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The IEEE Board of Directors approves changes to the *IEEE Bylaws* and *IEEE Policies* from time to time. This document is updated on a regular basis and the most current version will be provided to all candidates running for office or seeking nomination by petition.

## Key Dates and Deadlines

15 March 2018 (Thursday)	<p>Slate of nominated candidates for inclusion on the 2018 IEEE Annual Election ballot must be received by the IEEE Board of Directors by 15 March 2018. Slates shall be accompanied by each candidate's written acceptance of his or her nomination.</p> <p><a href="#">Bylaw I-307.7 Submission of Slates</a> Submit slates to <a href="mailto:annual_election@ieee.org">annual_election@ieee.org</a>.</p>
15 April 2018 (Sunday)	<p>Individual voting members who wish to circulate a petition shall submit a petition draft to the Board of Directors no earlier than 1 May of the year preceding the election and no later than 15 April of the year of the election.</p> <p><a href="#">Policy 13.7.3. Petitions and Signature Requirements</a> Submit petition draft to <a href="mailto:annual_election@ieee.org">annual_election@ieee.org</a>.</p>
16 April 2018 (Monday)	<p>All nominated candidate materials within the specified number of words must be received by the election staff by the first working day following 15 April 2018*. Materials due:</p> <ul style="list-style-type: none"><li>• Biography</li><li>• IEEE Accomplishments and Activities</li><li>• Candidate Statement</li><li>• Candidate photograph taken after 15 August 2016</li></ul> <p>All materials must be in standard English, and it contains no more than the specified number of words.</p> <p>Optional for candidates:</p> <ul style="list-style-type: none"><li>• Personal candidate website URL for inclusion in the ballot materials</li></ul> <p><i>*Individuals who have been successful in their nomination by petition shall submit their materials within ten working days following the petition tally announcement by the IEEE Tellers Committee.</i></p> <p><a href="#">Policy 13.7 Nominations and Elections – Ballot Material</a> Submit materials to <a href="mailto:annual_election@ieee.org">annual_election@ieee.org</a>.</p>
1 May 2018 (Tuesday)	<p>Slate of nominated candidates is announced by the Board (all successful petition candidates will be included if they meet all the petition requirements before the article is finalized for publication).</p> <p><a href="#">Bylaw I-307.9 Voting Members Candidate Notification</a></p>
11 May 2018 (Friday)	<p>By 12:00 noon Eastern Time USA (16:00 UTC), all petition signatures must be received by election staff to be counted (paper form via postal mail or electronic via petition website).</p> <p><a href="#">Bylaw I-307.10 Petition Candidates</a> Submit all petition signatures for processing to <a href="mailto:annual_election@ieee.org">annual_election@ieee.org</a>.</p>
8 June 2018 (Friday)	<p>By 12:00 noon Eastern Time USA (16:00 UTC), all candidate material approvals must be submitted to the election staff. Material approval not received from the candidate by the deadline will be omitted from the election materials provided to the membership (print and electronic formats).</p>

2018 IEEE Annual Election  
 Guidelines for Candidates in the IEEE Annual Election

	<p><a href="#">Policy 13.7.2. Photographs; Biographies; IEEE Election Website</a>          Submit material approvals to <a href="mailto:annual_election@ieee.org">annual_election@ieee.org</a>.</p>
30 June 2018 (Saturday)	<p>Ballots will be created for all eligible voting members on record on 30 June 2018 (GSM grade or higher).</p> <p><a href="#">Bylaw I-307.12 Ballot Submission Schedule</a>          Forward all eligibility questions to <a href="mailto:annual_election@ieee.org">annual_election@ieee.org</a>.</p>
15 August 2018 (Wednesday)	<p>Ballot packages will be mailed to eligible voting members who were on record on 30 June 2018.</p> <p>All eligible voting members on record on 30 June 2018 will receive an email notifying them that the ballots have been mailed and it will include electronic ballot access instructions.</p> <p><a href="#">Bylaw I-307.12 Ballot Submission Schedule</a>          Forward ballot package questions or member inquiries to <a href="mailto:annual_election@ieee.org">annual_election@ieee.org</a>.</p>
1 October 2018 (Monday)	<p>Balloting period ends at 12:00 noon Central Time USA (17:00 UTC).</p> <p><a href="#">Bylaw I-307.15 Ballot Marking; Voting; Tellers Committee Announcement; Election Results</a></p> <p>All ballots received after the deadline will not be counted. They will only be opened for “white mail” (i.e., renewal payment, address change request, etc.)</p>
October 2018 (Date to be determined)	<p>IEEE Tellers Committee meets to certify the annual election results. Following certification of results, candidates will be notified.</p> <p>Principal proponents and opponents of each proposed Constitutional Amendment will be advised of the Tellers Committee tally of votes applicable to their respective Constitutional Amendment proposals.</p> <p>Unofficial results for all offices will be posted on the <a href="#">annual election website</a> after all candidates have been notified.</p> <p><a href="#">Bylaw I-307.15 Ballot Marking; Voting; Tellers Committee Announcement; Election Results</a></p>
18-19 November 2018 (Sunday-Monday)	<p>IEEE Board of Directors acts to accept the annual election results submitted by the IEEE Tellers Committee. Election results become official.</p> <p><a href="#">Bylaw I-307.15 Ballot Marking; Voting; Tellers Committee Announcement; Election Results</a></p>
December 2018	<p>Announcement of annual election results is published in the first available issue of <i>IEEE Spectrum</i> or <i>The Institute</i>.</p> <p><a href="#">Policy 13.5 Announcement and Publication of Results of IEEE Elections and Referenda</a></p>

