IEEE Region 8 New Volunteer orientation

Antonio Luque, Region 8 Director 2021-2022
Helsinki, Finland, 27 March 2026

A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity.

Outline

- Introduction of participants
- Short Overview of IEEE
- Short Overview of Region 8
- Overview of Member and Geographic Activities (MGA) Board
- Running a Section
- Volunteer tools
  - Section OU Analytics
  - Classification of Documents
  - IEEE branding
- Region 8 Committee meetings
- Basics of finances and expense reporting
- Concluding Remarks and Q&A
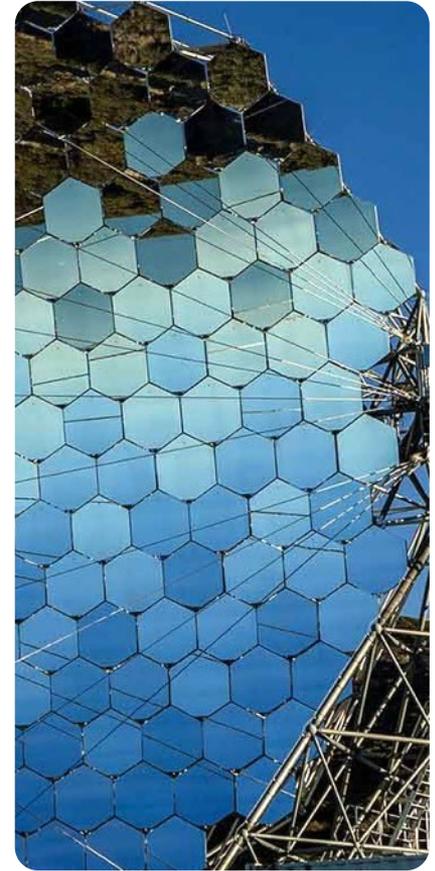
1. Introduction of participants

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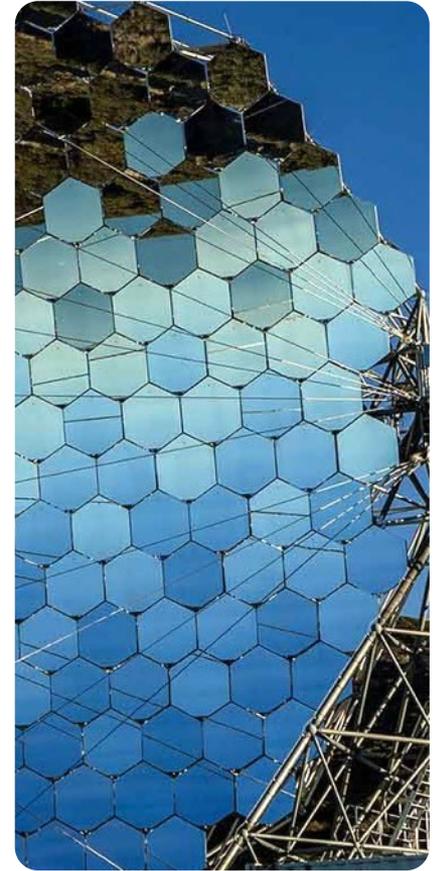
Your turn!

In 30 seconds or less!

- I am from...

- My professional position...

- My IEEE position...

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2. Short overview of IEEE

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What is IEEE?

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What is IEEE?

IEEE and its members inspire a global community through IEEE's highly cited publications, conferences, technology standards, and professional and educational activities.

Key values are technical innovation, access to cutting-edge information, networking opportunities, and exclusive member benefits.

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IEEE mission and vision

Mission statement: IEEE's core purpose is to foster technological innovation and excellence for the benefit of humanity.

Vision statement: IEEE will be essential to the global technical community and to technical professionals everywhere, and be universally recognized for the contributions of technology and of technical professionals in improving global conditions.

Strategic goals

OUR GOALS

Advance science and technology as a leading trusted source of information for research, development, standards, and public policy

Inspire intellectual curiosity and support discovery and invention to engage the next generation of technology innovators

Drive technological innovation while promoting scientific integrity and the ethical development and use of technology

Expand public awareness of the significant role that engineering, science, and technology play across the globe

Provide opportunities for technology-related interdisciplinary collaboration, research, and knowledge sharing across industry, academia, and government

Empower technology professionals in their careers through ongoing education, mentoring, networking, and lifelong engagement

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Core values

Growth & Nurturing · Trust · Partnership · Integrity in Action · Global Community Building · Service to Humanity

- **Trust**: being a trusted and unbiased source of technical information, and forums, for technical dialog and collaboration.
- **Growth and nurturing**: encouraging education as a fundamental activity of engineers, scientists, and technologists at all levels and at all times; ensuring a pipeline of students to preserve the profession.
- **Global community building**: cultivating active, vibrant, and honest exchange among cross-disciplinary and interdisciplinary global communities of technical professionals.
- **Partnership**: promoting a culture of respect for the employee and volunteer, valuing contributions at all levels of the organization, investing in training and development to enhance capabilities, empowering individuals to make a positive difference, and building a membership organization based on a strong volunteer-staff partnership to serve the profession.
- **Service to humanity**: leveraging science, technology, and engineering to benefit human welfare; promoting public awareness and understanding of the engineering profession.
- **Integrity in action**: fostering a professional climate in which engineers and scientists continue to be respected for their exemplary ethical behavior and volunteerism.

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A membership-based organization
Benefits of membership

- Trusted voice.
- Global community.
- Profession:

    - Keeping technically current,

    - Career resources and recognition,

    - Professional networking,

    - Continuing education.
- Member discounts.

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Member grades

- **Student**: At least 50% of a normal full-time academic program as a registered undergraduate or graduate student in a regular course of study in IEEE-designated fields.
- **Graduate student**: At least 50% of a normal full-time academic program as a registered graduate student in a regular course of study in IEEE-designated fields.

  - The total cumulative period for a member to hold the Student member grade and/or the Graduate Student member grade is limited to eight years.

  - Student members or Graduate Student members, upon graduation or upon reaching the total cumulative eight-year limit as a Graduate Student member (whichever occurs first), will be transferred automatically to member grade.

Member grades

- **Associate**: Technical and non-technical individuals who do not meet the qualifications for member grade but who wish to benefit from membership and partnership in IEEE, and for those who are progressing, through continuing education and work experience, toward qualifications for member grade.

  - Student members outside of the IEEE-designated fields, upon graduation or upon reaching the eight-year limit (whichever occurs first), will be transferred to Associate member grade.

Member grades

- **Member**: Those who have satisfied IEEE-specified educational requirements and/or who have demonstrated professional competence in IEEE-designated fields of interest. For admission or transfer to the grade of member, a candidate may be either:
    - An individual who has received a three- to five-year university-level or higher degree from an accredited institution or program and in an IEEE-designated field,
    - An individual who has received a three- to five-year university-level or higher degree from an accredited institution or program and who has at least three years of professional work experience engaged in teaching, creating, developing, practicing, or managing in IEEE-designated field,
    - An individual who, through at least six years of professional work experience, has demonstrated competence in teaching, creating, developing, practicing, or managing within IEEE-designated fields.

Member grades

- **Senior Member**: Highest grade for which application may be made. Requires experience reflecting professional maturity. A candidate shall be an engineer, scientist, educator, technical executive, or originator in IEEE-designated fields and shall have been in professional practice for at least ten years and shown significant performance over a period of at least five of those years, such performance including one or more of the following:
  - Substantial responsibility or achievement in IEEE-designated fields,
  - Publication of papers, books, or inventions in IEEE-designated fields,
  - Technical direction or management of important work with evidence of accomplishment in IEEE-designated fields,
  - Recognized contributions to the welfare of the professions encompassed by IEEE-designated fields,
  - Development or furtherance of important courses in one or more of the IEEE-designated fields at an institution in the REP list,
  - Contributions equivalent to those of the above areas related to IEEE-designated fields, provided these contributions serve to advance progress substantially in IEEE-designated fields.

Member grades

- **Fellow**: Recognizes unusual distinction in the profession and is conferred only by invitation of the Board of Directors upon a person with an extraordinary record of accomplishments in any of IEEE's designated fields of interest.

    - The candidate shall hold Senior member grade at the time the nomination is submitted.

    - Normally, the candidate shall have been a member in any grade for a period of five years or more preceding 1 January of the year of election; however, the five-year membership requirement may be waived for a Fellow candidate who has been engaged in professional practice (as needed to qualify for Senior member grade) in a geographical area where, in the judgment of the Board of Directors, it was difficult to become a member previously, as evidenced by the absence of a Section previously and the recent formation of a new Section to cover that geographical area. In such case, membership of five years or more in a recognized local electrical, electronics, or computer-engineering society may substitute for the five-year IEEE membership requirement, when the nomination is submitted within four years after the formation of the new Section.

2026 Annual Membership Cycle- Key Dates
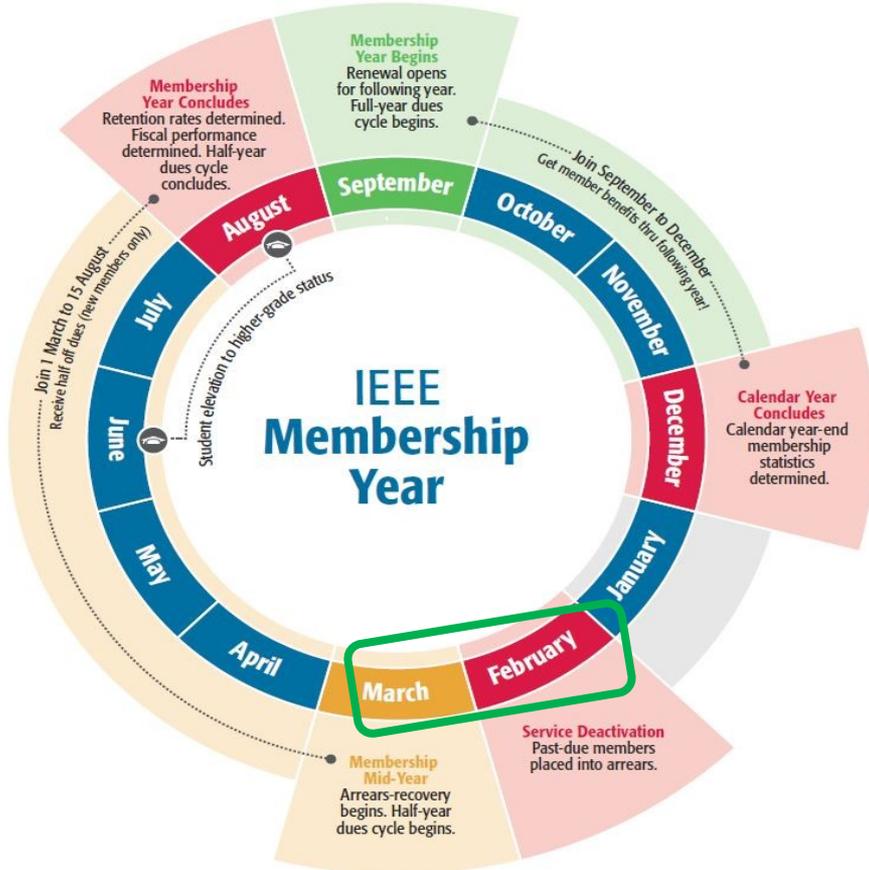
- <u>31 December</u> - Official end of the membership year
  - Unrenewed 2025 Members given a two-month grace period to renew for 2026 before membership benefits are deactivated

- <u>28 February</u> - Annual service deactivation runs
  - After deactivation, unrenewed members are removed from active membership counts and placed in arrears.
  - Anticipating ~200k total members impacted
  - Arrears Recovery efforts commence

- <u>1 March</u> - Start of the 'half-year dues' period for new members only
  - Dues are automatically discounted by 50%
  - New members receive benefits through 31 December of this year

IEEE quick facts (1)

- More than **500,000** members in 190 countries;
- 36% live in the United States (R1-R6), 64% in R7-R10.
- More than **160,000** student members.
- 349 Sections in 10 geographic Regions worldwide.
- 2,914 Chapters unite local members with similar technical interests.
- 3,759 Student Branches at colleges and universities in 100 countries.
- 5,759 Student Branch Chapters of IEEE Technical Societies.
- Total of 14,643 Geographical units

Figures as of February 2026

IEEE PROPRIETARY   A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity.

IEEE quick facts (2)

- 708 Affinity Groups, non-technical sub-units: Young Professionals (YP), Women in Engineering (WIE), Life Members (LM), IEEE-USA Consultants' Network.
- 39 Societies, 8 Technical Councils and 15 Technical Communities representing the wide range of IEEE technical interests.
- More than **6.7 million documents** in IEEE Xplore Digital Library, more than 15 million downloads each month.
- More than 1,000 active standards and more than 1200 projects under development.

