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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

Approved by Tellers Committee on 12 October 2020.

1 May 2020	<p>Constitutional Amendment Petitions</p> <p>Individuals may begin to circulate a petition to amend the IEEE Constitution, to be included with the 2021 IEEE Annual Election. Petitioners must submit in writing to IEEE a copy of the exact language of amendment. (<i>See IEEE Policies, Section 13.7.3.A for word count</i>) (<i>Date is mandated by IEEE Bylaw I-308.1.(b)</i>) (The last day to submit is 11 December 2020.)</p> <p>Candidate Petitions</p> <p>Individual members who wish to circulate a petition to be added to the ballot for offices that appear on the 2021 IEEE Annual Election ballot shall submit a petition draft to the Board of Directors. The petition draft must be accompanied by a statement by the proposed candidate that he or she is willing to serve if elected. (<i>Date mandated by IEEE Policies, Section 13.7.3.</i>) (The last day to submit petition intention is 15 April 2021.)</p>
15 May 2020	<p>Candidate Petitions</p> <p>The first day qualified petitioners may circulate the petition and collect signatures to be added to the ballot for offices that appear on the 2021 IEEE Annual Election ballot. (<i>Date mandated by IEEE Policies, Section 13.7.3.A.</i>) (The last day for petition signatures is 8 May 2021.)</p>
11 December 2020 (12:00 PM ET/17:00 UTC)	<p>Constitutional Amendment Petitions</p> <p>The last day of a petition for a Constitutional Amendment may be submitted to be circulated to the membership. (<i>Date mandated by IEEE Bylaw I-308.1.(b)</i>)</p>
15 March 2021	<p>Annual Election</p> <p>The slate of nominated candidates for inclusion in the 2021 IEEE Annual Election must be received by the IEEE Board of Directors. (<i>Date mandated by IEEE Bylaw I-307.7.</i>)</p> <p>Submit slates to annual_election@ieee.org.</p>
9 April 2021 (12:00 PM ET/17:00 UTC)	<p>Constitutional Amendment Petitions</p> <p>The last day for the collection of signatures on amendment petitions for the 2021 IEEE Annual Election ballot. (<i>Date mandated by IEEE Policy 13.7.3.A., see IEEE Constitution, Article XIV – Amendments, Section 1 for the calculation of petition signatures needed</i>)</p>
15 April 2021	<p>Annual Election</p> <p>The last day individual members who wish to circulate a petition to be added to the ballot for offices that appear on the 2021 IEEE Annual Election ballot can submit their intention to petition to the IEEE Board of Directors. (<i>Date mandated by IEEE Policy 13.7.3.A.</i>)</p> <p>Submit petition draft to annual_election@ieee.org.</p>

16 April 2021	<p>Candidate Statements</p> <p>The last day for election staff to receive candidate biographies and statements within the specified number of words from candidates. <i>(Date mandated by IEEE Policies, Section 13.7.1.A.)</i></p> <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 2021*.</p> <p>Materials due:</p> <ul style="list-style-type: none"> • Biography • IEEE Accomplishments and Activities • Candidate Statement • Candidate photograph taken after 16 August 2019 <p>All materials must be in standard English.</p> <p>Optional for all candidates:</p> <ul style="list-style-type: none"> • Personal candidate website URL for inclusion in the ballot materials <p>Optional for IEEE President-Elect, IEEE Standards Association President-Elect, IEEE Technical Activities Vice President-Elect, and IEEE-USA President-Elect candidates:</p> <ul style="list-style-type: none"> • Pre-recorded 60-second candidate video message <p><i>*Individuals who have been successful in their nomination by petition shall submit their materials within ten working days following the petition result announcement by the IEEE Tellers Committee.</i></p> <p>Submit materials to annual_election@ieee.org.</p>
1 May 2021	<p>Constitutional Amendment Petitions</p> <p>The last day for the IEEE Tellers Committee to announce the tally of the petition signatures in a report to the IEEE Board of Directors. <i>(Date mandated by IEEE Bylaw I-305.21.)</i></p> <p>Voting Members Candidate Notification</p> <p>The Board of Directors submit to all voting members on or before 1 May of each year a list of officers to be elected for the coming term <i>(Date mandated by IEEE Bylaw, I-307.9.)</i></p>
14 May 2021 (12:00 PM ET/16:00 UTC)	<p>Candidate Petitions</p> <p>The last day for the collection of petition signatures for an office on 2021 IEEE Annual Election ballot. <i>(Date mandated by IEEE Bylaw I-307.10; see Bylaw I-307.10. Petition Candidates for the calculation of signatures needed)</i></p> <p>Submit all petition signatures for processing to annual_election@ieee.org.</p>