## Candidate Biographical Materials

Candidates are requested to provide information and materials that will be used to prepare the ballot materials. Sample candidate biographies, IEEE activities and accomplishments and statements will be provided to candidates electronically. Print samples are available upon request.

All candidates are requested to provide the following materials by 16 April 2018\*:

**1. Candidate photograph:**

- Photograph must be taken on or after 15 August 2016
- As required by IEEE Policy, candidates are required to attest the photograph age (short email stating when or if the photograph was taken after 15 August 2016)
- Photograph format is high-quality digital color in either TIFF or JPEG format, 300 DPI resolution, and minimum size of five inches across when printed
- [IEEE Policies, Section 13.7.2.A.](#)

**2. Candidate biography:**

- Word count limit is 150 words
- Personal biography should round out the profile of the candidate's experience outside IEEE activities
- The recommended writing of the biography is in third person (i.e., biography format used by authors in IEEE journals and publications)
- [IEEE Policies, Section 13.7.2.B.](#)

**3. IEEE accomplishments and services:**

- Word count limit is 300 words
- Factual summary of IEEE accomplishments and services to the IEEE
- Text formats:
  1. Paragraphs
  2. Bulleted lists
  3. Numbered lists
  4. Bold and italic text
- [IEEE Policies, Section 13.7.2.C.](#)

**4. Candidate Statement:**

- Candidate statement lengths:

Election Office	Candidate Statement Length
IEEE President-Elect	250 words
IEEE-SA President-Elect	200 words
IEEE-USA President-Elect	200 words
Technical Activities Vice President-Elect	200 words
Region Delegate-Elect/Director-Elect	175 words
Division Delegate-Elect/Director-Elect	175 words
IEEE-SA Board of Governors Member-at-Large	150 words

- [IEEE Policies, Section 13.7.1.E.](#)

**5. Personal website URL (optional):**

- IEEE will not be hosting or supporting personal candidate websites.
- Candidate materials (print and electronic) will include a link to one personal candidate website URL if it was provided by the candidate:
- Personal websites will need to include the following disclaimer prominently displayed on the web pages:

**“The opinions expressed on this website are the opinions of the author and not necessarily the opinions of the IEEE.”**

- There is no limit on the amount of material or information posted on the personal candidate website.

Candidate materials received will be date stamped and reviewed by the Corporate Governance staff and the IEEE Election Oversight Committee. Candidate Statements may not include illustrations or tabular matter. If the reviewers believe there are erroneous or legally actionable statements in a candidate's statement, or determines that the word limit has been exceeded, staff will notify the candidate immediately, so that the candidate can submit modifications within a period of 48 hours. If no modifications are received, the statement will be referred to the President for adjudication. The President will decide whether or not to place the statement on the ballot and in what form it shall be published and resolve disagreements between the reviewers and the originator of a statement.