Figures as of February 2026

IEEE quick facts (3)

- More than **200 transactions, journals and magazines** (1/3 of the world's technical literature in electrical engineering, computer science and electronics):

    - 17 of the 20 top-cited publications in electrical and electronics engineering,

    - 75% of the authors are from outside USA.

- More than **2,000 conferences** in 106 countries:

    - partnering with 1,300 non-IEEE entities globally,

    - attracting more than 485,000 conference attendees,

    - publishing over 200,000 new conference papers annually

Figures as of February 2026

IEEE organization

- Brings together members with similar interests.
- Sponsors
    - Conferences,
    - Workshops,
    - Tutorials,
    - Seminars,
    - And so on.
- Develops publications:
    - Journals,
    - Magazines,
    - Newsletters.
- Recognizes member accomplishments.
- Helps members to network through Societies, Chapters, Conferences, and other tools, e.g., IEEE Collabratec

IEEE Regions

TOTAL 31 December 2025 MEMBERSHIP: 533,598

R7 – 14,452

R1-6 – 161,348

R8 – 94,739

R10 – 237,819

R9 – 25,240
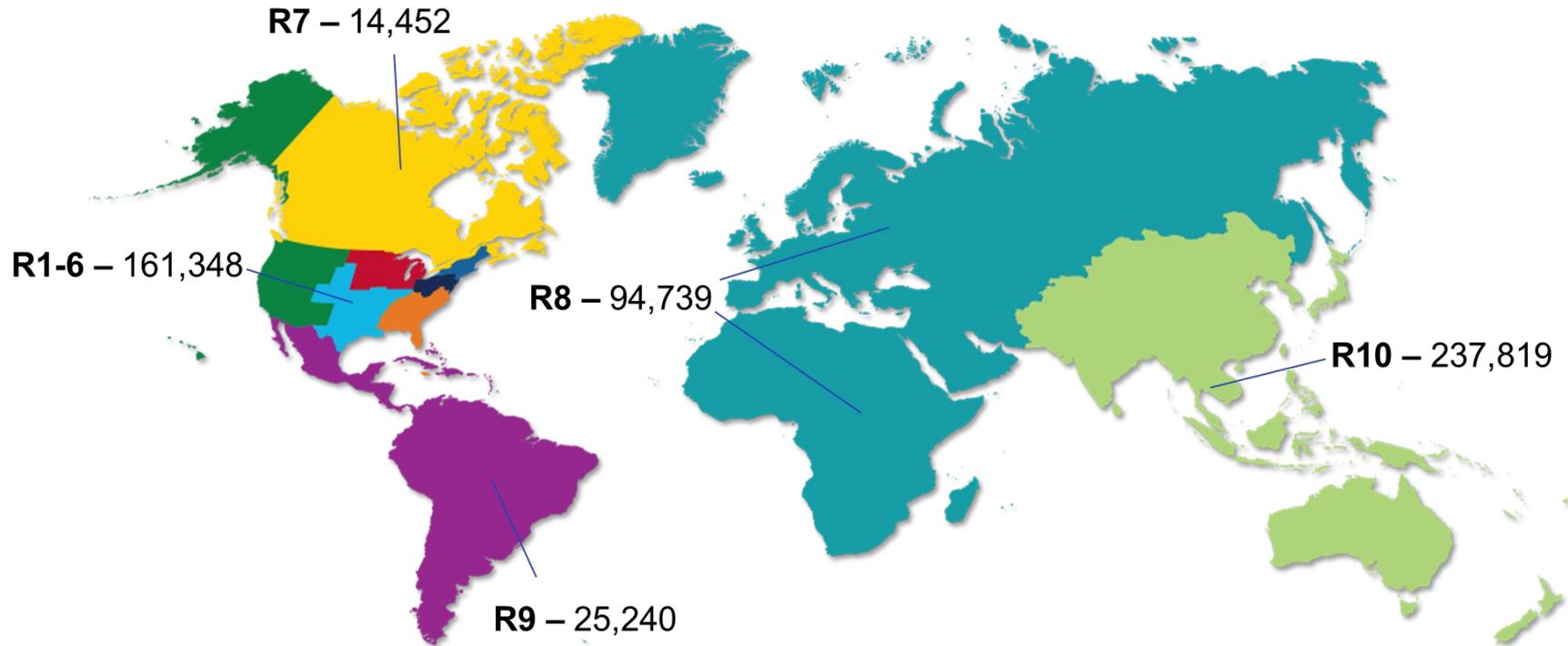
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IEEE Divisions

39 Societies and 8 Technical Councils grouped in 10 Divisions (same number as for Regions):

I. Circuits and Devices (CAS, ED, SSC; CEDA, Nano)

II. Industrial Applications (CPMT, DEI, IA, IM, PEL, UFFC)

III. Communications Technology (Com)

IV. Electromagnetics and Radiation (AP, BT, CE, EMC, Mag, MTT, NPS; CRFID, CSC)

V. Computer (C)

VI. Engineering and Human Society (E, IE, PSE, PC, R, SIT, TEM)

VII. Energy and Power Engineering (PE)

VIII. Computer (C)

IX. Signals and Applications (AES, GRS, IT, ITS, OE, SP, VT)

X. Systems and Control (CIS, CS, EMB, Pho, RA, SMC; Bio, Sen, Sys)
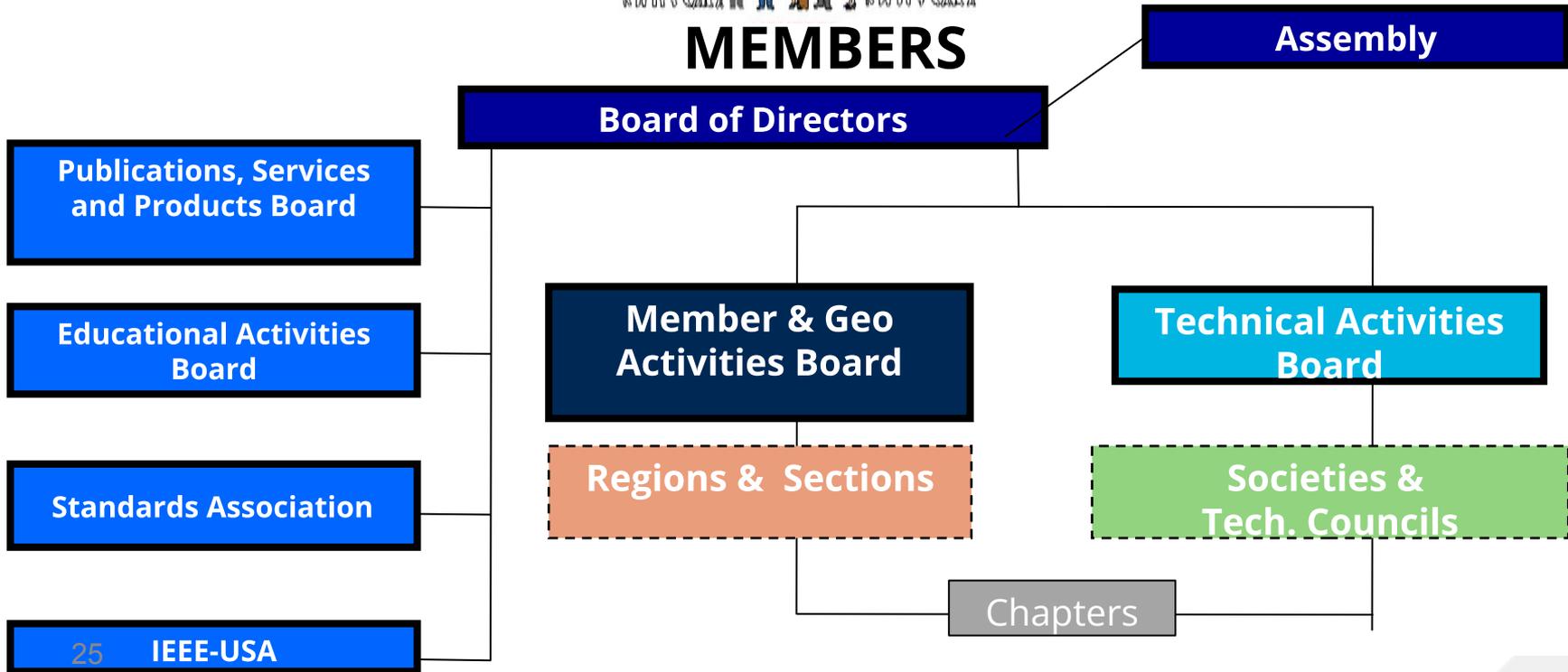
IEEE Section. The basic GeoUnit

- Sections provide a local community of colleagues.
- Members build a network through activity in
  - Sections,
  - Chapters within the Section,
  - Student Branches within the Section.
- Volunteers develop new skills and experience:
  - Management,
  - Teamwork,
  - Leadership.
- Volunteers:
  - Gain recognition,
  - Recognize achievements of others.

IEEE Governance structure (simplified)

MEMBERS

Assembly

Board of Directors

Publications, Services and Products Board

Educational Activities Board

Standards Association

IEEE-USA

Member & Geo Activities Board

Technical Activities Board

Regions & Sections

Societies & Tech. Councils

Chapters

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IEEE Governance

- **IEEE Board of Directors**

  - 31 voting members: 3 "Presidents" + 6 Vice Presidents + Secretary + Treasurer + 10 Regional Directors + 10 Division Directors

  - voting members of IEEE elects a President each year (serving for three years: President-Elect, President and CEO, Past-President)
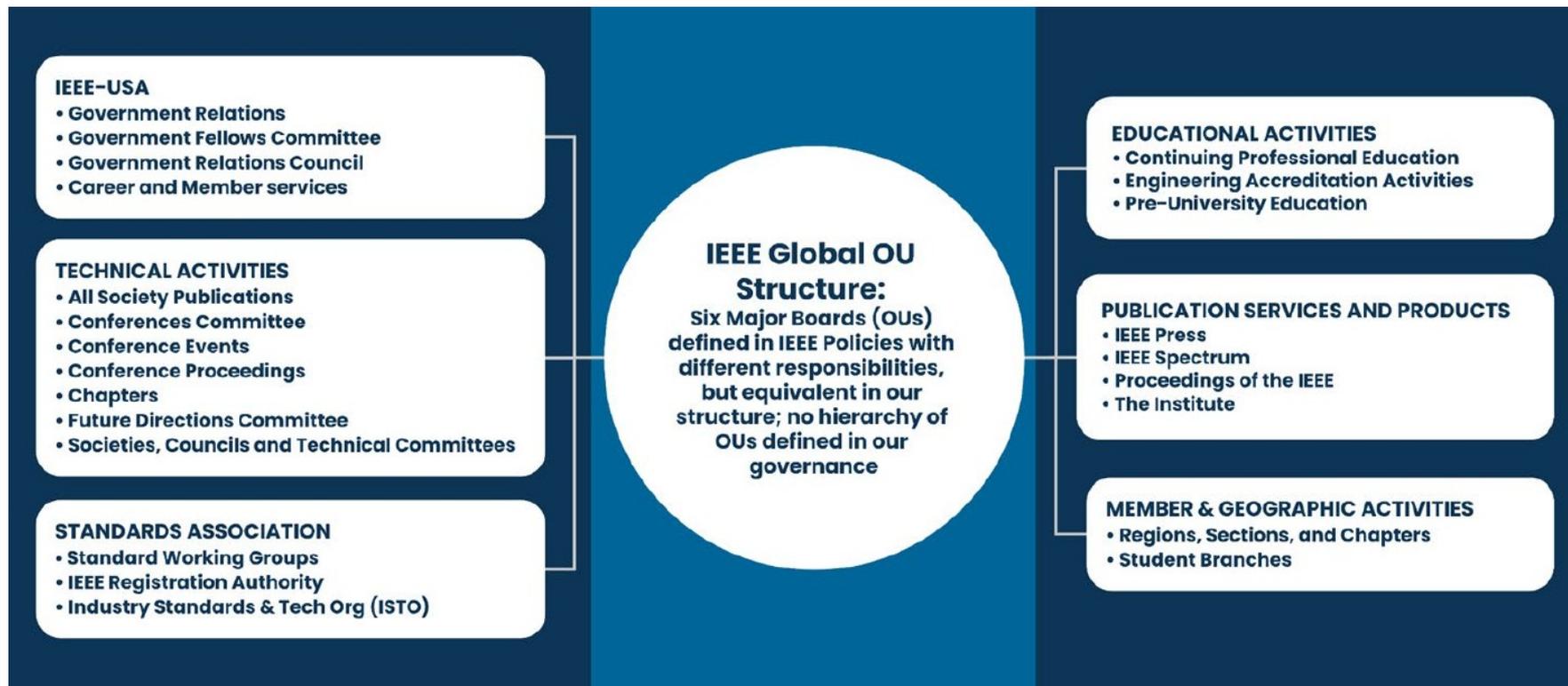
- **IEEE Assembly**