2021 IEEE Annual Election
Guidelines for Candidates and Petitioners in the IEEE Annual Election

1 June 2021	<p>Constitutional Amendment Petitions</p> <p>The first day the Board of Directors may endorse or oppose a referendum. <i>(Date is mandated by IEEE Bylaw I-308.1.b)</i></p> <p>The Board of Directors or member petition may place statements in favor of or in opposition to Amendments placed on the annual election ballot. The statements must be received at the office of the IEEE Executive Director <i>(Date is mandated by IEEE Bylaw I-308.6.)</i> (Deadline is not later than the first working day following 30 June of the election year)</p>
7 June 2021	<p>Candidate Petitions</p> <p>The last day for the IEEE Tellers Committee to announce the tally of the petition signatures in a report to the IEEE Board of Directors. <i>(Date is mandated by IEEE Bylaw I-305.21.)</i> (Petition signatures tally shall be announced not later than 15 working days following petition signatures deadline)</p>
By 11 June 2021 (12:00 PM ET/16:00 UTC)	<p>Final Approval of Candidate Materials</p> <p>Approval of the final copy of candidate materials must be received by the election staff. Approved materials not received by the deadline will be omitted from the election materials provided to the membership. <i>(Date mandated by IEEE Policies, Section 13.7.2)</i></p> <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>Submit material approvals to annual_election@ieee.org.</p>
30 June 2021	<p>Annual Election</p> <p>Ballots will be created for eligible voting members on record. <i>(Date mandated by IEEE Bylaw I-307.12)</i></p>
1 July 2021	<p>Constitutional Amendment Petitions</p> <p>The last day the Board of Directors may endorse or oppose a referendum to the voting members. <i>(Date is mandated by IEEE Bylaw I-308.1.(a))</i> (The first day to submit is the first working day following 31 May of the election year)</p> <p>The last day the statements in favor of or in opposition to Amendments placed on the annual election ballot by IEEE Board of Directors or member petition shall be received at the office of the IEEE Executive Director. <i>(Date is mandated by IEEE Bylaw I-308.6.)</i></p>
1 August 2021	<p>Constitutional Amendment</p> <p>If not already completed, communication of Proposed Constitutional Amendment(s) is provided to all the voting members. <i>(Date is mandated by IEEE Constitution, Article XIV, Section 1.)</i></p>

2021 IEEE Annual Election
Guidelines for Candidates and Petitioners in the IEEE Annual Election

16 August 2021	<p>Annual Election</p> <p>Annual Election ballots are distributed to all eligible voting members, including finalized amendment statements and rebuttals, if applicable. <i>(Date is mandated by IEEE Bylaw I-307.12.)</i></p>
1 October 2021 (12:00 PM ET/16:00 UTC)	<p>Annual Election</p> <p>Last day for votes to be received from voting members. <i>(Date is mandated by IEEE Bylaw I-307.15.)</i></p>
15 October 2021	<p>Annual Election</p> <p>Last day votes can be tallied by the IEEE Tellers Committee. <i>(Date mandated by IEEE Bylaw I-307.15.)</i> (Ballots shall be validated and tallied not later than the tenth working day following the final election ballot receipt date)</p> <p>Last day for announcements of vote tallies by IEEE Tellers Committee to IEEE Board of Directors. <i>(Date mandated by IEEE Bylaw I-307.15.)</i> (The announcement of the tally of the votes is not later than the tenth working day following the final election ballot receipt date)</p>
30 October 2021	<p>Constitutional Amendment</p> <p>A challenge to the result of the Constitutional Amendment (a “referendum”) may be made by any voting member in writing to the IEEE President, with copies to the IEEE Executive Director at the IEEE Operations Center <i>(Date mandated by IEEE Bylaw I-307.19.)</i> (Deadline is not later than 15 days after the publication of the tally of votes)</p> <p>Annual Election</p> <p>A challenge of an election may be made by a candidate in writing to be received at IEEE Headquarters setting forth the activity alleged to be in violation of the IEEE Constitution, Bylaws, or Policies that took place prior to the final election ballot receipt date and that is alleged to have materially compromised such election <i>(Date is mandated by IEEE Bylaw I-307.19.)</i></p> <p>A challenge of a recall election may be made by a person who is the subject of the recall election in a written complaint to be received at IEEE Headquarters setting forth the activity alleged to be in violation of the IEEE Constitution, Bylaws, or Policies that took place prior to the final election ballot receipt date and that is alleged to have materially compromised such election <i>(Date is mandated by IEEE Bylaw I-307.19.)</i></p>

Candidate Biographical Materials

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

All nominated candidates are requested to provide their biographical materials by 16 April 2021.

