

**Return of Organization Exempt From Income Tax**

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

**2022**

Department of the Treasury  
Internal Revenue Service

Do not enter social security numbers on this form as it may be made public.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

**Open to Public Inspection**

**A For the 2022 calendar year, or tax year beginning** , 2022, and ending , 20

**B** Check if applicable:  
 Address change  
 Name change  
 Initial return  
 Final return/terminated  
 Amended return  
 Application pending

**C** Name of organization **INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS, INC.**  
 Doing business as **IEEE**

**D** Employer identification number  
13-1656633

Number and street (or P.O. box if mail is not delivered to street address) Room/suite  
**445 HOES LANE**

**E** Telephone number  
(732) 981-0060

City or town, state or province, country, and ZIP or foreign postal code  
**PISCATAWAY, NJ 08854**

**F** Name and address of principal officer: **SOPHIA MUIRHEAD**  
**SAME AS C ABOVE**

**H(a)** Is this a group return for subordinates?  Yes  No  
**H(b)** Are all subordinates included?  Yes  No  
 If "No," attach a list. See instructions.

**G** Gross receipts \$ **1,255,151,203**

**I** Tax-exempt status:  501(c)(3)  501(c) ( ) (insert no.)  4947(a)(1) or  527

**J** Website: **WWW.IEEE.ORG**

**H(c)** Group exemption number **2038**

**K** Form of organization:  Corporation  Trust  Association  Other

**L** Year of formation: **1896**

**M** State of legal domicile: **NY**


**Part I Summary**

|                                    |   |   |                                  |                     |
|------------------------------------|---|---|----------------------------------|---------------------|
| <b>Activities &amp; Governance</b> | <b>1</b>  | Briefly describe the organization's mission or most significant activities: <b>IEEE IS COMMITTED TO STRENGTHENING AND EMPOWERING ITS MEMBERS AS TECHNOLOGY PROFESSIONALS WHILE SUPPORTING OUR MISSION TO FOSTER (CONTINUED ON SCHEDULE O)</b> |                                  |                     |
|                                    | <b>2</b>  | Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.   |                                  |                     |
|                                    | <b>3</b>  | Number of voting members of the governing body (Part VI, line 1a)   | <b>3</b>                         | 31                  |
|                                    | <b>4</b>  | Number of independent voting members of the governing body (Part VI, line 1b)   | <b>4</b>                         | 30                  |
|                                    | <b>5</b>  | Total number of individuals employed in calendar year 2022 (Part V, line 2a)  | <b>5</b>                         | 1,209               |
|                                    | <b>6</b>  | Total number of volunteers (estimate if necessary)  | <b>6</b>                         | 100,000             |
|                                    | <b>7a</b>   | Total unrelated business revenue from Part VIII, column (C), line 12  | <b>7a</b>                        | 10,999,306          |
| <b>b</b>                           | Net unrelated business taxable income from Form 990-T, Part I, line 11    | <b>7b</b>   | 0                                |                     |
| <b>Revenue</b>                     | <b>8</b>  | Contributions and grants (Part VIII, line 1h)   | <b>Prior Year</b>                | <b>Current Year</b> |
|                                    | <b>9</b>  | Program service revenue (Part VIII, line 2g)  | 1,747,229                        | 2,830,002           |
|                                    | <b>10</b>   | Investment income (Part VIII, column (A), lines 3, 4, and 7d)   | 451,114,223                      | 527,424,157         |
|                                    | <b>11</b>   | Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)  | 52,230,642                       | 23,881,014          |
|                                    | <b>12</b>   | Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)  | 19,703,759                       | 12,295,285          |
|                                    | <b>12</b>   |   | 524,795,853                      | 566,430,458         |
| <b>Expenses</b>                    | <b>13</b>   | Grants and similar amounts paid (Part IX, column (A), lines 1–3)  | 5,024,067                        | 6,777,824           |
|                                    | <b>14</b>   | Benefits paid to or for members (Part IX, column (A), line 4)   | 0                                | 0                   |
|                                    | <b>15</b>   | Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)   | 177,909,503                      | 184,465,611         |
|                                    | <b>16a</b>  | Professional fundraising fees (Part IX, column (A), line 11e)   | 0                                | 0                   |
|                                    | <b>b</b>  | Total fundraising expenses (Part IX, column (D), line 25)   | 1,974,059                        |                     |
|                                    | <b>17</b>   | Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)  | 199,308,153                      | 281,002,071         |
| <b>18</b>                          | Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25) | 382,241,723   | 472,245,506                      |                     |
| <b>19</b>                          | Revenue less expenses. Subtract line 18 from line 12                      | 142,554,130   | 94,184,952                       |                     |
| <b>Net Assets or Fund Balances</b> | <b>20</b>   | Total assets (Part X, line 16)  | <b>Beginning of Current Year</b> | <b>End of Year</b>  |
|                                    | <b>21</b>   | Total liabilities (Part X, line 26)   | 1,163,553,159                    | 1,142,179,318       |
|                                    | <b>22</b>   | Net assets or fund balances. Subtract line 21 from line 20  | 258,489,129                      | 262,476,837         |
| <b>22</b>                          |   | 905,064,030   | 879,702,481                      |                     |