  - 23 voting members: 3 Presidents + 10 Regional Directors + 10 Division Directors
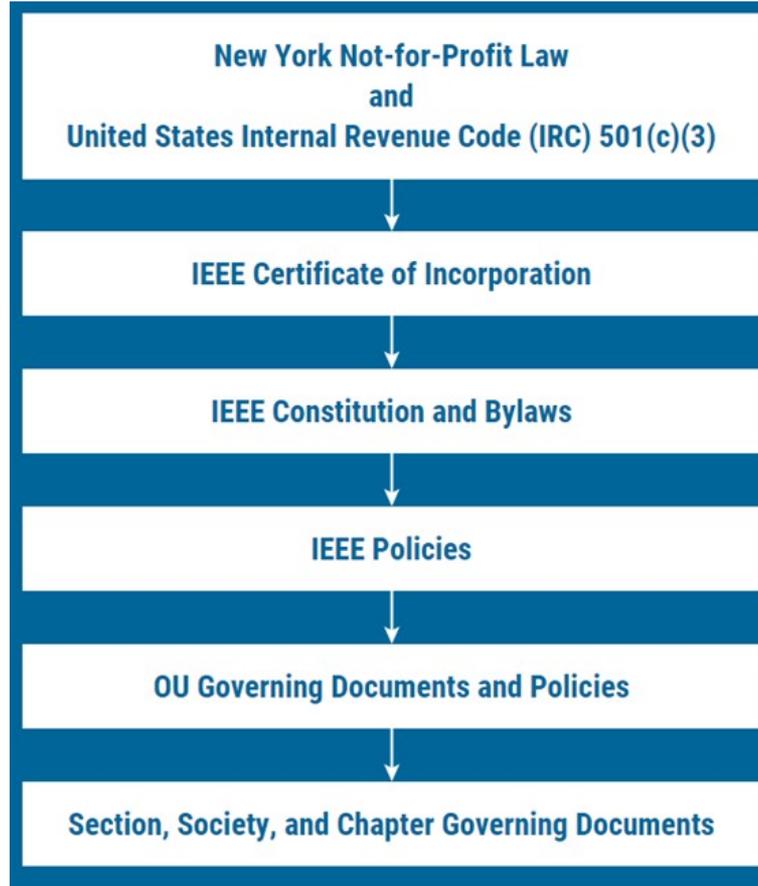
IEEE Governance

- **IEEE Major Boards** have elected volunteer leadership.
- Six subordinate boards govern major areas of IEEE interest:

  - **Member and Geographic Activities (MGAB),**

  - **Technical Activities (TAB),**

  - **Educational Activities (EAB),**

  - **Publication Services and Products Board (PSPB),**

  - **Standards,**

  - **IEEE-USA.**

- There are a number of **Committees** that report either to BoD or to the Boards.
- IEEE is governed by volunteers for volunteers, with the help of a reduced number of qualified staff members.

IEEE Governance

IEEE-USA
- Government Relations
- Government Fellows Committee
- Government Relations Council
- Career and Member services

TECHNICAL ACTIVITIES
- All Society Publications
- Conferences Committee
- Conference Events
- Conference Proceedings
- Chapters
- Future Directions Committee
- Societies, Councils and Technical Committees

STANDARDS ASSOCIATION
- Standard Working Groups
- IEEE Registration Authority
- Industry Standards & Tech Org (ISTO)

IEEE Global OU Structure:
Six Major Boards (OUs) defined in IEEE Policies with different responsibilities, but equivalent in our structure; no hierarchy of OUs defined in our governance

EDUCATIONAL ACTIVITIES
- Continuing Professional Education
- Engineering Accreditation Activities
- Pre-University Education

PUBLICATION SERVICES AND PRODUCTS
- IEEE Press
- IEEE Spectrum
- Proceedings of the IEEE
- The Institute

MEMBER & GEOGRAPHIC ACTIVITIES
- Regions, Sections, and Chapters
- Student Branches

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IEEE Governing documents

New York Not-for-Profit Law
and
United States Internal Revenue Code (IRC) 501(c)(3)

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IEEE Certificate of Incorporation

↓

IEEE Constitution and Bylaws

↓

IEEE Policies

↓

OU Governing Documents and Policies

↓

Section, Society, and Chapter Governing Documents

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IEEE OFFICE LOCATIONS

Corporate Headquarters:
New York, NY, USA

Operations Center:
Piscataway, NJ, USA

California Office:
Los Alamitos, CA, USA

Washington, D.C. Office:
Washington, DC, USA

IEEE India Office:
Bangalore, Karnataka, India

IEEE Asia-Pacific:
Solaris, Singapore

IEEE China Office:
Beijing, China

IEEE Japan Office:
Tokyo, Japan

IEEE Austria Office:
Vienna, Austria

3. Short overview of IEEE Region 8

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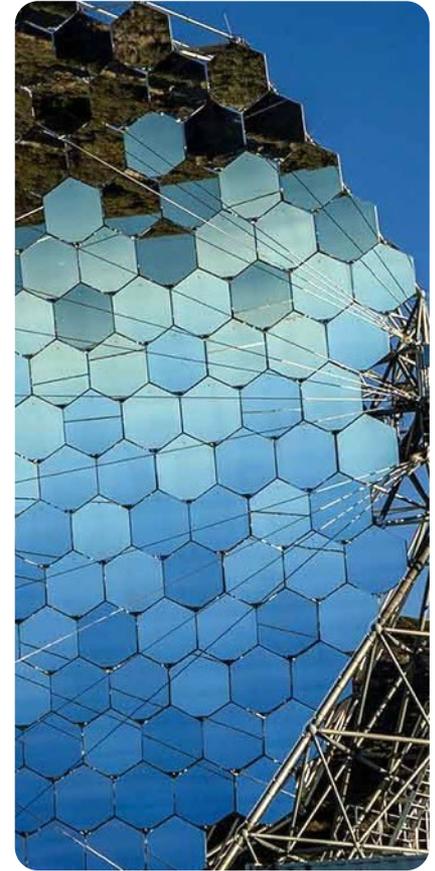
Region 8 covers Europe, Middle East and Africa

- Largest Region in terms of geographical extension.
- Probably in diversity is also the largest one.

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IEEE membership by Region

Legend:
- R1 (5%)
- R2 (4%)
- R3 (5%)
- R4 (3%)
- R5 (5%)
- R6 (8%)
- R7 (3%)
- R8 (18%)
- R9 (5)
- R10 (45%)
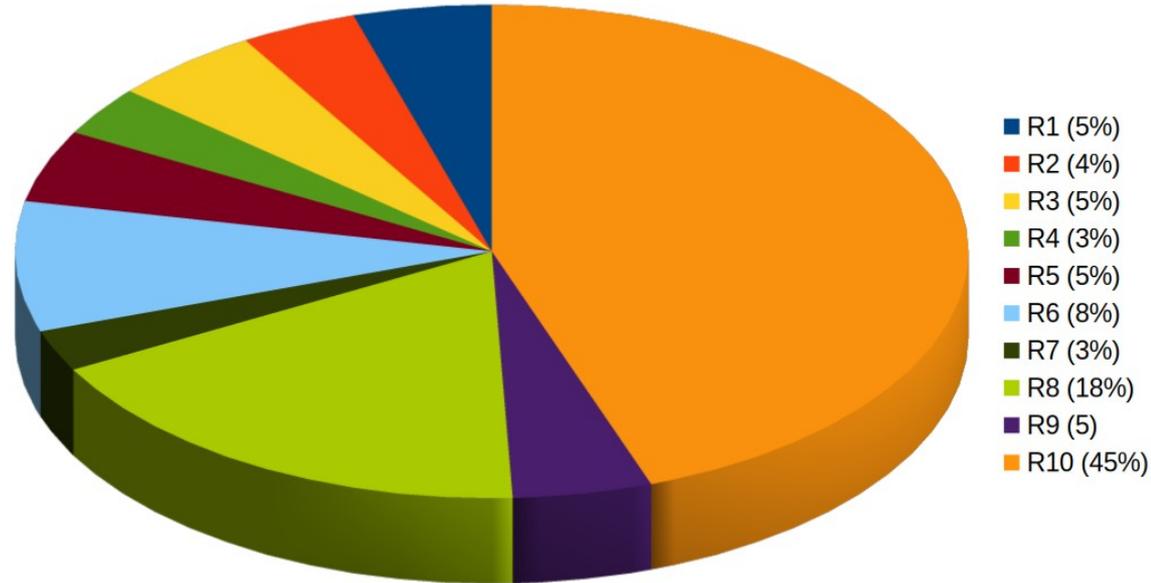
R8 is second largest in terms of number of members.

R8 organizational units

- 64 Sections
- 15 Subsections
- 1 Council: Africa Council
- 707 Society Chapters
- 118 Affinity Groups
- 856 Student Branches
- 880 Student Branch Chapters
- 259 Student Branch Affinity Groups
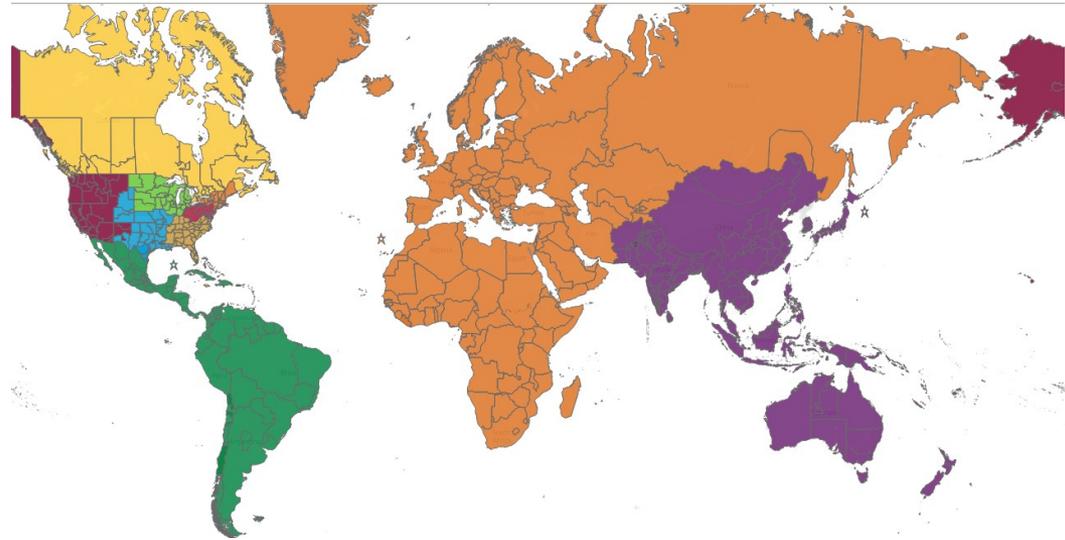
Data as of March 2026

IEEE Region 8 mission and vision

Mission

To serve the needs of the members of the Institute, the profession and society at large, by enhancing and supporting the IEEE's Organizational Units and their activities within Region 8.

Vision

Region 8 is an effectively organized, dynamic and influential entity, recognized as a leading and esteemed part of a truly transnational IEEE, with IEEE benefits equally available to all members.

Realizing the mission

- Provide a platform for coordination, motivation and interaction among Region 8 units.
- Provide a link between the Region and other IEEE organizational units.
- Work to achieve smooth and effective operations in different countries
- recognizing cultural differences, and
- effectively cooperating with national societies and other organizations.
- Expand IEEE presence and activities to new geographic areas in Region 8.
- Promote the transnational nature of IEEE within the Region and the Institute.

Region 8 Committee

- Composed by all Section Chairs, OpCom and non-voting members
  - https://ieeer8.org/category/committee/
- **Ultimate decision body for matters under Region responsibility**
- Conducts two annual meetings with the Region's leadership:
  - coordination of Region 8 business
  - training for new volunteers.
- Elects Vice Chairs, Secretary, Treasurer, Zone Representative, N&A members
- Determines the slate of candidates for Director-Elect
- Supports activities of local Organizational Units.
- Coordinates meetings for technical and professional purposes in the Region.
- Coordinates student, Young Professionals and Women in Engineering events.
- Coordinates activities between R8 entities and Organizational Units from outside the Region.
- Engages in member development.