On acceptance of candidate statements, they will be distributed without further changes. With the exception of typographical errors, which the staff will correct, candidate statements will be published verbatim, even when statements may contain errors in syntax. ([IEEE Policies, Section 13.7.1.B](#))

*\*Individuals who have been successful in their nomination by petition shall submit their materials within ten working days following the petition tally announcement by the IEEE Tellers Committee.*

## Word Count

All candidate materials shall be written in English and must not exceed the maximum word length requirement. To determine number of words ([IEEE Policies, Section 13.7.1.E](#)):

- precede IEEE by an article and count both as one word
- count an acronym as one word
- count a discrete alphanumeric as one word—for example, 21st in 21st Century counts as one word
- titles and other properly hyphenated words shall be counted as one word

Statements exceeding the maximum length shall be returned to authors for editing. Typed, edited copies shall be provided electronically to those who submitted them for their comments. If the decision is to publish a statement in a form not satisfactory to the candidate or initiator, the candidate or initiator shall have the option of asking that no statement be published.

## Equal Opportunity

Equal opportunity shall be provided to all nominated candidates and successful candidates nominated by petition for the same elective position. The editor, conference chair or other individual responsible for the activity shall determine the information to be presented or published, within the guidelines established by the governing body of that organizational unit, provided all candidates are treated equally. ([IEEE Policies, Section 13.3.D. Means of Informing Members of IEEE Organizational Units](#)).

If you are offered the opportunity to be published in any IEEE publication (print or electronic) in connection with your candidacy, please request that your opponent(s) be offered equal opportunity in the publication.

## Election Campaigns

Candidates are individuals who have been approved to have their names appear on an official slate by an IEEE Organizational Unit. Petitioners (namely Individuals who are in the process of collecting signatures on a petition to become candidates) are not considered candidates until the pertinent Organizational Unit has determined that their petition has met the conditions that would make the petitioner an official candidate. Candidates and petitioners shall follow the electioneering guidelines.

Members may be informed of the candidates' views and of issues pertaining to initiatives through messages sent by the candidate to potential voters (e.g., by postal mail and electronic mail), publications and related means (such as websites and portals) created and maintained by the candidate and/or the candidate's supporters, Board/Society/Council/Region/Section or Chapter meetings, conferences and publications. Equal opportunities shall be provided to all candidates for the same elective position. IEEE Policy Section 13 provides guidance to editors and conference organizers on how electioneering material is distributed (in-person, via e-mail, on-line, in publications and in IEEE meetings.) It also explains how presentations are to be made in IEEE meetings and how statements for publication are to be sought and presented. The editor, conference chair or other individual responsible for the activity shall determine the information to be presented or published, within the guidelines established by the governing body of that organizational unit, provided all candidates are treated equally.

The sending and management of candidate messages and candidate publications are governed by the IEEE Policy on Mailing Lists and Rosters (Section 14) and may be regulated further by guiding documents recommended by the IEEE Election Oversight Committee and approved by the IEEE Board of Directors.

In all communication with potential voters, candidates and their supporters should:

- Include provisions for opting out from future communications
- Include reminders about the need of recipients to adhere to IEEE policies, especially IEEE Policy on Mailing Lists and Rosters (Section 14)
- Avoid practices that would be interpreted by a reasonably prudent person as obtrusive or falling under the category of "spam".

Please refer to the following IEEE Policy Sections:

- [IEEE Policies, Section 13.3 Elections and Campaigns](#)
- [IEEE Policies, Section 13.7 Nominations and Elections – Ballot Material](#)
- [IEEE Policies, Section 14.1 Use and Control of Mailing Lists](#)

## IEEE Election Oversight Committee

The Election Oversight Committee will assist the IEEE in adjudicating election-related matters in the IEEE Annual Election and other IEEE elections. The Committee will also provide advice and guidance on electioneering related matters and recommend appropriate changes to electioneering procedures, oversee electioneering related information that flows from members, volunteers and staff on the way the elections process is progressing, and advise candidates if violations are detected. This Committee will also inform the IEEE President, Secretary and Executive Director of such violations and make recommendations for actions. This Committee reports directly to the IEEE President. ([Bylaw I-307.16. Oversight for Election Irregularities](#))

The IEEE Election Oversight Committee and IEEE's Staff can be contacted at [corp-electioneering@ieee.org](mailto:corp-electioneering@ieee.org).