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

**Sign Here**

Signature of officer:  Date: **11/10/23**

THOMAS R SIEGERT, ASSISTANT TREASURER & CFO

Type or print name and title

**Paid Preparer Use Only**

Print/Type preparer's name Preparer's signature Date Check  if self-employed PTIN

Firm's name Firm's EIN

Firm's address Phone no.

May the IRS discuss this return with the preparer shown above? See instructions  Yes  No

Form **8868**  
(Rev. January 2022)

# Application for Automatic Extension of Time To File an Exempt Organization Return

OMB No. 1545-0047

Department of the Treasury  
Internal Revenue Service

▶ **File a separate application for each return.**  
▶ **Go to [www.irs.gov/Form8868](http://www.irs.gov/Form8868) for the latest information.**

**Electronic filing (e-file).** You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits](http://www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits).

**Automatic 6-Month Extension of Time.** Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

|  |  |  |
|--|--|--|
| <b>Type or print</b>   | Name of exempt organization or other filer, see instructions.<br>INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS, INC. | Taxpayer identification number (TIN)<br><br>13-1656633 |
| File by the due date for filing your return. See instructions. | Number, street, and room or suite no. If a P.O. box, see instructions.<br>445 HOES LANE                                  |  |
|  | City, town or post office, state, and ZIP code. For a foreign address, see instructions.<br>PISCATAWAY, NJ 08854         |  |

Enter the Return Code for the return that this application is for (file a separate application for each return) 0 1

| Application Is For                       | Return Code | Application Is For                | Return Code |
|--|-------------|-----------------------------------|-------------|
| Form 990 or Form 990-EZ                  | 01          | Form 1041-A                       | 08          |
| Form 4720 (individual)                   | 03          | Form 4720 (other than individual) | 09          |
| Form 990-PF                              | 04          | Form 5227                         | 10          |
| Form 990-T (sec. 401(a) or 408(a) trust) | 05          | Form 6069                         | 11          |
| Form 990-T (trust other than above)      | 06          | Form 8870                         | 12          |
| Form 990-T (corporation)                 | 07          |                                   |             |

IEEE CONTROLLER OFFICE

- The books are in the care of ▶ 445 HOES LANE - PISCATAWAY, NJ 08854

Telephone No. ▶ 732-981-0060

Fax No. ▶ 732-562-6832

- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box . If it is for part of the group, check this box  and attach a list with the names and TINs of all members the extension is for.

**1** I request an automatic 6-month extension of time until NOVEMBER 15, 2023, to file the exempt organization return for the organization named above. The extension is for the organization's return for:  
 ▶  calendar year 2022 or  
 ▶  tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_.

**2** If the tax year entered in line 1 is for less than 12 months, check reason:  Initial return  Final return  
 Change in accounting period

|   |           |    |    |
|---|-----------|----|----|
| <b>3a</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.   | <b>3a</b> | \$ | 0. |
| <b>b</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit. | <b>3b</b> | \$ | 0. |
| <b>c Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.              | <b>3c</b> | \$ | 0. |

**Caution:** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-TE and Form 8879-TE for payment instructions.

LHA **For Privacy Act and Paperwork Reduction Act Notice, see instructions.**

Form **8868** (Rev. 1-2022)

MAIL TO: DEPARTMENT OF THE TREASURY  
INTERNAL REVENUE SERVICE CENTER  
OGDEN, UT 84201-0045



**Part III Statement of Program Service Accomplishments**

Check if Schedule O contains a response or note to any line in this Part III  Yes  No

**1** Briefly describe the organization's mission:

MISSION STATEMENT: IEEE'S CORE PURPOSE IS TO FOSTER TECHNOLOGICAL INNOVATION AND EXCELLENCE FOR THE BENEFIT OF HUMANITY.

(CONTINUED ON SCHEDULE O)

**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?  Yes  No

If "Yes," describe these new services on Schedule O.