2026 R8 Operating Committee (OpCom)

Dusanka Boskovic

Vincenzo Piuri

Marko Delimar

Ljupco Karadzinov

Adam Jastrzebski

Tiziana Tambosso

Habib Kammoun

Theodoros Chatzinikolaou

Abdullateef Aliyu

OpCom members

- **Director**: Dusanka Boskovic (Bosnia and Herzegovina)
- **Director-Elect**: Marko Delimar (Croatia)
- **Past-Director**: Vincenzo Piuri (Italy)
- **Secretary**: Ljupco Karadzinov (North Macedonia)
- **Treasurer**: Adam Jastrzebski (UK and Ireland)
- **Vice-Chair, Member Activities**: Habib Kammoun (Tunisia)
- **Vice-Chair, Student Activities**: Theodoros Chatzinikolaou (Greece)
- **Vice-Chair, Technical Activities**: Tiziana Tambosso (Italy)
- **Zone Representative**: Abdulateef Aliyu (Nigeria)

Africa Council

- Africa has 11 Sections, 4 Sub-Sections and more than 6,000 active members across the continent's 54 countries. Africa Council was approved in June 2018 and is now fully operational.
- Its primary responsibility is to be a centralized coordinating unit for IEEE activities in Africa. Other responsibilities are to provide:
- Guidance to the members on how to use IEEE's tools, products and network to enhance the engineer in Africa.
- A common voice for IEEE on the continent and provide an initial point of contact.
- Volunteer development training to grow IEEE's presence in Africa to benefit all volunteers.
- With the Africa Council, it is easier to identify solutions to problems in Africa. More importantly, African volunteers will get more opportunities to know themselves, network and share ideas and best practices for professional development.

R8 Conferences

Flagship conferences:
- MELECON: Biennial (even years), held in one of the Mediterranean Sections
- ENERGYCON: Biennial (even years), about energy topics, held anywhere in R8
- EUROCON: Biennial (odd years), held in a European Section
- AFRICON: Biennial (odd years), held in an African Section

Portfolio conferences:
- HISTELCON: Biennial (odd years), about history of electrical technologies, held anywhere in R8
- RTSI: Annual, Research and Technologies for Society and Industry Innovation, held anywhere in R8
- IHTC: Annual, Humanitarian Technologies Conference, held in R8, then in R7, then in R9

Additionally, over 300 IEEE conferences take place in Region 8 every year (some of them TCS)

R8 Conferences

Upcoming & Recent R8 Flagship and Portfolio Conferences:

- November 17-20, 2027, IEEE R8 IHTC 2027, 10th IEEE International Humanitarian Technology Conference, Zagreb, Croatia
- September 23-25, 2027, IEEE AFRICON 2027, 18th IEEE R8 AFRICON, Kumasi, Ghana
- September 6-8, 2027, IEEE RTSI 2027, 11th R8 Research and Technologies for Society and Industry, Catania, Italy
- June 9-11, 2027, IEEE EUROCON 2027, 22nd IEEE R8 International Conference on Smart Technologies, Sarajevo, Bosnia-Herzegovina
- November 25-27 2026, IEEE R10 HISTELCON 2026, 10th IEEE HISTory of ELectrotechnology CONference, Tokyo, Japan
- October 27-29, 2026, IEEE ENERGYCON 2026, 9th IEEE R8 International ENERGY CONference, Paris, France
- October 19-21, 2026, IEEE R9 IHTC 2026, 9th IEEE International Humanitarian Technology Conference, Guayaquil, Ecuador
- August 16-18, 2026, IEEE RTSI 2026, 10th IEEE R8 Research and Technologies for Society and Industry, Espoo, Finland
- February 2-4, 2026, 23rd R8 MELECON 2026, New Cairo, Egypt
- December 10-12, 2025, 17th IEEE R8 AFRICON, Polokwane, South Africa
- September 30 – October 2, 2025, IEEE R8 HISTELCON 2025, 9th HISTory of ELectrotechnology CONference, Bonn, Germany
- August 24-26, 2025, IEEE RTSI 2025, 9th IEEE R8 Research and Technologies for Society and Industry, Tunis, Tunisia
- August 13-15, 2025, IEEE R7 IHTC 2025, 8th IEEE International Humanitarian Technology Conference, Edmonton, Canada
- June 4-6, 2025, IEEE EUROCON, 21st IEEE R8 International European Conference on Smart Technologies, Gdynia, Poland

Interested in hosting an R8 conference in your Section? See the R8 Conference Coordination site

4. Overview of MGA

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Member and Geographic Activities (MGA)

- IEEE **Member and Geographic Activities (MGA)** is focused on supporting and meeting the members' needs and IEEE membership recruitment and retention strategies and implementation. IEEE local geographic organizational units (Sections, Chapters, Affinity Groups, and Student Branches) provide unique opportunities for members to attend technical presentations, create strong peer-to-peer connections, and participate in leadership opportunities that can make a positive distinction in IEEE members' jobs and careers.
- The **IEEE Member and Geographic Activities Board (MGA Board)** is responsible to the IEEE Board of Directors, has oversight of IEEE geographic organizational units, and is responsible for IEEE membership and member development.

Member and Geographic Activities (MGA)

- **MGA's mission:**

  - **I**nspire, **E**nable, **E**mpower and **E**ngage Members of IEEE.

- For the purposes of:

  - Fulfilling the mission of IEEE,

  - Enhancing the members growth and development through their life cycle,

  - Providing a professional home.

- **MGA vision**

  - Ensure quality member opportunities for continuous engagement.

https://mga.ieee.org

Member and Geographic Activities (MGA) Board

MGA Board Members

- Voting members
    - 10 Region Directors
    - MGA Vice President (Chair): Drew Lowery (R2)
    - MGA Vice President Elect: Eric Grigorian (R3)
    - MGA Past Vice President: Antonio Luque (R8)
    - MGA Treasurer; Greg Gdowski (R1)
    - 3 Vice Chairs (Geo Unit Ops, Info Management, Member Activities)
    - 2 Zone Representatives (Regions 8 & 10)
- MGA Staff Secretary (non-voting)

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The MGA Board and Committees

MGA VP	MGA Secretary	MGA Staff

Vice Chair Member Development	Vice Chair Geographic Unit Operations	Vice Chair Information Management	MGA Past Chair	MGA VP-Elect	MGA Treasurer

Vice Chair Member Development
- Member Engagement and Life Cycle Committee
- IEEE Admission and Advancement Committee
- Awards and Recognition Committee
- IEEE Life Members Committee
- Membership Recruitment and Recovery Committee
- Student Activities Committee
- IEEE Women in Engineering
- IEEE Young Professionals Committee

Vice Chair Geographic Unit Operations
- Geographic Unit Operations Support Committee
- MGA/TA Chapter Support Committee

Vice Chair Information Management
- IT Coordination and Oversight Committee
- vTools Committee

MGA Past Chair
- Strategic Planning Committee
- Operations Manual Compliance Committee

MGA VP-Elect
- Nominations and Appointments Committee
- Operations Committee
- Finance Committee
- Member Benefits Portfolio Advisory Committee
- Potentials Editorial Board
- Sections Congress Committee
- Training Committee

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MGA Department (Staff)

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                          Cecelia
                          Jankowski
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Michael Kreisberg Member Experience	Vera Sharoff Information Management	Christie Giambalvo Geographic Activities	Matt Plotner Member Operations	Lori Keller MGA Finance
Contact Center Member Dev/Mkt Member Products Member Data/Research Membership year Affinity Groups Events (Xtreme, IEEE Day, WIE ILC)	vTools Requirements (Member, Web) OU Analytics Tools/platforms eNotice Membership infrastructure support Data Privacy/GDPR	Geographic Unit Activities & Operations MGA Board Admin MGA Conferences Volunteer Training Awards Ethics/Compliance Sections Congress	Membership Processing & Payments Geo Unit Formations Senior Member Elevations IEEE Fellow Process & Committee Support	MGA Finances Geo Unit Finances MGA Conference Finances

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Geographic Unit Operations Resources

www.ieee.org/societies_communities/geo_activities/resources

- IEEE Center for Leadership Excellence –
  Training for Geographic Unit Leaders (https://ieee-elearning.org/CLE/).
- Required reporting for Geographic Units.
- IEEE Organization Roster (www.ieee.org/roster).
- IEEE e-Notice (www.ieee.org/enotice).
- OU Analytics (www.ieee.org/samieee).
- vTools (vtools.ieee.org).
- Request for letter to employer.

- Formation and Petitions, Section Bylaws and Addendums, Affinity Groups, Chapters, Ordering products.

Sections Congress

- IEEE Sections Congress is a triennial gathering of Section leadership sponsored by the Member and Geographic Activities (MGA) Board.

- It is the one major meeting sponsored by IEEE that brings together the grassroots leadership of IEEE so that they can share ideas, concerns, and solutions.

- It is also a forum where the Section Chairs speak as the collective voice of IEEE members, expressing ideas about how IEEE can better serve its members, both now and going forward. The issues generated at Sections Congress have had a major impact on the plans made by the IEEE leadership for the future of IEEE.

- It involves hundreds of delegates from all ten Regions who have a unique opportunity to learn how to utilize the resources of IEEE to maximize their effectiveness as IEEE volunteer leaders.

IEEE SECTIONS CONGRESS 2026
Leading Technology for Global Good

Sections Congress

- With workshop, panel, and tutorial sessions held on topics of interest to the Sections during several days of working sessions and networking.

- **Each Region prepares recommendations that are voted by all Sections Congress delegates. The top three are considered by MGA and IEEE for their plans.**

- Recent Sections Congress:

  - Sections Congress 2020 virtual

  - Sections Congress 2023 in Ottawa (Canada), August 2023

- Next Sections Congress: 21-23 August 2026 in Glasgow, UK (Region 8)

  - http://sections-congress.ieee.org/

IEEE SECTIONS CONGRESS 2026
Leading Technology for Global Good

Section rebates

- All Sections in existence on 31 December and meeting minimum requirements receive a

  - USD 2,000 annual allowance.

  - USD 3 for each Member, Student, or Associate grade member,

  - USD 1.50 for Affiliate,

  - USD 4 for Senior or Fellow Grade member.

  - USD 200 for each Chapter and/or Affinity Group meeting minimum requirements.

- 10% bonus of total rebate to sections who report (financial, meeting, and officer) by deadline.

- Minimum 5 meetings per year and 50 HGM.

Section rebates

Note: must comply with annual reporting, activity and election requirements

Organizational Unit	Section	Subsection	Chapter	Affinity Group (AG)	Geographic Councils that are the parent of active Chapters & AGs	GEO Units outside of a Section	Student Branches
Allowance	$2,000	$500.00	$200.00	$200.00	$200/unit	$200.00	US$50.00 for Branches with fewer than fifty (50) IEEE Student Branch members and (US$100.00) for Branches with fifty (50) or more IEEE Student Branch members
Membership	$3/member						US$2.00 per Student Branch member
	$1.5/affiliate						US$1.00 per Student Branch Chapter member
	$4/Sr Member or Fellow						
	$3 Associate member						
Meetings	$3/Student or Grad student member (if belong to Student Branch)						
	5 or more (Chapter and/or Affinity Group meetings may be counted in fulfilling Section meeting requirements)	5 or more	2 or more technical	2 or more		2 or more	4 or more
Members		15 or more				50 or more	
Timeliness Bonus	10%				10%		
Activity Bonus (meetings, money)	10 or more, $200 (5 technical)	10 or more, $100 (5 technical)	6 or more, $75 (all technical)	6 or more, $75	Refer to chapter and AG requirements	6 or more, $75	

Section activity and reporting

- 1. Annual financial reports by the 28th of February, of each year

  - a. Student Branch and Student Branch Chapter financials are to be reported to their parent Geographical Unit

- 2. Annual officer reports by the 15th of March, of each year

- 3. Annual meeting reports by the 15th of March, of each year

- 4. **Annual report of Section elections by the 15th of March, of each year (NEW)**

Sections are required to conduct elections in compliance with the MGA Operations Manual, Section 9.13, and annually report that elections have been completed. **The full Section rebate amount, base and per member rebate, will be withheld for any Section that does not hold elections in compliance with the MGA Operations Manual**. Exceptions for payment of the dues rebate shall be at the discretion of the Region Director.