## Violations of IEEE Electioneering Policies by Candidates and Other Members

Electronic electioneering process and adherence to the guidelines will be monitored during the election year. Alleged violations of IEEE electioneering policies shall be referred to the IEEE Election Oversight Committee. The Committee may correspond with nominees, candidates, petitioners, IEEE staff members, volunteers, and others to gather information and provide guidance and advice. The Committee is responsible for timely investigation of allegations of violations and for providing the head of the related major organizational unit with recommendations for action if a violation is verified, and if, in the judgment of the Committee, the extent of the violation requires additional action. In this case, the Committee may recommend that candidates be advised of a violation, censured officially by the major organizational unit, or have their candidacy terminated by the major organizational unit as follows:

- 1) The Election Oversight Committee may recommend to the IEEE President that Annual Election candidates be advised of a violation, be censured officially, or have their candidacy terminated, in line with the process outlined in [IEEE Bylaw I-307.17](#). In addition, the Election Oversight Committee may make a referral of the violation to the Ethics and Member Conduct Committee.
- 2) The Election Oversight Committee, may recommend to the respective major organizational unit that other election candidates be advised of a violation, be censured officially, or have their candidacy terminated. If the Election Oversight Committee recommends termination of candidacy, its recommendation shall include additional guidance concerning the necessary approvals of termination decisions, and opportunity of appeal by the candidate. In addition, the Election Oversight Committee may make a referral of the violation to the Ethics and Member Conduct Committee.
- 3) If it is alleged that violations of IEEE campaigning policies were committed by an IEEE member who is not a candidate, the Election Oversight Committee may take one or more of the following actions:
  - a) Recommend to the relevant Chair of an IEEE Organizational Unit that the Member be advised by the governing body of the Organizational Unit of a violation, be censured officially, suspended or removed from some or all current volunteer positions in that unit for a specified period of time, or prohibited from accepting new volunteer positions for a specified period of time.
  - b) Recommend to the President that the Member be advised by the IEEE Board of Directors of a violation, be censured officially, suspended or removed from some or all volunteer positions across IEEE for a specified period of time, or prohibited from accepting new volunteer positions for a specified period of time.
  - c) Refer the violation to the IEEE Ethics and Member Conduct Committee, which may recommend additional sanctions, up to and including expulsion from IEEE.
- 4) All recommendations of the IEEE Election Oversight Committee as well as their disposition shall be reported to IEEE Legal Counsel and be considered in future reviews of candidates for IEEE elected or appointed positions.

*([IEEE Policies, Section 13.3.G. Violations of IEEE Campaigning Policies by Candidates and Other Members](#))*

## IEEE Membership Mailing Lists and Rosters

IEEE Membership Mailing Lists, whether obtained through IEEE Headquarters or through any IEEE Organizational Unit, may not be used for electioneering in connection with any office within the IEEE, or for political purposes, or for commercial promotion, except as explicitly authorized in [IEEE Policies, Sections 14.1.I. and 14.1.J.](#)

Upon request and at the discretion of the IEEE President (or his/her designees) candidates whose names appear on a slate which is part of the IEEE Annual Election may be granted the permission to distribute a message to the pertinent electorate using an IEEE mailing list via electronic mail or other mass distribution means.

Electronic Mail - Messages distributed by IEEE as electronic mail shall be pertinent to promoting the individual's candidacy. Each message distributed by IEEE as electronic mail shall be written in standard English, and be no longer than 200 words. Candidates may make multiple requests. The President may limit the number of messages per candidate. Permission may be granted considering the following:

- 1) In the President's opinion, the authorization of the message would further the objectives of the election and on balance be beneficial to the interests of IEEE.
- 2) All candidates for the same position are to be granted the same opportunity to use the same communication vehicle.
- 3) Candidates will not have direct access to the mailing lists of the electorate. Distribution of candidate message(s) is to be coordinated by IEEE Staff through an external contractor selected by IEEE Staff.
- 4) Any candidate who wishes to avail himself/herself of this opportunity must pay all the related costs when applicable, as calculated by IEEE Staff and approved by the IEEE Executive Director.
- 5) If some candidates wish to avail themselves of such mass mailing opportunity and some do not, then it is permissible to serve only those candidates who wish to participate.
- 6) The provisions in this section for candidates in the IEEE Annual Election are extended to opponents/proponents of constitutional amendments.

Requests to use IEEE mailing lists in non-electronic form (e.g., postal mail) will be processed by IEEE Staff. To the extent practicable, Staff will develop a plan to accommodate the requesting candidate, using a procedure and vendor(s) of IEEE's choosing. Candidates will not have direct access to the mailing lists of the electorate. IEEE Staff labor costs and all related fees and costs charged by the vendor(s) will be the responsibility of the requesting candidate. Non-electronic messages shall be pertinent to promoting the individual's candidacy and shall be written in standard English. Candidates may make multiple requests. The President may limit the number of mailings per candidate.