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.

1. Candidate photograph:

- Photograph must be taken on or after 16 August 2019
- As required by IEEE Policy, candidates are required to attest to the age of the photograph (short email stating when or that the photograph was taken after 16 August 2019)
- 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 of IEEE
- It is recommended that biographies be written 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
- Acceptable 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 cannot exceed the following:

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
Women in Engineering Committee Chair-Elect	150 words
Referendum Statements	Statement Length
Initiator's Official Statement	200 words
Forum Consensus Support Statement	200 words
Forum Consensus Opposition Statement	200 words
Board of Directors Statement	200 words

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

5. Personal website URL (optional for all candidates):

- IEEE will not host or support personal candidate websites.
- Candidate materials (print and electronic) will include the link to one personal candidate website URL if it is provided by the candidate:
- Personal websites 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 to the amount of material or information posted on personal candidate websites.

6. Personal candidate video message (optional for select office positions):

Candidates for IEEE President-Elect, IEEE Standards Association President-Elect, IEEE Technical Activities Vice President-Elect, and IEEE-USA President-Elect offices may provide an optional pre-recorded video message for inclusion in the ballot materials. Candidates will be responsible for recording their video message.

- Videos length to not exceed 60-seconds, and the video format must be an .mp4 file at 720p HD resolution
- IEEE will insert the video introduction graphic that will list the candidate name, office position, photograph, and relevant election ballot information

For the candidates who choose to not provide a video, ballot material and communications will note that the candidate did not provide an optional video message.

Review and Approval of Candidate Materials

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 determine 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 IEEE President for adjudication. The

IEEE 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.

Upon 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.A.](#))

Constitutional Amendment Petitions

Constitutional Amendments may be placed on the annual election ballot by the IEEE Board of Directors or by member petition. ([IEEE Bylaw I-308 Amendments to IEEE Constitution and Bylaws](#))

Determining 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.C.](#)):

- 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](#)).

Candidates offered the opportunity to be published in any IEEE publication (print or electronic) in connection with their candidacy, shall request that their 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 election campaign guidelines.

Members may be informed of the candidates' views and of issues pertaining to initiatives through electronic messages sent by the candidate to potential voters, 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 Policies, Section 13.3 Elections and Electioneering](#) provides guidance to editors and conference organizers on how campaign material is distributed (in-person, via e-mail, on-line, in publications and in IEEE meetings.) It also explains the handling of presentations at 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 ([IEEE Policies, Section 14 – IEEE Mailing Lists and Rosters](#)) 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 ([IEEE Policies, Section 14.1 – Use and Control of IEEE Mailing Lists](#))
- Avoid practices that would be interpreted by a reasonably prudent person as obtrusive or failing 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 IEEE 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 and campaigning 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-307.17. Oversight for Election Irregularities](#))

The IEEE Election Oversight Committee and IEEE's Staff can be contacted at corp-electioneering@ieee.org.

Violations of IEEE Election Campaign Policies by Candidates and Other Members

Electronic election campaigning processes and adherence to the guidelines will be monitored during the election year. Alleged violations of IEEE electioneering and campaigning 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 the 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 IEEE 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 the 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 IEEE 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 General 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 mailing lists may not be used by IEEE Annual Election candidates for election campaign purposes ([Policy 14.1](#))

Candidates whose names appear on a slate in the IEEE Annual Election will have their candidate statements distributed to the pertinent electorate using an IEEE mailing list via electronic distribution means determined and coordinated by IEEE Corporate Governance staff. Candidates will not have access to the mailing lists of the electorates.

Provisions for candidates in the IEEE Annual Election are extended to initiators of Constitutional Amendments.

Conferences/Meetings and Publications Invitations and Requests

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 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 candidate 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.

Organizers of conferences and meetings may arrange public discussions and presentations related to Constitutional Amendments and referendums adhering to the following guidelines ([IEEE Policies, Section 13.D.4](#)):

- a) Equal opportunity shall be given to the individuals who support or oppose the referendum proposals to express their views.
- b) The presentations shall not include statements from IEEE Organizational Units. Individuals, including members of the Board of Directors and leadership from the Organizational Units, are encouraged to participate in the discussion without endorsing or opposing, in order to ensure IEEE members are well-informed. Notwithstanding the foregoing, if the Board of Directors has previously adopted a motion endorsing or opposing a Constitutional Amendment or referendum, members of the Board of Directors may not participate in the discussion in a way that undermines the motion of the Board of Directors.
- c) 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 candidate 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.5](#)):

- a) all candidates shall be given at least fourteen (14) days to respond to the request for written material;
- b) candidates shall be given at least forty-five (45) days to prepare the requested written material, inclusive of the fourteen (14) days allotted for response in D.5.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.