◆IEEE

MGA Operations Manual

1. Introduction
2. Member and Geographic Activities Board
3. MGA Financial Matters
4. MGA Committees
5. MGA Operations Committee
6. MGA Assembly
7. MGA Nominations and Appointments Process
8. Member and Geographic Activities Awards
9. **Geographic Organizational Units**
10. **Conferences**
11. MGA Publications
12. Revisions to the MGA Operations Manual

5. Running a Section successfully

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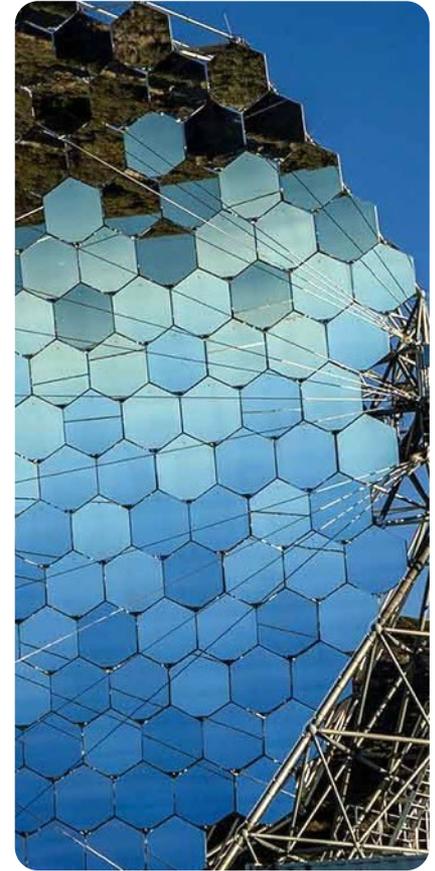
Region and Section vitality

Main goal is to have vital sections and subsections serving their members:

- successful operation
- timely reporting (officers, meetings, and financials) to receive their rebates
- successfully retaining and recruiting members,
- training new volunteers and
- holding elections on time following the MGA Operations Manual.

What a Section Chair does

- Runs the Section
- Find future leaders
- Is a role model
- Inspires and mobilizes people
- Organizes Administrative board meetings
- Supports other activities:
  - Professional,
  - Technical,
  - Non-technical (including social).
- Reports new officers – important!. So they receive e-mail, info material, and so on.

Elections

- Elections for all officers shall involve all voting members and **use vTools** to support the voting

- All officers shall be elected **every year** or **every two years** (as approved by Section ExCom and documented in local operating procedures). If unsure it is two years.

- Term of office is **1 January to 31 December**,

- An officer should **not** serve in the same position for **more than four consecutive years**, or for **more than six years in total**.

  See MGA Operations Manual, Section 9.5.F

Elections

As of February 17, 2024, the IEEE Member and Geographic Activities (MGA) board has implemented a simplified, mandatory election process for Geographic Units (Sections, Chapters, and Affinity Groups) to ensure compliance with the MGA Operations Manual.

Key Updates & Mandatory Process (Effective 2024)

- Electronic Voting Required: **All elections must use vTools Voting**, eliminating in-person or mail ballots except for approved exceptions.

- **Election Committee**: Nominations and Tellers Committees are now combined into a single "Election Committee." While one current officer can be on this committee, they cannot be the Chair.

- Timeline Requirements:

  - **Call for Nominations**: Minimum 30 days.

  - **Petitions & Endorsements**: Recommended minimum 30 days.

  - **Voting Period**: Minimum 2 weeks.

- Voter Eligibility: Member eligibility for voting is based on being active as of 30 June of the election year.

Section Vitality Checklist

From MGA Operations website.

First Quarter of the Year (January – March)
- Complete and submit all IEEE mandated documentation (e.g. Meeting Reports, Financials (NetSuite/ L50) to close the previous year.
- Report all Section Officers, Affinity Group, Chapter, and Student Branch Chairs.
- Update Section website.*
- Does your Section have Social Media presence (Facebook, Instagram, etc)
- Train new officers through the Center for Leadership Excellence.
- Are you familiar with vTools?
- Promote use of Section Vitality Dashboard, vTools and SAMIEEE. *
- Review /Update local operating procedures.
- Plan and budget for Section, Chapter, and Affinity Group activities for the year.
- Organize a workshop for Chapter and Affinity Group Chairs.
- Conduct joint meeting with student branches, e.g. technical presentation, Student Professional Activities Conference (S-PAC).
- Reach out to non-renewing members before the deactivation date (end of February)
- Review meeting reporting on vTools for all local units and bring it up to date

Section Vitality Checklist

Second Quarter of the Year (April-June)

- Conduct a Membership Development activity (e.g. membership recruitment or elevation meeting). Half-year dues cycle starts in March. Contact deactivated members and ask them to renew.
- Conduct Professional Development Activities (e.g. workshop/seminar).
- Conduct a Continuing Education activity.
- Establish a plan for engaging with members in industry.
- Communicate with section members on IEEE activities (e.g. webinar).
- Engage with Regional Leadership and activities (e.g. attend annual regional meeting).
- Review Affinity Group and Chapter activities to ensure continuity.
- If there are no affinity groups or chapters in the Section, strive to form one using SAMIEEE to gauge members' interests.*

Section Vitality Checklist

Third Quarter of the Year (July-September)

- Promote a pre-university activity in your area (e.g. TISP, science fair judging).*
- Conduct a Career Workshop (e.g. resume writing, employment network).*
- Submit nominations for awards (e.g. MGA, TA, and Region). Solicit nominations for Section Awards.
- Establish partnership with industry (e.g. joint technical presentation/training).*
- Conduct joint meeting with student branches (e.g. student training, STEP event).
- Support an affinity group function in conjunction with the section.
- Recruit new volunteers.*
- Solicit nominations for leadership roles for the upcoming year and develop the slate for elections.

Section Vitality Checklist

Fourth Quarter of the Year (October-December)

- Encourage members to renew
- Conduct an event to support involvement with local industry.*
- **Hold Officer Elections.**
- Share and collaborate on humanitarian/community engagement projects.*
- Conduct a Membership recruitment event (e.g. social event).
- Organize an Annual Dinner with Section Awards.
- Communicate with the Section membership and announce new officers
- Are elections held annually?
- Did you have an election in the last 2 years?

Conferences

Sections can sponsor or co-sponsor conferences. The Section is to sign a Memorandum of Understanding with the other parties.

Record the decision to sponsor in the Section's meeting minutes. Review the application for sponsorship to make sure that the conference is a success and the quality is high.

The Section must participate in the conference to gauge quality.

Note the difference between Financial (Co-)Sponsorship and Technical Co-sponsorship.

If the Section needs advice, contact Region 8 Conference Coordinator.

Conferences

Remember that for all conferences in which an MGA Geographic Unit is a technical co-sponsor and there is no IEEE financial sponsorship, the MGA TCS Fee policy shall apply.

- This fee is $1500 per TCS conference, and $22 per paper sent to IEEE Xplore.

- If multiple IEEE Organizational Units (OUs) technically co-sponsor the same conference, the fee will be divided equally between all IEEE sponsors(i.e.: Society, Council, MGA Geographic Units).

- MGA Geographic Units will have the option to bill the TCS fees directly to the Conference.

6. Volunteer tools

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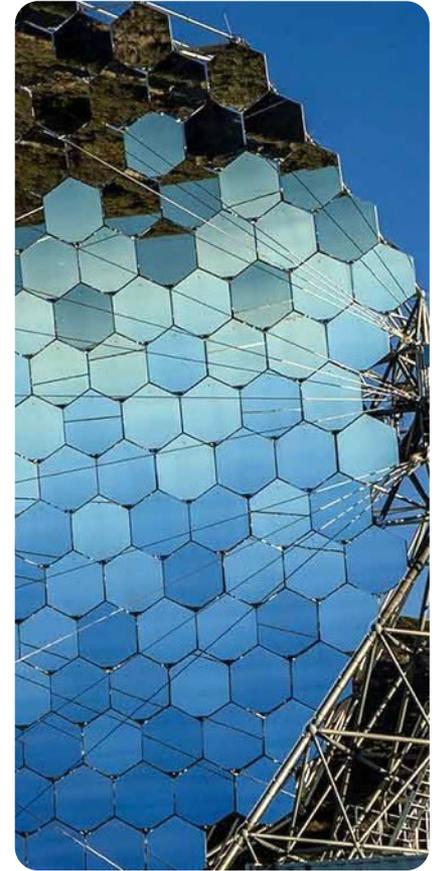
Volunteer Tools & Member Platforms

IEEE vTools

OU Analytics

CLE – Center for Leadership Excellence

Volunteering Platform

Collabratec

MGA volunteer hub

The Volunteer Hub contains the set volunteer tools and links on the one page https://mga.ieee.org/volunteer-hub

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OU Analytics

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OU Analytics

Page "Access IEEE OU Analytics" https://mga.ieee.org/volunteer-hub/volunteer-tools/ou-analytics

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OU Analytics

▶ **Memberships and statistics**
- Numbers and details of members
- Subscriptions and membership
- Year Over Year Comparison (Geographic Membership Statistics Dashboard).

▶ **Volunteers**
- Officer history
- All current officers (Geographic roster).

OU Analytics demo (if time allows)

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Classification of documents

As an educational, scientific and charitable organization dedicated to the benefit of the public, IEEE recognizes and endorses the fundamental importance of transparency and accountability in all its activities. Accordingly, it is IEEE's policy to be open about its activities and to welcome and seek out opportunities to explain its work to the widest possible audience. (IEEE Policy 9.25.1)

IEEE's information disclosure policy has two objectives:
▶ To increase the flow of information among volunteers and staff
▶ To protect the small amount of information that requires protection

An information disclosure policy necessarily exists between two needs:
▶ Should the information be disclosed to provide benefit to the public, to fulfill the members' right to know, and to provide the information needed for everyone to do their jobs?
▶ Should the information be protected to preserve competitive advantages, to fulfill legal obligations, and to protect privacy?

Every person in the IEEE community needs to be mindful of both sets of needs and apply judgment to find the right balance. This document is intended to provide assistance in making those informed decisions.

Full reference at the IEEE Guide to Information Classification and Disclosure.

Classification of documents

IEEE documents are classified among
► Unclassifed
► IEEE Proprietary
► IEEE Confidential
► IEEE Confidential – Controlled distribution

Remember to mark your documents with the appropriate level of classification.

Classification of documents

	Unclassified	IEEE Proprietary	IEEE Confidential	IEEE Confidential-Controlled Distribution
Frequency of use	The norm	Common	Infrequent	Rare
Characterization	IEEE products, public communication, and records of volunteer activities		Information that adversely affect the business operations, privacy commitments, or legal obligations of IEEE if disclosed	Information that, in accordance withlaw, bylaws, policies, or procedures shallbe restricted to a defined list of individuals
Availability	Available to the non-member—may be subject to copyright, fees, etc.	Available to all IEEE staff and members	Available to all IEEE staff and Authorized Volunteer Leaders with a need-to-know	Availability limited to those on the distribution list. May not be redistributed.
Examples (See § 7)	Business cards, products, publications, price lists, annual report	Organization charts, financial data, statistical abstractions of higher-classified data	R&D plans, product strategies, consideration of policy changes, compilations of lower-classified data	Most personnel information, negotiable prices and terms, trade secrets and patents, executive session minutes, mergers, acquisitions, and other corporate restructurings

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IEEE branding

The **IEEE Brand** is expressed through every point of interaction a person has with IEEE, from the brochure members read before they join to the conversations with volunteers or staff at an IEEE conference. It is more than just a logo—or in IEEE's case, the **IEEE Master Brand**. Brand value is measured by how others feel about IEEE, and it is realized through every connection a person has with IEEE.

However, brand identity begins with what they see, and consistency builds trust. That's why it is important to always follow the **Brand Identity Guidelines** which outline how to use the visual elements of the IEEE brand, including the **IEEE Master Brand (logo) and Sub-Brand Architecture**.

The IEEE Brand Experience website contains lots of useful tools, templates and promotional material for IEEE

Our brand is much more than our logo

What is our brand?

The IEEE brand is an authentic reflection of who we are and what we value.

The brand is expressed through every point of interaction a person has with IEEE, from the brochure members read before they join, to the conversations with volunteers or staff at an IEEE conference. It is reflected in every IEEE e-mail and phone call our members receive, every Web page with the IEEE logo, and every article in the IEEE *Xplore*® digital library.

IEEE brand touch points

IEEE Web sites	conferences	social media	global offices	members
volunteers	societies	training	marketing	outreach
e-mail blasts	IEEE *Xplore*	collateral	brochures	employees
sections	standards	university events	presentations	local activities
regions	elevator speech	badges	contact center	signage
Fellows	awards	e-mail addresses	milestones	word of mouth
publications	media coverage	business cards	merchandise	and more...

What other IEEE brand touch points come to mind?

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We want our brand to be universally recognized

Consistency builds trust

Brand value is achieved by how others feel about IEEE; however, brand identity begins with what they see.

A consistent brand identity is imperative to success. To ensure our brand identity remains consistent and is a reflection of who we are, IEEE has created brand identity guidelines that still allow for flexibility within the IEEE brand experience. Following these guidelines will strengthen our brand promise—allowing IEEE to be universally recognized and trusted around the world, for years to come.

Our brand identity elements

| IEEE logo | Color palette | IEEE wedge | Imagery | Typography |

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The IEEE identity

IEEE Master Brand

Font Family

Formata
Calibri
Open Sans

Adobe Caslon Pro
Cambria

Color Palette

Imagery

IEEE Wedge System

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IEEE master brand

IEEE Master Brand without tagline

The IEEE Master Brand consists of the IEEE diamond-shaped icon (the "kite") followed by the letters I-E-E-E.