## Candidates in Conferences/Meetings and Publications

Candidates for office may be invited to appear at meetings to discuss their position, and may be reimbursed for actual travel expenses by the organizational unit organizing the meeting. Equal opportunity shall be provided to all candidates for the same elective position. ([IEEE Policies, Section 13.3.D. Means of Informing Members of IEEE Organizational Units](#))

The sending and management of certain candidate messages and certain candidate publications are governed by the IEEE Policy on Mailing Lists and Rosters (Section 14) and may be regulated further by guiding documents recommended by the IEEE Election Oversight Committee and approved by the IEEE Board of Directors. In all campaign-related communication with potential voters, candidates and their supporters shall:

- a) Include provisions for opting out from future communications;
- b) Include reminders about the need of recipients to adhere to IEEE policies, especially IEEE Policy on Mailing Lists and Rosters (Section 14);
- c) Avoid practices that would be interpreted by a reasonably prudent person as obtrusive or falling under the category of "spam";
- d) Include the following disclaimer:

***"The opinions expressed herein are the opinions of the author and not necessarily the opinions of IEEE."***

## Conference/Meeting Invitations and Requests

Conference/meeting organizers may arrange for candidates to make presentations to the attendees within designated sessions and forums. The same opportunity to participate and present must be given to all candidates, as follows ([IEEE Policies, Section 13.D.3.](#)):



- a) all candidates must be invited at least sixty (60) days in advance of the event and be given fourteen (14) days to respond to the invitation;
- b) if the event provides funding to some candidates to appear in an election-related forum then all candidates must be provided with equivalent funding. “Equivalent funding” means that if the event funds candidates’ travel, all candidates must receive funds that allow them to arrive at the event in time for the presentation, using the usual and customary mode of transportation from their official home address, as recorded by IEEE, to the venue of the event. Candidates whose official home address is more than 50 miles away from the venue of the event must receive funding for the necessary usual and customary lodging associated with the timing of their presentation;
- c) all candidates shall be given the choice to appear in person or through remote communication means;
- d) if some candidates do not respond in time to the event’s invitation or decline/fail to participate, then the planned session/forum can proceed without those candidates, provided that the names and affiliations of all candidates for the same position are provided to forum/session attendees;
- e) if a candidate is unable to participate in a debate or presentation they can submit a video presentation that conforms in length and format to the constraints of the forum/session as determined by the event organizers.;
- f) Distribution of printed material in conjunction with a presentation at a conference/meeting requires consent of the organizers of the conference/meeting.

### Publication Invitations and Requests

Editors of IEEE publications who plan to publish election related materials are encouraged to seek written material from candidates, pose questions of interest to their readership, and request position statements from candidates. The same opportunity must be given to all candidates to participate as follows ([IEEE Policies, Section 13.D.4.](#)):

- a) all candidates must be given at least fourteen (14) days to respond to the request for written material;
- b) candidates must be given at least forty-five (45) days to prepare the requested written material, inclusive of the fourteen (14) days allotted for response in C.4.a;
- c) the same instructions in terms of objectives, issues and length are given to all candidates and enforced uniformly;
- d) if some candidates fail to respond or to meet the deadline, the planned election- related item can be published using material submitted by the other candidates who responded in time, provided that names and affiliations of all candidates for the same position are provided as part of the published item.

### Editorials, Support/Opposition Articles and Endorsements

Due to the great difficulty of ensuring equal opportunity for all candidates in responding to or confronting editorials, support articles, articles that criticize certain candidates, and endorsements, the publication of such material in official IEEE publications is prohibited. Candidates may include such material on their personal websites and in brochures or other written documents. ([IEEE Policies, Section 13.3.D.5.](#))

### Non-Electioneering Activities in Conferences and Publications

#### Routine Non-Campaigning Activities of Candidates

Some candidates may hold volunteer positions that provide them with access and travel to IEEE meetings and conferences, and/or give them an opportunity to address wide audiences. Some candidates are authors and presenters of papers and technical talks. Some candidates organize, preside-at and moderate meetings due to their volunteer responsibilities. As long as in the course of such routine activities candidates refrain from using the associated IEEE forum for campaigning, there are no prohibitions or restrictions on such activities. It is permissible to advertise the fact that a presenter in an IEEE forum/session is a candidate for an elected IEEE position, provided that the names and affiliations of all other candidates for the position are mentioned at the same time/instance. ([IEEE Policies, Section 13.3.D.6.](#))