**3** Did the organization cease conducting, or make significant changes in how it conducts, any program services?  Yes  No

If "Yes," describe these changes on Schedule O.

**4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

**4a** (Code: ) (Expenses \$ 159,004,410 including grants of \$ 0 ) (Revenue \$ 239,872,575 )

PERIODICALS:

THE IEEE XPLORER DIGITAL LIBRARY IS ONE OF THE WORLD'S LARGEST COLLECTIONS OF TECHNICAL LITERATURE IN ENGINEERING, COMPUTER SCIENCE AND RELATED TECHNOLOGIES WITH OVER 5.8 MILLION DOCUMENTS AVAILABLE IN ITS VAST REPOSITORY. IEEE CONTINUES TO DELIVER GROUNDBREAKING RESEARCH IN ITS INDUSTRY-LEADING PUBLICATIONS AND SHARE ITS TECHNICAL EXPERTISE AROUND THE WORLD ON THE TECHNOLOGIES THAT WILL SHAPE THE FUTURE. IN 2022, IEEE PUBLISHED 222,106 CONFERENCE ARTICLES AND 81,921 JOURNAL AND MAGAZINE ARTICLES. IEEE'S PUBLISHING PROGRAM CONTINUES TO GROW AND EVOLVE FOR BOTH SUBSCRIPTION JOURNALS AND OPEN ACCESS TITLES.

REPRESENTING A MAJOR STEP IN IEEE'S CONTINUED SUPPORT AND COMMITMENT TO OPEN SCIENCE, IEEE PLEDGED TO MAKE ITS ENTIRE COLLECTION OF OVER 160 HYBRID JOURNALS - THOSE PUBLISHING BOTH OPEN (CONTINUED ON SCHEDULE O)

**4b** (Code: ) (Expenses \$ 146,057,361 including grants of \$ 4,035 ) (Revenue \$ 189,378,768 )

CONFERENCES:

IEEE CONFERENCES HELPED LEAD THE POST-PANDEMIC RECOVERY WITH AN IN-PERSON AUDIENCE EAGER FOR FACE-TO-FACE ENGAGEMENT AND IMMERSIVE EXPERIENCES WHICH UNDERSCORES THE ENDURING IMPORTANCE OF FOSTERING COLLABORATION AND EXPLORATION IN THE TECHNICAL COMMUNITY. IN 2022, IEEE SPONSORED 2,008 CONFERENCES IN 106 COUNTRIES WORLDWIDE WITH OVER 534,000 ATTENDEES. VIRTUAL, IN-PERSON, AND HYBRID OPTIONS ENCOURAGED ACCESSIBLE, WIDESPREAD ENGAGEMENT GLOBALLY.

THE IEEE INTERNATIONAL CONFERENCE ON ROBOTICS AND AUTOMATION WAS HELD IN-PERSON FOR THE FIRST TIME IN THREE YEARS, IN PHILADELPHIA, PA, WITH OVER 7,800 PARTICIPANTS FROM 97 DIFFERENT COUNTRIES. THE EVENT FEATURED WORKSHOPS EXPLORING THE MANY WAYS IN WHICH ROBOTICS AND AUTOMATION ARE CHANGING THE FUTURE OF WORK - INCLUDING ROBOTIC REEF RESTORATION, MAKING ROBOTIC ART, AND (CONTINUED ON SCHEDULE O)

**4c** (Code: ) (Expenses \$ 106,450,208 including grants of \$ 6,773,789 ) (Revenue \$ 47,631,048 )

MEMBERSHIPS & PUBLIC IMPERATIVES:

IEEE IS A PUBLIC CHARITY DEDICATED TO ADVANCING TECHNOLOGY FOR THE BENEFIT OF HUMANITY. IN 2022, IEEE HAD A TOTAL OF 427,780 MEMBERS, FROM MORE THAN 190 COUNTRIES WORLDWIDE, INCLUDING 145,328 STUDENT MEMBERS (AN INCREASE OF 15% FROM PREVIOUS YEAR), AND 353,838 SOCIETY MEMBERS FROM THE 39 IEEE SOCIETIES. IEEE, AND ITS MEMBERS AND VOLUNTEERS, ARE COMMITTED TO ADDRESSING EMERGING CHALLENGES AND PROMOTING TECHNOLOGICAL INNOVATION FOR THE BETTERMENT OF SOCIETY. THROUGHOUT 2022, IEEE SUPPORTED MEMBER ENGAGEMENT, FOSTERED A GLOBAL CULTURE THAT IS DIVERSE, INCLUSIVE, AND RESPECTFUL, AND COLLABORATED WITH GLOBAL COMMUNITIES IN MEANINGFUL PROJECTS TO SUPPORT OUR MISSION.