IEEE Master Brand with Tagline

The IEEE Master Brand with the tagline is recommended for use on all corporate-level materials.

The IEEE "kite"

The IEEE "kite" can only be used on its own for membership grade indicators (e.g., pins, digital badges, etc.). Direct all questions regarding individual uses cases to the IEEE Brand team.

NO ✗
Do NOT use the kite symbol on its own. The kite symbol and letters I-E-E-E MUST stay together.

NO ✗
Do NOT fill in the inside of the kite symbol.

NO ✗
Do NOT use any parts of the kite symbol or IEEE Master Brand as separate icon elements.

NO ✗
Do NOT place another graphic or icon inside of the kite symbol.

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IEEE tagline

IEEE Tagline Usage

The IEEE tagline, *Advancing Technology for Humanity*, was created in 2009 to commemorate the 125th anniversary of the organization. These four words reflect the IEEE mission and vision, positioning statement, and brand promise. The IEEE tagline can not be altered in any way.

YES ✔
Approved IEEE Master Brand with tagline variation.

YES ✔
The only approved exception (shown above) is as text, such as when the tagline is used in an email signature. A colon must separate the "I-E-E-E" from the tagline, "Advancing Technology for Humanity."

Incorrect Usage

NO ✗
Do NOT alter the IEEE tagline in any way. It can not be applied to any sub-brand logo, nor can a variation of this tagline be used.

NO ✗
Do NOT use the IEEE tagline when another logo or brand mark with tagline exists. In this case, the IEEE Master Brand without tagline should be used instead.

NO ✗
Do NOT alter or change the prescribed size and position of the IEEE tagline when using the IEEE Master Brand with tagline variation.

NO ✗
Do NOT use the IEEE tagline treatment from the IEEE Master Brand without the kite and I-E-E-E.

NO ✗
Do NOT apply the tagline to any sub-brand or external logo or mark.

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IEEE master brand

Background Control

Maintain maximum visibility by keeping a high contrast between the background and IEEE Master Brand. Use the blue or black IEEE Master Brand on a light background. Use the white IEEE Master Brand on a dark background. When placing the IEEE Master Brand over an image, adjust the position of the image or retouch the area as needed to maintain maximum visibility.

YES ✔
Blue IEEE Master Brand on a light background.

NO ✗
White IEEE Master Brand on light background with insufficient contrast.

YES ✔
Black IEEE Master Brand on a light background.

YES ✔
White IEEE Master Brand on a dark background.

NO ✗
Black IEEE Master Brand on a dark background.

NO ✗
IEEE Master Brand on a complicated background.

Incorrect Usage

IEEE Master Brand configurations and usage outside of established specifications and guidelines damage the IEEE Brand and can reduce its value over time. Modifications and/or distortions are strictly prohibited.
The IEEE Master Brand can only be reproduced in IEEE blue, black, or white.

NO ✗
Do NOT rearrange, reconfigure, or change the size.

NO ✗
Do NOT distort, stretch, or manipulate.

NO ✗
Do NOT rotate or place at an angle.

NO ✗
Do NOT change colors.

NO ✗
Do NOT use graphic effects or outlines.

NO ✗
Do NOT add lines above or below or put in a container shape.

NO ✗
Watermarks are only permitted on video applications. All other uses are prohibited.

NO ✗
A pattern is only permitted on a step-and-repeat banner. All other uses are prohibited.

NO ✗
Do NOT crop out the kite and use the letters "I-E-E-E" on their own.

NO ✗
Do NOT fill in the inside of the kite symbol.

NO ✗
Do NOT use the kite symbol on it's own. The kite symbol and letters I-E-E-E MUST stay together.

See the IEEE Brand Identity guidelines

Social media

IEEE Master Brand Placement
Social Media

IEEE encourages the use of social media to engage our target audiences. When using an IEEE brand on social media, ensure the following:

- Make sure that the IEEE Master Brand, sub-brand logos, and/or tagline (if used) are legible when resized for mobile optimization.

- Make sure that any Bio/About information for IEEE is consistent across all platforms.

Be sure to review the IEEE Social Media Policy and Guidelines, which pertain to any IEEE employees, volunteers, vendors, consultants, and/or contract workers when using social media for, on behalf of, or when it could be perceived to be on behalf of or affiliated with IEEE.

Additional social media resources are available, including toolkits, training materials, and profile registry.

Follow IEEE on social:

Social Media Post Examples

See the IEEE Brand Identity guidelines

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Geographic communities

Endorsed Branding

Geographic Communities

Regions/Sections/Chapters

(Includes sub-sections and professional chapters)

Each sub-brand uses the letters I-E-E-E differently, but all communities should leverage the IEEE Master Brand in their communications.

The IEEE Master Brand is NOT to be used inside or as part of another mark.
Geographic units are encouraged to use the approved sub-brand treatments. The IEEE wedge element and lockups are permitted. IEEE approved sub-brand treatments are available for each Region, Section, Sub-section, Chapter, and Affinity or Special Interest Group.

Brand Alignment

- Member outreach at both the local and global level

Regions/Sections/Chapters includes:

- IEEE geographically-based communities of the world

See Sub-brand Design Requirements

Section Website

Digital Graphic

Newsletter

IEEE Northern Australia Section

Upcoming IEEE Events
For all Northern Australia Chapters and Affinity Groups

VIRTUAL EVENTS THIS WEEK
SEPT 9 - SEPT 13
IEEE REGION 4
IEEE Region4

IEEE Madras Section
NEWS LETTER
VOL 21:5

Digital Graphic

IEEE Region 10 Women in Engineering
IEEE Region 10 Women in Engineering Awards 2024
@ieee10wie

Digital Graphic

CENTRE FOR INTELLIGENT SYSTEMS | TALTECH   IEEE youngprofessionals Estonia Section
THE RISE OF INTELLIGENT VIRTUAL WORLDS:
How AI Could Revolutionize Virtual/Extended Reality
Dr. Ali Geriş & Dr. Murat Kilinç
May 5, 2023, 10.00–12.00
TalTech ICT-411, Akadeemia tee 15a & Online

Social Post

ExCom Meeting & Chapters Summit '23
IEEE
PORTUGAL SECTION

Digital Graphic

IEEE Region 5
We are ONE IEEE
ANNUAL REGION MEETING & STUDENT COMPETITIONS
MARCH 28 - 30, 2025 | WICHITA, KANSAS

Reminder:
Some examples shown include images without the IEEE Master Brand. However, the IEEE Master Brand should always be present in all IEEE-branded printed and digital materials.

IEEE

Geographic communities

Download your Section flag!

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7. Region 8 Committee meetings

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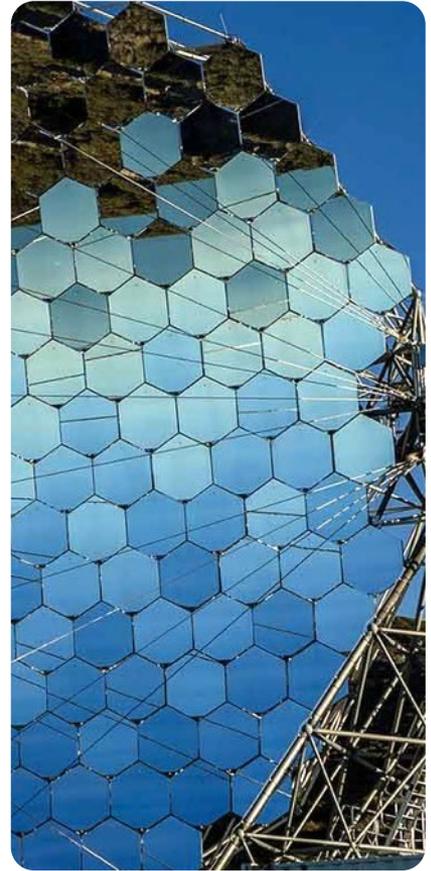
A typical R8 Committee meeting

What will happen tomorrow?

Committee members are the real stars of the meetings. Everything will be presented, reported, or asked to you.

During the meeting you can expect reports from the different R8 officers and committees; presentations from invited IEEE leaders and staff; healthy discussion about matters pertaining to the Region, the Sections or the members.

The Region Director will chair the meeting and will take care of the order, timing, and progress of items.

Don't be shy! Participate, share your opinion and listen to others!

How is the meeting organized

The meeting will start with a **roll call**, when everybody in the room is asked to identify themselves.

The meeting has an **agenda**. At the beginning you will be asked to approve it. The agenda has been posted at the meeting page on the R8 website.

Then you will be asked to approve the **consent agenda**. The items there are supposed to be of non-controversial nature. But everybody is entitled to take items out of the consent agenda. If you feel that something needs to be discussed, just raise your hand at this moment.

Then the next items in the agenda will follow, starting with the welcome from the Director and the local Section Chair. **Rules of order will be followed**.

There will be **breaks**. Make use of them to know and interact with the rest of the people.

After the meeting on Saturday there will be a **social event**, and the meeting will continue until **Sunday before lunch**.

Seating

A typical R8 meeting seating arrangement

| OpCom | Speaker |

Section Chairs

Committee members

Guests

Staff
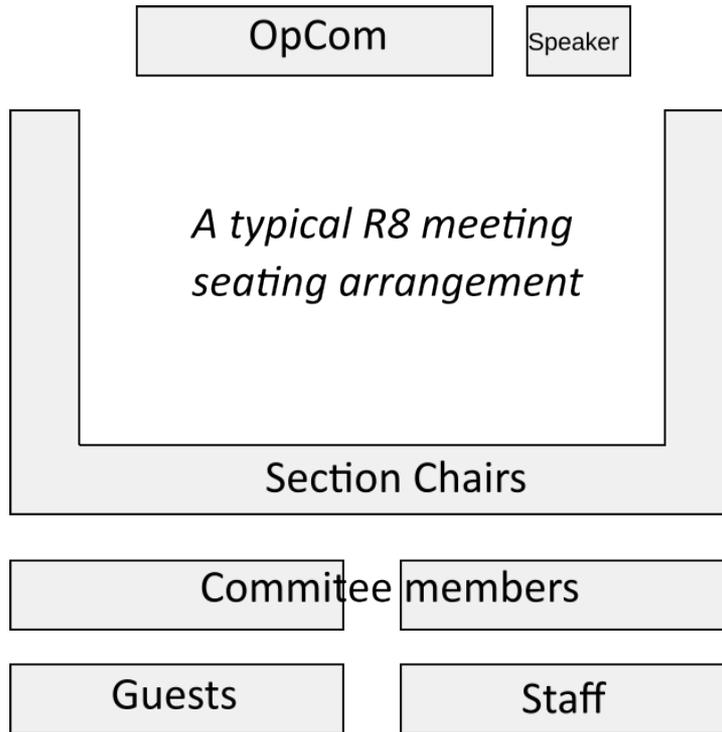
Seating is predetermined.

Motions

A motion is a request for the body (the R8 Committee) or some of its members (committees, appointed persons, officers) to do something. As such, a motion always has to have an element of action.

Motions will be presented, discussed and voted.

Any member has the right to propose or discuss a motion. Only those with voting rights will be allowed to vote.

More on motions later.

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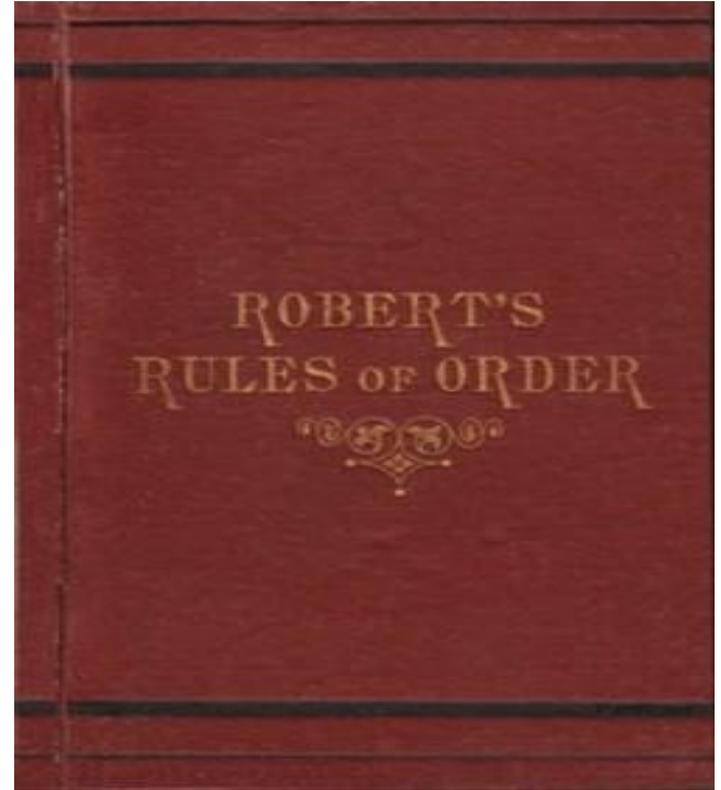
Rules of order

Rules of order, also known as **standing orders** or **rules of procedure**, are the written rules of parliamentary procedure adopted by a deliberative assembly, which detail the processes used by the body to make decisions.

