

AGENDA ITEM IV-C

(DRAFT) MEMORANDUM

TO: IEEE-USA OpCom

FROM: Gerry Alphonse, 2005 President

SUBJECT: Discussion on Possible IEEE-USA Conference/Forum to Address Offshoring and/or Related Issues

At our November meeting, the Board endorsed a proposal by John Meredith to develop plans for an IEEE-USA Forum on offshore outsourcing, with the goal of bringing together key decision-makers to reach consensus on policy solutions. As agreed, I formed a steering committee comprised of Ron Hira, Russ Lefevre, John Meredith, George McClure, and the Presidents, with staff support to develop a preliminary plan for discussion at the January OpCom meeting.

Subsequent to that action, a delegation met with staff for Senator Lieberman (the principal congressional advocate on S&T and offshoring issues), who highlighted the difficulties in building legislative consensus due to the dearth of data on offshoring's impacts on the economy. We were encouraged to look at offshoring as a symptom of a larger challenge posed to U.S. innovation by global trends. We were also encouraged to align our efforts with the Nat'l Innovation Initiative. The NII report outlining recommendations was released by the Council on Competitiveness in mid-December (see http://www.compete.org/pdf/NII_Final_Report.pdf). Our role would be to bring the broader professional engineering community to the table in support of NII-related initiatives. We were warned, however, that it is not clear that the NII participants (e.g. IBM) are truly committed to working its recommendations, and White House support for a national initiative seems iffy at best.

With that input, our steering committee meet by teleconference on Dec. 21st and outlined several broad goals and options for a possible conference/forum. We resolved to bring those options to OpCom for further discussion.

IEEE-USA CONFERENCE/WORKSHOP

OVERALL GOAL(S)

1. To proactively address an issue(s) of concern to our members.
2. Ensure that our members are aware that we are proactively addressing the issue(s).
3. To make sure high-tech workforce issues are part of the overall policy discussion and raise their visibility (and establish our role) with decision-makers.

4. To build alliances and coalitions, particularly with other scientific and technical organizations.

OPTIONS FOR DISCUSSION:

1. High level and balanced discussion of outsourcing. Highlights the good and bad implications of outsourcing, and what we can do to maximize the good and mitigate the bad impacts.
2. Focused event on re-employment strategies for US technology workers
3. Engineering Societies Forum to build coalition on innovation priorities (and support NII)
4. Other ideas (see below).

OPTION 1: High Level Roundtable on Outsourcing

Goal: Open dialogue that shows both the good and bad aspects of outsourcing. The discussion is measured and reasoned. The forum talks about the positives and negatives, but highlights the need to do something about it!

Format: Roundtable (with keynotes or focus speakers?) or panel sessions with discussion.

Speakers/

Participants: Invite high level people on both sides of the debate. Analysts (e.g. Ralph Gomory, Lee Price, EPI, Catherine Mann, Jagdish Bhagwati, Richard Freeman, Thea Lee, Dan Griswold, Steve Clemons, Charles McMillion, Kent Hughes, Murray Weidenbaum), Gov't (Loren Yager, GAO, Phil Bond, John Sargent, DOC, Elaine Chao, DOL, OSTP/PCAST, Reps. Manzullo, Wolf, Boehlert, Gordon, Sen. Lieberman, others), Industry (Bruce Mehlman, Harris Miller, Deborah Wince-Smith), EE/CS deans/department heads, Bill Wulf (NAE), etc.

Audience: Participants, media. IEEE-USA can stream video to members via web (IEEE.tv?)

Issues: Will lose industry and high-level participation if we don't frame issue properly. Can't be anti-globalization or presume offshoring is bad, and hope to attract high-level speakers on both sides of the issue.

OPTION 2: Re-Employment Strategies Workshop

Goal: Educate members on re-employment strategies, and highlight reemployment issues and challenges facing US technology workers to policy-makers.

The least reported aspect of the outsourcing story is how poor the re-employment prospects are for displaced workers. If we can reveal this fact to a broad audience, then we can show how the outsourcing debate has been misplaced. Also, if we focus on practical things that our members can do to buffer themselves from globalization, then we can focus the DoL and others on where to put their money. All of this can be done in a very positive way that doesn't make us look like 'whiners'.

- Format: Keynotes and panel sessions.
- Speakers: Lori Kletzer (UCSC economist), William Lazonick (Center for Industrial Competitiveness), Dept of Labor officials like Tom Dowd, Elaine Chao, GAO personnel who have studied TAA
- Audience: Our members and selected policy types (e.g. Hill staff, selected gov't officials).
- Issues: Will our members pay to attend? How can we capture content for members who aren't there?
- Alternative: Shift focus of the event from educating our members on reemployment strategies to a narrower focus on a high-level evaluation of federal retraining programs and their relevance to the needs of our community.

OPTION 3 Engineering Societies Innovation Forum

- Goal: Building on the NII and society policy agendas, define a collaborative approach to promoting U.S. innovation as an answer to offshoring and other challenges to the U.S. high tech workforce (i.e. our members).
- Format: Panel sessions and/or roundtables, with breakouts for planning.
- Speaker: Council on Competitiveness (to brief the NII), society leaders, selected experts to lay the background, congressional staffers to identify what is possible on Capitol Hill, congressional/executive "champions" as keynoters to motivate.
- Participants: Leadership/GR representatives of invited engineering (and scientific?) societies.
- Issues: Is there common interest and priority on this issue among societies? Format implies a collaborative co-sponsorship....are we willing to share control over the program.
- Alternatives: Open up attendance to all members of sponsoring societies.

OTHER IDEAS

- 1) A forum focused on educating and activating our grassroots on a selected issue(s): e.g. innovation, immigration, H-1B, offshoring, etc. Note: this is similar to our session at IEEE-USA Leadership Workshop, but on a larger scale.
- 2) Select a specific recommendation(s) from NII report and build an event designed to develop a plan of action to achieve it; including broad coalition-building as needed.
- 3) Instead of a forum, arrange a series of webinars on offshoring, retraining, career issues, and innovation issues. Twelve one hour programs, with an invited speaker. Could seek Foundation or New Initiative monies to fund the series.