### Non-Routine Non-Campaigning Activities of Candidates

During the course of an IEEE election, a candidate may be given visibility in roles that are not directly related to the election, but may be perceived as offering this candidate with significant exposure that may influence potential voters. The variety and diversity of such potential roles precludes the prescription of specific guidelines for each one. However, in the spirit of providing equal opportunity for all candidates, it is recommended that the event organizers and editors refrain from engaging candidates in such roles to the extent practicable while they are running for IEEE office. IEEE volunteers in positions of authority over an event or publication should use their judgment and authority to allow/disallow the assignment of such roles to candidates in order to support the principle of providing equal opportunity to all candidates. The IEEE Election Oversight Committee may be used as a source of advice and conflict resolution to address such situations. ([IEEE Policies, Section 13.3.D.7.](#))

### Distribution of Election-Related Printed Material in Gatherings and Events

Distribution of election-related printed material in gatherings and events requires consent of the organizer(s) of these events. Organizers are encouraged to allow such distribution, provided that in their judgment it does not interfere with the purpose or orderly conduct of the conference. To the extent practicable, organizers are obligated to provide all candidates for the same position, who have approached them in a time frame that allows accommodation, with the same opportunity to distribute their materials. Organizers are not obligated to contact candidates for the same position who have not made such requests. The Election Oversight Committee shall serve as a resource for conference organizers and volunteers to address questions regarding implementation issues. ([IEEE Policies, Section 13.3.D.8.](#))

In some cases the Election Oversight Committee may find that a violation of the campaigning rules has occurred, and that this violation has resulted in an imbalanced presentation of a candidacy to the electorate. In such cases, the Committee may recommend to the head of the relevant Organizational Unit that remedial action be taken to balance the presentation. For example – the Committee may recommend that an imbalanced message sent to the electorate be balanced by an authorized subsequent message that corrects the imbalance and that it be sent to approximately the same recipients of the original message.

### Violations of IEEE campaigning policies by candidates and other members.

Alleged violations of IEEE campaigning policies shall be referred to the IEEE Election Oversight Committee. The Committee's Operations Manual shall specify procedures for investigation of such violations and development of recommendations for potential sanctions. The Committee may correspond with nominees, candidates, petitioners, IEEE staff members, volunteers, and others to gather information and provide guidance and advice. ([IEEE Policies, Section 13.3.G.](#))

The Committee is responsible for timely investigation of allegations of violations and for providing the head of the related major organizational unit with recommendations for action if a violation is verified, and if, in the judgment of the Committee, the extent of the violation requires additional action. In this case, the Committee may recommend that candidates be advised of a violation, censured officially by the major organizational unit, or have their candidacy terminated by the major organizational unit as follows:

- 1) The Election Oversight Committee may recommend to the IEEE President that Annual Election candidates be advised of a violation, be censured officially, or have their candidacy terminated, in line with the process outlined in IEEE Bylaw I-307.17. In addition, the Election Oversight Committee may make a referral of the violation to the Ethics and Member Conduct Committee.
- 2) The Election Oversight Committee, may recommend to the respective major organizational unit that other election candidates be advised of a violation, be censured officially, or have their candidacy terminated. If the Election Oversight Committee recommends termination of candidacy, its recommendation shall include additional guidance concerning the necessary approvals of termination decisions, and opportunity of appeal by the candidate. In addition, the Election Oversight Committee may make a referral of the violation to the Ethics and Member Conduct Committee.

- 3) If it is alleged that violations of IEEE campaigning policies were committed by an IEEE member who is not a candidate, the Election Oversight Committee may take one or more of the following actions:
  - a) Recommend to the relevant Chair of an IEEE Organizational Unit that the Member be advised by the governing body of the Organizational Unit of a violation, be censured officially, suspended or removed from some or all current volunteer positions in that unit for a specified period of time, or prohibited from accepting new volunteer positions for a specified period of time.
  - b) Recommend to the President that the Member be advised by the IEEE Board of Directors of a violation, be censured officially, suspended or removed from some or all volunteer positions across IEEE for a specified period of time, or prohibited from accepting new volunteer positions for a specified period of time.
  - c) Refer the violation to the IEEE Ethics and Member Conduct Committee, which may recommend additional sanctions, up to and including expulsion from IEEE.
- 4) All recommendations of the IEEE Election Oversight Committee as well as their disposition shall be reported to IEEE Legal Counsel and be considered in future reviews of candidates for IEEE elected or appointed positions.