IEEE Bylaws I-300. Management

       Robert's Rules of Order shall be used to conduct business at meetings of the IEEE Board of Directors, Major Boards, Standing Committees and **other organizational units** of the IEEE unless other rules of procedure are specified in the Not-For-Profit Corporation Law of the State of New York, the IEEE Certificate of Incorporation, the IEEE Constitution, these Bylaws, the IEEE Policies, resolutions of the IEEE Board of Directors, or the applicable governing documents of those organizational units provided such organizational documents are not in conflict with any of the foregoing.

Origins

- Henry Martyn Robert:
  Pocket Manual of Rules of Order for Deliberative Assemblies, February 1876.
- Loosely modelled after rules used in the United States House of Representatives.
- Robert was an active member of several organizations. To help simplify and organise meetings, he decided to write a manual that would enable organizations to adopt a parliamentary procedure.

Rules of order in the R8 Committee

- **All members of the Committee have equal rights** to participate and take part in debate, except that non-voting members do not have the right to vote.
- Substantial parts of a meeting are organised in an **informal way**.
- Formal parts of meetings are normally conducted in accordance with **Robert's Rules**.
- Robert's Rules are not well known in the countries of Region 8, it cannot be assumed that the R8 Committee members have more than a superficial familiarity with these rules, and this must be allowed for in the conduct of the meetings.
- **The Chair** should enable an orderly debate to take place on all issues, and allow equal and fair rights to all members of the Committee.
- During formal debates, **the Chair must take a neutral position** and may only vote in the case of secret vote or to break a tie.

Main ideas in RROO

► Rules of order are used to **simplify** the parliamentary procedure, **not to complicate** it.

► **Everyone has the right to speak** once if they wish, before anyone may speak a second time.

► Everyone has the right to know **what is going on** at all times.

► Only **urgent matters may interrupt** a speaker.

► The members discuss **one thing at a time**.

The basics of the rules

▶ **One thing at a time.** Only one main motion is allowed on the floor at a time, but there is a system to put that motion aside if something more urgent comes up.

▶ **One person, too.** Only one person may talk at a time.

▶ **And only one time per meeting**. The same motion (or practically the same) can not be made more than once per session; the only exception is if a member changes his or her mind.

▶ **Enough of us have to be here to decide**. The group determines the minimum number of people (called a quorum) that must be present to make a decision for the whole group.

Nancy Sylvester, "The complete idiot's guide to Robert's rules,"
ISBN 1-59257-163-8, Alpha, Indianapolis, IN, 2004.

The basics of the rules (cont.)

▶ **Protected even if absent**. The rights of the members who are absent are protected.

▶ **Vote requirements are based on members' rights**. The determination of what kind of vote is needed (such as majority, two-thirds, …) is based on members' rights. If an action gives rights to the members, it requires a majority vote to pass. If an action takes away rights from members, it requires a two-thirds vote to pass.

▶ **Silence = consent**. ~~If a member chooses to abstain from voting, that member is giving his or her consent to the decision made by the group.~~

▶ **Everybody is equal**. All voting members have equal rights. The majority rules but the minority has the right to be heard and to attempt to change the minds of the majority.

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How to do things

You want to bring up a new idea before the group.

▶ After recognition by the chair, <u>present your motion</u>.

▶ A second is required for the motion to go to the floor for consideration (and the motion now belongs to the body).

You want a motion just introduced by another person to be killed.

▶ Without recognition from the chair, state "I <u>object to consideration</u>."

▶ This must be done before any debate.

▶ This requires no second, is not debatable and requires a 2/3 vote.

You want to change some of the wording in a motion under debate.

▶ After recognition by the chair, <u>move to amend </u>by adding words, striking words or striking and inserting words.

▶ This may be recognised as a **friendly amendment** by the person (or body) who proposed the original motion.

How to do things

**You like the idea of a motion under debate,
but you need to reword it beyond simple word changes.**

▶ <u>Move to substitute your motion</u> for the original motion.

▶ If it is seconded, debate will continue on both motions and eventually the body will vote on which motion they prefer.

You feel the motion addresses two or more separate issues.

▶ <u>Move to divide the question</u>.

You want more study and/or investigation given to the idea under debate.

▶ <u>Move to refer to a committee</u>.

▶ Be specific as to the charge to the committee.

You want more time personally to study the proposal under debate.

▶ <u>Move to postpone</u> to a definite time or date.

How to do things

You want to postpone a motion until some later time.

▶ <u>Move to table</u> the motion.

▶ The motion may be taken from the table after one item of business has been conducted.

▶ If the motion is not taken from the table by the end of the next meeting, it is dead.

You have heard enough debate.

▶ <u>Move to call the question</u>; this cuts off debate and brings the assembly to a vote on the pending question only.

▶ Requires a 2/3 vote.

You want to take a short break.

▶ <u>Move to recess</u> for a set period of time.

You want to end the meeting.

▶ <u>Move to adjourn</u>.

How to do things

You are unsure that the chair has announced the results of a vote correctly.

▶ Without being recognized, call for a "<u>division of the house</u>."

▶ At this point a standing vote will be taken.

You are confused about a procedure being used and want clarification.

▶ Without recognition, call for "<u>Point of Information</u>" or "<u>Point of Parliamentary Inquiry</u>."

▶ The chair will ask you to state your question and will attempt to clarify the situation.

You have changed your mind about something that was voted on earlier in the meeting for which you were on the winning side.

▶ <u>Move to reconsider</u>.

▶ If the majority agrees, the motion comes back on the floor as though the vote had not occurred.

Summary of RROO

You may INTERRUPT a speaker for these reasons only:
▶ to get information about business – **point of information**
▶ to get information about rules – **parliamentary inquiry**
▶ if you can't hear, safety reasons, comfort, etc. – **question of privilege**
▶ if you see a breach of the rules – **point of order**
▶ if you disagree with the chair's ruling – **appeal**

You may influence WHAT the members discuss:
▶ if you would like to discuss something – **motion**
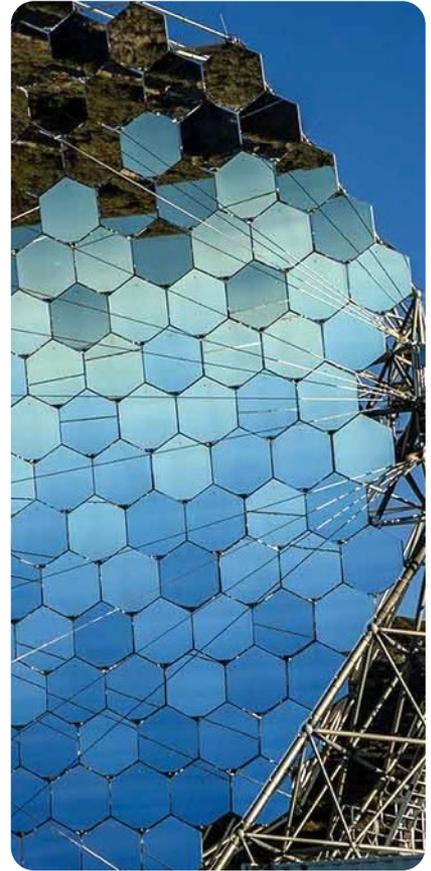▶ if you would like to change a motion under discussion – **amend**

You may influence HOW and WHEN the members discuss a motion:
▶ if you want to discuss the topic at another time – **postpone**
  or **lay it on the table**
▶ if you think people are ready to vote – **call the question**

To:	You say:	Interrupt Speaker	Second Needed	Debat ~able	Amend ~able	Vote Needed
Adjourn	"I move that we adjourn"	No	Yes	No	No	Majority
Recess	"I move that we recess until..."	No	Yes	No	Yes	Majority
Complain about noise, room temp., etc.	"Point of privilege"	Yes	No	No	No	Chair Decides
Suspend further consideration of something	"I move that we table it"	No	Yes	No	No	Majority
End debate	"I move the question"	No	Yes	No	No	2/3
Postpone consideration of something	"I move we postpone this matter until..."	No	Yes	Yes	Yes	Majority
Amend a motion	"I move that this motion be amended by..."	No	Yes	Yes	Yes	Majority
Introduce business (primary motion)	"I move that..."	No	Yes	Yes	Yes	Majority

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To:	You say:	Interrupt Speaker	Second Needed	Debat ~able	Amend ~able	Vote Needed
Object to procedure	"Point of order"	Yes	No	No	No	Chair decides
Request information	"Point of information"	Yes	No	No	No	None
Ask for vote by actual count	"I call for a division of the house"	Must be done before new motion	No	No	No	None unless someone objects
Object to considering some matter	"I object to consideration of this question"	Yes	No	No	No	2/3
Take up matter previously tabled	"I move we take from the table…"	Yes	Yes	No	No	Majority
Reconsider something	"I move we now (or later) reconsider our action relative to…"	Yes	Yes	Same as original motion	No	Majority
Vote on a ruling by the Chair	"I appeal the Chair's decision"	Yes	Yes	Yes	No	Majority

8. Expense reporting and basics of finances

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Understanding financial statements

Activity Between Periods

Balance Sheet (PY)
AT December 31, 2023

Balance Sheet (CY)
AT December 31, 2024

Income Statement (Activity **For Period Ended** 2024)

Statement of Cash Flows (Activity **For Period Ended** 2024)
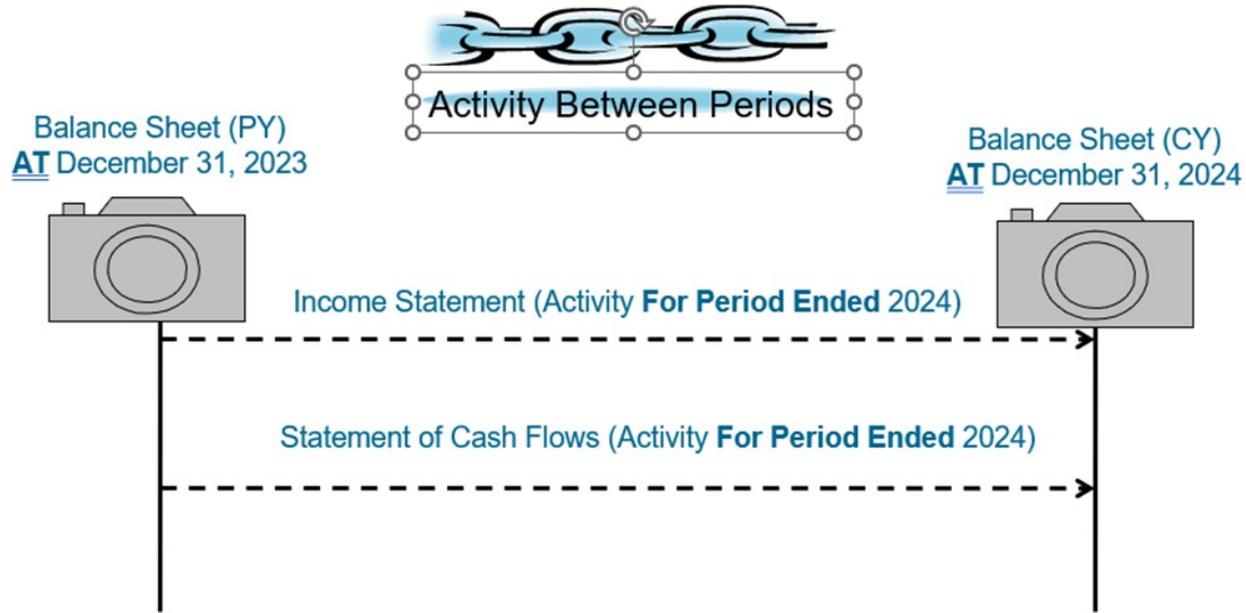
IEEE finances

- IEEE is in very strong financial position and prepared for potential disruptions in business.

