section Continuity
  – District & Society Meetings
  – Section Meetings
  – Section Membership Growth
  – Section Reporting
CHAPTER 7: SECTION OPERATING MANUAL

• Roles and Responsibilities
  – ISA Section Delegate Responsibilities
  – ISA Section Program Chair
  – ISA Section Membership Chair
  – ISA Section Education Chair
  – ISA Section Newsletter Chair

• Updates Coming to Section Operating Manual
  – ISA Section Website Chair
  – ISA Student Section Membership Chair
  – ISA Events Chair
  – ISA Scholarship Chair
  – ISA Awards Nominations (Ex President)
  – ISA Nominations Committee (Ex President)
Safety Moment

Safety Photo for the Week!

Please do not try this at home!
CHAPTER 8: ISA HEADQUARTERS

• Section Contact Email: sections@isa.org

• District Vice President(s)

• District Leadership Meeting

• ISA Fall Leaders Meeting

• MAOP Manual of Organization and Procedures
  https://www.isa.org/members-corner/leader-resources/operating-documents/
BEST TOOL: YOU

• Lead by Example
• Take a Deep Breath
• Rely on your Board and Team
• Listen, Listen, Listen
RESOURCES

• Magda Moreno, Education Chair, Houston Section
  – Magda.Moreno@chevron.com  (713) 306-7349

• Gerald Wilbanks, ISA Fellow
  – gwilbankspe@charter.net  (205) 655-7076

• Ardis Bartle, DVP Elect 7
  – ardisbartle@apexmeasurement.com  (713) 446 1902