## IEEE Email Terms and Conditions

[https://www.ieee.org/membership\\_services/membership/products/ieee\\_email\\_policy.html](https://www.ieee.org/membership_services/membership/products/ieee_email_policy.html)

Candidates or candidate supporters may not use the IEEE membership database, or any derivative thereof (SAMIEEE, rosters) to produce a mass email/electronic campaign in support of a candidacy. The IEEE Election Oversight Committee will be notified of any deviations from the IEEE Email Terms and Conditions and may take whatever action it deems necessary.

IEEE email lists may only be used for conducting IEEE business. Use of such lists is subject to compliance with IEEE's governing documents including, but not limited to, the IEEE Bylaws, IEEE Policies and election campaigning policies, organizational unit policies, business practices, and these terms and conditions. IEEE volunteers and staff may request the creation of IEEE email lists. These requests are subject to review and approval by the responsible IEEE organizational unit.

- IEEE email lists or functional alias are to be used solely for the purpose of conducting IEEE business. They may not be used to promote an election candidate or candidate campaign
  - E-Mail list - A collection of e-mail addresses representing people or a specific group, assembled and identified by a unique e-mail alias (e.g., xyz@ieee.org). Any information sent to this alias is distributed to all e-mail addresses and/or e-mail aliases on the list.
  - Functional alias - An e-mail alias that represents an IEEE department, conference, entity, or other activity (e.g., helpdesk@ieee.org, or list-owner-ITSC@ieee.org), as opposed to an individual's name.
    - IEEE E-mail Acceptable Use Practices addresses the use of IEEE email lists ([https://www.ieee.org/membership\\_services/membership/products/ieee\\_email\\_policy.html](https://www.ieee.org/membership_services/membership/products/ieee_email_policy.html))
    - Do not send any electioneering type communications to group aliases or IEEE Online Communities. If you choose to send notification to colleagues, you must take affirmative steps to ensure and be able to demonstrate that the email is welcomed. You must ask that the recipient not forward such notification or any election related e-mails to other members by using an "@ieee.org" email distribution alias list. ([https://www.ieee.org/membership\\_services/membership/products/ieee\\_email\\_policy.html](https://www.ieee.org/membership_services/membership/products/ieee_email_policy.html))
- In all communication with potential voters, candidates and their supporters shall:

- Avoid practices that would be interpreted by a reasonably prudent person as obtrusive or falling under the category of “spam”
- Include provisions for opting out from future communications
- Include the following reminders:
  - Disclaimer statement “***The opinions expressed in this communication are the opinions of the author and not necessarily the opinions of the IEEE***”
  - The following language is to be included on such communications “***Do not forward this communication to IEEE maintained e-mail lists or functional group aliases***”.
- The IEEE Code of Ethics, the IEEE Code of Conduct, and relevant IEEE Policies apply to the use of IEEE e-mail services.
  - IEEE Code of Ethics <https://www.ieee.org/about/corporate/governance/p7-8.html>
  - IEEE Code of Conduct [https://www.ieee.org/about/ieee\\_code\\_of\\_conduct.pdf](https://www.ieee.org/about/ieee_code_of_conduct.pdf)

## IEEE Social Media Policy and Guide

IEEE social media consists of Web sites, portals, and applications that allow individuals to post and share content publicly, allowing other individuals to view and respond to that content.

- IEEE Social Media Policy: [IEEE Policies, Section 9.27](#)
- IEEE Social Media home page: [https://www.ieee.org/about/social\\_media/index.html](https://www.ieee.org/about/social_media/index.html)

Election related best practices:

- **Don't spam or post unsolicited messages.** Do not post inappropriate content, advertisements, promotions and/or solicitations for products and services to social media sites, unless it is expressly permitted by users of the social media space where you are posting.
- **Register your site.** Whether you are running a blog, Facebook page, Linked-in group, or another social media site that is operated on behalf of the IEEE and/or that prominently features IEEE logos or brands, you must register your site with IEEE. To register your site, you must agree to follow these policies and best practices. Once registered, your site will be listed on the IEEE website and you will receive important updates from the [IEEE Social Media Help Forum](#). Social media sites that are operated on behalf of IEEE and/or prominently feature IEEE logos or brands, must support the mission of IEEE.