	2024	2023
ASSETS		
Current assets		
Cash and cash equivalents	$ 22,282,100	$ 20,019,700
Accounts receivable, less allowance for credit losses of $838,300 in 2024 and $1,785,500 in 2023	92,671,400	64,220,400
Prepaid expenses and other assets	15,297,200	16,364,200
Investments, at fair value	1,279,684,700	1,142,975,300
Investments - other	3,605,100	3,779,900
Income tax receivable	17,400	-
Total current assets	1,413,557,900	1,247,359,500
Noncurrent assets		
Land, buildings and equipment, net	25,842,100	26,495,000
Right of use of assets - operating	7,784,800	6,681,000
Right of use of assets - finance	22,900	34,600
Deferred tax assets	118,600	67,600
Total assets	$1,447,326,300	$1,280,637,700

Source: 2024 consolidated financial statements

IEEE. Revenues and expenses

	Without Donor Restrictions	With Donor Restrictions	Total 2024	Total 2023
Revenues				
Memberships	$ 62,600,300	$ -	$ 62,600,300	$ 56,311,200
Periodicals	288,176,100	-	288,176,100	259,004,600
Conferences	243,690,400	-	243,690,400	215,723,000
Standards	48,178,300	-	48,178,300	49,016,000
Public imperatives	3,257,300	347,500	3,604,800	3,898,500
Other income	126,000	-	126,000	47,900
Net assets released from restrictions	237,600	(237,600)	-	-
Total revenues	646,266,000	109,900	646,375,900	584,001,200
Expenses				
Program services				
Memberships	116,642,400	-	116,642,400	104,654,600
Periodicals	195,372,700	-	195,372,700	173,295,900
Conferences	199,514,600	-	199,514,600	178,095,000
Standards	53,895,500	-	53,895,500	49,751,600
Public imperatives	17,461,500	-	17,461,500	14,534,500
Total program services	582,886,700	-	582,886,700	520,331,600
Supporting services				
In-Kind contribution	1,901,600	-	1,901,600	1,603,400
General and administrative	15,888,200	-	15,888,200	13,246,800
Total expenses	600,676,500	-	600,676,500	535,181,800

Source: 2024 consolidated financial statements

R8 income, expenses and assets

Budget	Actual 31/12/2025
Income: Balance/savings carried forward from previous year	$463,800
Income: Voluntary Contributions: Member Donations	$13,428
Income: Support from Organisations	$344
Income: FCS Conference Revenue	$39,958
Income: Student Activities (Sponsorships)	$55,000
Income: Receipts for Student Activities (Registrations)	-
Income: Support for Projects	$41,500
Income: Rebate: MGA Allocation for Management of the Region	$177,634
Income: Regional Assessment: Membership Dues Element	$477,795
Income: Support for Members outside of Sections	-
Income: Interest received: CB Bank Account	$47,538
Income: Interest received: Other Bank Accounts	-
Income: Other Receipts	$294
Income: R8 as Intermediary	$7,315
Income: Loan Repayment	-
Budget Income Total	**$1,324,606**

R8 Nominal Code	Actual
Committee general Total	($595,656)
Region 8 Director Total	($24,645)
Region 8 Director-Elect Total	($2,973)
Region 8 Past-Director Total	($3,128)
Vice Chair for Technical Activities Total	($39,099)
Vice Chair for Member Activities Total	($84,032)
Vice Chair for Student Activities Total	($55,466)
Region 8 Secretary Total	($1,258)
Region 8 Treasurer Total	($12,965)
Expenses from previous year budget Total	($26,175)
Budget Expenses Total	**($845,397)**

IEEE REGION 8 BALANCE SHEET

ACCOUNT ($)	31/12/2024	31/12/2025	Diff
IEEE Custody Banking REGION 8	1,300,713	1,244,209	-56,504
NatWest REGION 8 USD ACCOUNT	37,854	116,143	78,289
NatWest REGION 8 EURO ACCOUNT	10,051	7,417	-2,634
NatWest REGION 8 GBP ACCOUNT	1,101	286	-814
Liquid assets (cash)	*1,349,718*	*1,368,054*	*18,336*
IEEE Long Term Investments Fund (LTIF)	1,220,088	1,306,766	86,678
Total assets	*2,533,912*	*2,674,821*	*105,014*

Source: unaudited 2025 actuals

IEEE as a public charity

IEEE is a
New York Not-for-profit Corporation
And a
501(c)(3) Public Charity
Under the U.S. Internal Revenue Code

A public charity is given special tax advantages because it is treated as overseen by the public.

Two key elements:

❖ **Exempt Purpose**: Must operate exclusively for scientific and educational purposes; AND

❖ **No Private Benefit**: Cannot engage in any activity that provides more than an insubstantial, incidental benefit to any private individual or entity.
   - Career networking, job fairs, certificate programs, etc. are generally not charitable
   - A joint venture that substantially benefits a for-profit is not charitable.

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Public Imperative Activities

"Social good activities that are directed at the general public. They are generally related to the promotion of the public's understanding and appreciation of our fields of interest and/or positioning our technical expertise in ways to benefit humanity. Typically, these activities are not expected to create a financial surplus."

Updated definition as adopted by the Board of Directors in November 2024

Yes, these are Public Imperatives	No, these are not Public Imperatives
• Primary goal is directly for the social good • Must be available to public at large • Major beneficiary is the public • Part of the responsibility of IEEE being a steward of the profession • Promote the public's understanding and appreciation of engineering and our related fields • Generating a surplus is not a key metric	• Primary beneficiary is the individual professional • Member benefits and member discounts • Financial metrics are primary for the health of IEEE
Examples of Public Imperatives • Educational activities • Feet-on-the-ground humanitarian activities • Public Policy and Advocacy • Provide unbiased information or events on technology	**Examples of non-Public Imperatives** • Publications • Membership (including WIE, YPs, discounts) • Conferences (primary goal is the exchange of technical information without a larger public benefit)

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Section finances

Examples of potential incoming sources
- Regions may have Section Support programs in place
- Societies may have programs to support Section/Chapter activities
- Workshops, Tutorials, Conferences
- Other IEEE GEO Unit Programs: Life Members, HTB
- External Sources (Industry support)
- Contributions from donors
- Reserves and IEEE Spending Rules

Examples of fund usage
- Local events
- Chapter Support
- Student Branch Support
- Affinity Group Support: PACE, WIE, YP
- Life Members, Sections Congress
- Scholarships, Grants, Awards, Distinguished Lecturers (see policy)
- Publication and Advertising expense
- Travel related to meetings and events

Section finances best practices

- GEO Units should comply with the yearly financial reporting schedule.

- Section Chair & Treasurer should periodically review the original monthly statements of account & compare them to recent financial report in NextGen
  - It is recommended that Treasurers review account activity and tag transactions each quarter
  - Good practice for all GEO unit leaders to review account activity
  - Overspending practices

- A periodic review with Executive Committee should be standard procedure

- More than one person should oversee financial records

Reporting your expenses

Travelling on IEEE business (from FOM.6)

▶ It is IEEE policy to provide for, or reimburse, **reasonable authorized travel expenses** incurred in connection with the conduct of IEEE business. All persons traveling on IEEE business for whom IEEE pays or reimburses transportation expenses shall **travel economically by booking economy class flights well in advance** and shopping for low-cost business class train fares and low-cost rental car rates. Guidelines and procedures for reimbursement are available.

▶ IEEE does not reimburse for the travel expenses of spouses or travel companions as an entitlement. **Airfare, hotel, and incidental costs of spouses or travel companions are never covered** but it is recognized that there are occasions where the demand on volunteer time in particular, requires travel with a spouse or companion which may result in some meal costs being expensed. Since the purpose of the business trip is already deemed necessary and the only incremental cost is the spouse/companion meals, **expensing the meals is acceptable as long as the cost is reasonable and the practice is not perceived as an entitlement**. **Spouse/companion costs for purely social gatherings must be reimbursed on the staff or volunteer person's expense report as a reduction of reimbursed expenses.**

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Allowable expenses

▶ In general, everything that is reasonable to spend to do the IEEE business at a given place.

▶ Always book the cheapest economy ticket available.

▶ Meal expenses are refundable up to $100 per day (this is not a daily allowance).

▶ Meals are not reimbursed if they are provided by the event organization.

▶ Extra hotel cost for a double room to include a companion is covered (R8)

▶ Meals of companions participating in business meetings are covered (R8)

▶ Visa processing fees are refundable. Credit card processing charges too.

▶ As a general rule, try to share taxis or use other public transportation if possible.

▶ You can combine IEEE and personal travel if you follow these guidelines.

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Using Concur for reimbursement

▶ Give your claim a title describing the event for which you claim. Add Comment.

▶ Make certain you use correct expense type and claim from the correct Expense Report Purposes (ERPs). Ask event organizer for ERPs, if not certain.

▶ Although it is possible in Concur to combine claims, this may be confusing for the volunteer Approvers as they are different Approvers for different ERPs –> avoid.

▶ Claim only for expenses which are allowed by Region 8.

▶ Use Comments to explain not so obvious expenses.

▶ Enter amounts in the currency that was used (not your currency). Differences can also be claimed.

Using Concur for reimbursement

▶ Although it is formally not compulsory to attach scanned receipts for expenses under $25 or 25€, we would like to see all of them. Credit cards statements alone are not sufficient.

▶ If you lost a receipt, you need to attach and sign a Missing Receipt Declaration.

▶ Details for items labeled "Miscellaneous" or "Other" MUST be provided in the Comment field.

▶ Submit your report before 60 days. Late reports will NOT be processed, unless there are special circumstances.

▶ For Region 8, it is possible to deduct from the claim a previously received advance, reimbursed airline ticket, etc. Use a "Miscellaneous" type, enter negative amount, describe in Comment, and give the code corresponding to the original purpose of the advance. Note, that the overall total of the claim must be positive.

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Using Concur - starting

▶ Unfortunately, not available in all R8 countries due to OFAC restrictions

▶ How to log in

- Go to ieee.org/expense, on the right-hand side of the screen, click the Orange button to Log in. Use your IEEE account and password. **Do not** go to concur.com

- New users: if you do not have a Concur account, use the 2nd blue button to create one. Allow 24-36 hours for activation, you will receive an email. For many countries, you would also need to enroll with Western Union/Convera with your bank account details

▶ Concur app

- Allows you to create, submit, approve reports directly on your mobile phone

- Take a photo of your receipts with the app and Concur OCR will help auto-populate expense lines

Access

Step 1: How to Get Started

Request an IEEE Account
(Skip if you have one)

Create Your Expense
Reimbursement Account

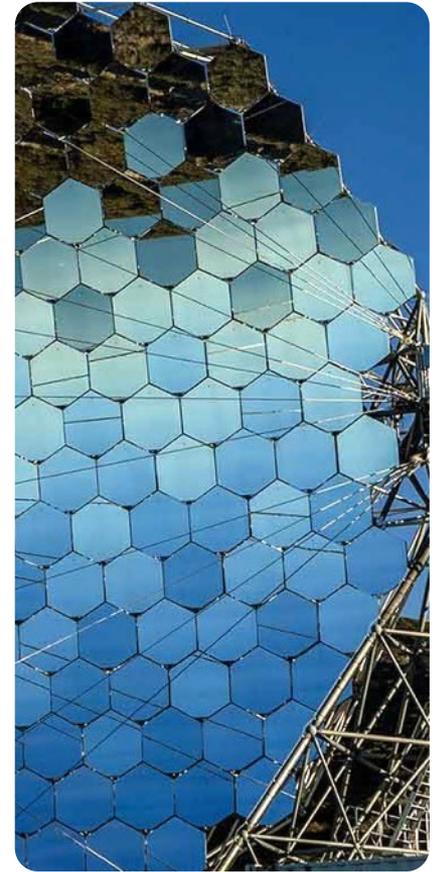Step 2: Access

Log In
(May require IEEE Network login)

Step 3:

Download the App

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Claiming expenses from this meeting

▶ R8 has Budget Codes in the format **XYZ0 Name**

▶ In Concur ERP Level 4 the above budget code is described as

- **XYZ Name (9.0X.XYZ)** for the current year, and

- **XYZ Name (9.10.XYZ)** for the previous year expenses

▶ For travel expenses for this meeting, the R8 Budget Code is 1020 and the ERP Level 4 is **102 R8 Cmte.Meeting Spring Travel (9.01.102)**

Expense Report Purpose Level 1 * ①	Expense Report Purpose Level 2 * ②
Regions ✕ ⌄	Eur. Mid. East Africa - Region 8 ✕ ⌄
Expense Report Purpose Level 3 * ③	Expense Report Purpose Level 4 * ④
Eur. Mid. East Africa - Region 8 (R8) ✕ ⌄	102 R8 Cmte.Meeting Spring Travel (9 ✕ ⌄

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9. Concluding remarks

A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity.

Thank you!

As a member-oriented, volunteer-led, staff supported organization, IEEE can only work thanks to volunteers like you.

Thanks for everything you do in support of IEEE's mission of advancing technology for humanity.

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Questions?

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Appendixes

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Useful links

- IEEE Membership. link .
- Geographic Units FAQ's https://supportcenter.ieee.org .
- OU Analytics: Web-based ad hoc query tool that provides volunteers access to member data. Allows querying, reporting, and downloading of membership data to authorized or designated volunteers. link .
- eNotice: Electronic service developed for organizational units to facilitate email distribution of newsletters, meeting notices and conference materials. https://enotice.vtools.ieee.org