Editors of IEEE publications who plan to publish material related to referendums shall adhere to the following guidelines ([IEEE Policies, Section 13.D.6.](#)):

- a) Equal opportunity shall be given to individuals who support or oppose the referendum to express their views.
- b) The published material shall not include statements from IEEE Organizational Units, but from individuals only, with up to one IEEE volunteer title (current or past), if applicable.
- c) If the IEEE Board of Directors has previously adopted a motion endorsing or opposing a Constitutional Amendment or referendum, members of the IEEE Board of Directors may not publish statements that undermine the motion of the IEEE Board of Directors.

Editorials, Support/Opposition Articles and Endorsements

Editorials concerning candidates: 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.

Editorials concerning referendums Editorials and support or opposition articles about Constitutional Amendments and other referendums are permitted, provided that the following are adhered to:

- Equal opportunity shall be given to individuals who support or oppose to express their views.
- The editorials and support or opposition articles shall not include official statements from IEEE Organizational Units. Individuals including members from the Board of Directors and leadership from Organizational Units, are encouraged to participate in the discussion without endorsing or opposing, in order to ensure IEEE members are well informed. Notwithstanding the foregoing, if the Board of Directors has previously adopted a motion endorsing or opposing a Constitutional Amendment or referendum, members of the Board of Directors may not participate in the discussion in a way that undermines the motion of the Board of Directors.

Non-Election Campaigning 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.

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 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.

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.

To the extent practicable, organizers are obligated to provide individuals who support or oppose a referendum proposal with the same opportunity to distribute their materials. Organizers are not obligated to contact individuals with interest in distributing material on a referendum.

The Election Oversight Committee shall serve as a resource for conference organizers and volunteers to address questions regarding implementation issues.

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

[IEEE Email Terms and Conditions](#) shall be followed during IEEE election campaigns.

Candidates or candidate supporters may not use the IEEE membership database, or any derivative thereof (for example, IEEE Organizational Unit Analytics, rosters) or any resources 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 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., society_news@ieee.org, 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
 - Candidates shall not send any electioneering or campaigning type communications to group aliases or IEEE Online Communities. Candidates who choose to send notifications to colleagues, must take affirmative steps to ensure and be able to demonstrate that the email is welcomed. Recipients must be informed to not forward such notification or any election related e-mails to other members by using an "@ieee.org" email distribution alias list.
- In all communication with potential voters, candidates and their supporters shall:
 - 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";
 - 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"***
 - ***"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](#)
 - [IEEE Code of Conduct](#)
 - [IEEE Policies, Section 14.1 – Use and Control of IEEE Mailing Lists](#)
 - [IEEE Email Terms and Conditions](#)

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. As defined in [IEEE Policies, Section 9.28](#), “social media” are defined as any forms of electronic communications, such as websites, portals or mobile applications, that allow individuals to post and share content publicly and/or to a select group of individuals in virtual communities and networks, and that allow other individuals to view, respond to and share this content further. These social media include digital and mobile-based applications that allow for music, image, audio and video sharing; blogging and microblogging; review and opinion sharing; location-based, event-based and occupation-based networks; information and news aggregation; presentation sharing; advocacy and fundraising; creation of virtual worlds; and all-purpose wide-appeal networks geared toward general audiences. Examples of well-known social media outlets in which IEEE regularly participates are Facebook, Twitter, YouTube, and LinkedIn.

Election Petitions

In accordance with [IEEE Bylaw I-307.10](#), 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.](#)) 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 IEEE Legal and Compliance Department, the IEEE President, in consultation with the IEEE Secretary and the IEEE Executive Director, 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 Eastern Time USA on the Friday preceding 15 May of the year of the election (14 May 2021). ([IEEE Bylaw I-307.10 Petition Candidates](#))

All individuals seeking nomination by petition shall follow the same election campaign 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 campaigning 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 Chair 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.

Constitutional Amendments may be placed on the annual election ballot by the IEEE Board of Directors or by member petition. Please refer to [IEEE Bylaw I-308. Amendments to IEEE Constitution and Bylaws](#).

Reference Information

- [IEEE Annual Election website](#)
- [IEEE Governing Documents](#)
 - [IEEE Bylaws](#)
 - I-307 Nominations and Elections
 - I-308 Amendments to IEEE Constitution and Bylaws
 - [IEEE Policies](#)
 - Section 9.28 Social Media Policy
 - 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](#)
- [IEEE Code of Conduct](#)
- [IEEE Email Terms and Conditions](#)