## Election Petitions

In accordance with [IEEE Bylaw I-307.9](#), individual voting members may propose, by petition, names to be added to the ballot for the offices that appear on the IEEE Annual Election ballot.

Individual voting members who wish to circulate a petition shall submit a petition draft to the Board of Directors no earlier than 1 May of the year preceding the election and no later than 15 April of the year of the election. The petition draft (whose text shall follow the text proposed in [IEEE Policies, Section 13.7.3.B](#)) must be accompanied by a statement by the proposed candidate that he or she is willing to serve if elected. Following the receipt of notification of the intent to petition by the election staff, the IEEE Legal and Compliance Department shall conduct the same candidate review of the appropriate records of IEEE that it provides to the IEEE Nominations and Appointments Committee in its candidate vetting process with respect to ethical and legal conduct and compliance with IEEE governance documentation and practices. Following the receipt of the written report from the Legal and Compliance Department, the President, in consultation with the IEEE Secretary and the IEEE Executive Director,

## 2018 IEEE Annual Election Guidelines for Candidates in the IEEE Annual Election

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shall make a determination regarding whether the potential petition candidate shall be allowed to petition. Such determination shall be communicated to such party by the Election Staff.

The completed petition shall be received at IEEE Headquarters no later than 12:00 noon on the Friday preceding 15 May of the year of the election (11 May 2018). ([IEEE Bylaw I-307.10 Petition Candidates](#))

All individuals seeking nomination by petition shall follow the same electioneering guidelines as nominated candidates from the time they begin their petition throughout the election process. Access to those who signed petitions will be limited to the Election Staff responsible for validating the signatures or those who are responsible for the election process. ([IEEE Policies, Section 13.3. Elections and Electioneering](#))

Petitioners are bound by the principles and relevant provisions of IEEE's campaigning policies but do not enjoy the privileges of candidates (such as equal opportunity to present in IEEE conferences/meetings and publications) until they become official candidates.

- IEEE organizational units are not obligated to offer candidates retroactive provisions for electioneering opportunities that were not available to them before they were officially declared candidates.
- Alleged violations of IEEE electioneering policies will be referred to the IEEE Election Oversight Committee. The Committee may correspond with petitioner and others, gather information and provide guidance and advice. The Committee is responsible for timely investigation of allegations of violations and for providing recommendations for action to the chair of the responsible major unit. If a violation is verified, and if, in the judgement of the Committee, the extent of the violation requires additional action, the Committee may recommend that the subject petitioner have his/her petition revoked.
  - Following a recommendation of the Election Oversight Committee, the President may terminate a petition in the IEEE Annual Election, in line with the process outlined in IEEE Bylaw I-307.16
  - The head of the responsible major organizational unit may terminate a petition upon recommendation by the Election Oversight Committee that includes guidance concerning any necessary additional approvals of termination decisions, and opportunity for appeal by the petitioner.

## Reference Information

- IEEE Annual Election website [www.ieee.org/elections](http://www.ieee.org/elections)
- IEEE Governing Documents [https://www.ieee.org/about/corporate/governance/governance\\_index.html](https://www.ieee.org/about/corporate/governance/governance_index.html)
  - IEEE Bylaw I-307 Nominations and Elections [https://www.ieee.org/documents/ieee\\_constitution\\_and\\_bylaws.pdf](https://www.ieee.org/documents/ieee_constitution_and_bylaws.pdf)
  - IEEE Policies [https://www.ieee.org/documents/ieee\\_policies.pdf](https://www.ieee.org/documents/ieee_policies.pdf)
    - Section 13.3 Elections and Electioneering
    - Section 13.7 Nominations and Elections – Ballot Material
    - Section 14.1 Use and Control of IEEE Mailing Lists
- IEEE Code of Ethics <https://www.ieee.org/about/corporate/governance/p7-8.html>
- IEEE Code of Conduct [https://www.ieee.org/about/ieee\\_code\\_of\\_conduct.pdf](https://www.ieee.org/about/ieee_code_of_conduct.pdf)
- IEEE Social Media home page [https://www.ieee.org/about/social\\_media/index.html](https://www.ieee.org/about/social_media/index.html)
- IEEE Email Terms and Conditions [https://www.ieee.org/membership\\_services/membership/products/ieee\\_email\\_policy.html](https://www.ieee.org/membership_services/membership/products/ieee_email_policy.html)