IEEE'S COMMITMENT TO SCIENTIFIC AND TECHNOLOGICAL DISCOVERY AND INNOVATION DRIVES OUR FOCUS ON (CONTINUED ON SCHEDULE O)

**4d** Other program services (Describe on Schedule O.)

(Expenses \$ 44,422,587 including grants of \$ 0 ) (Revenue \$ 43,373,783 )

**4e** Total program service expenses 455,934,566

**Part IV Checklist of Required Schedules**

|   | Yes                                 | No                                  |
|---|-------------------------------------|-------------------------------------|
| <b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A . . . . .</i>   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>2</b> Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? See instructions . . . . .  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I . . . . .</i>  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>4</b> <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II . . . . .</i>   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>5</b> Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? <i>If "Yes," complete Schedule C, Part III . . . . .</i>  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>6</b> Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I . . . . .</i>  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II . . . . .</i>  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III . . . . .</i>   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>9</b> Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV . . . . .</i>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>10</b> Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? <i>If "Yes," complete Schedule D, Part V . . . . .</i>   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>11</b> If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.  |                                     |                                     |
| <b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI . . . . .</i>   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>b</b> Did the organization report an amount for investments—other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII . . . . .</i>  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>c</b> Did the organization report an amount for investments—program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII . . . . .</i>  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>d</b> Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX . . . . .</i>   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X . . . . .</i>   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>f</b> Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X . . . . .</i>  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII . . . . .</i>  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional . . . . .</i>   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E . . . . .</i>  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States? . . . . .  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV . . . . .</i> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV . . . . .</i>   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV . . . . .</i>   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>17</b> Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I. See instructions . . . . .</i>   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II . . . . .</i>   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III . . . . .</i>   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>20a</b> Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H . . . . .</i>   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? . . . . .   | <input type="checkbox"/>            | <input type="checkbox"/>            |
| <b>21</b> Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II . . . . .</i>  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |

**Part IV Checklist of Required Schedules** *(continued)*

|   | Yes                                 | No                                  |
|---|-------------------------------------|-------------------------------------|
| <b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i> . . . . .  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i> . . . . .  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i> . . . . .  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? . . . . .  | <input type="checkbox"/>            | <input type="checkbox"/>            |
| <b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? . . . . .   | <input type="checkbox"/>            | <input type="checkbox"/>            |
| <b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? . . . . .  | <input type="checkbox"/>            | <input type="checkbox"/>            |
| <b>25a</b> <b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i> . . . . .   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i> . . . . .   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>26</b> Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part II</i> . . . . .   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>27</b> Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i> . . . . . | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>28</b> Was the organization a party to a business transaction with one of the following parties (see the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions):  |                                     |                                     |
| <b>a</b> A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>b</b> A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>c</b> A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i> . . . . .   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i> . . . . .   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> . . . . .   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i> . . . . .   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i> . . . . .   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i> . . . . .   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? . . . . .  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i> . . . . .   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i> . . . . .  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i> . . . . .  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>38</b> Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? <b>Note:</b> All Form 990 filers are required to complete Schedule O . . . . .   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |

**Part V Statements Regarding Other IRS Filings and Tax Compliance**

Check if Schedule O contains a response or note to any line in this Part V

|   | Yes                                 | No                       |
|---|-------------------------------------|--------------------------|
| <b>1a</b> Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable . . . . .  |                                     |                          |
| <b>b</b> Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable . . . . .  |                                     |                          |
| <b>c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? . . . . . | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

| <b>Part V Statements Regarding Other IRS Filings and Tax Compliance</b> <i>(continued)</i> |   | Yes        | No    |   |   |
|--|---|------------|-------|---|---|
| <b>2a</b>  | Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return   | <b>2a</b>  | 1,209 |   |   |
| <b>b</b>   | If at least one is reported on line 2a, did the organization file all required federal employment tax returns?  | <b>2b</b>  |       | ✓ |   |
| <b>3a</b>  | Did the organization have unrelated business gross income of \$1,000 or more during the year?   | <b>3a</b>  |       | ✓ |   |
| <b>b</b>   | If "Yes," has it filed a Form 990-T for this year? <i>If "No" to line 3b, provide an explanation on Schedule O</i>  | <b>3b</b>  |       | ✓ |   |
| <b>4a</b>  | At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?    | <b>4a</b>  |       | ✓ |   |
| <b>b</b>   | If "Yes," enter the name of the foreign country <u>AS, CA, CH, IN, IT, JA, KE, KS, MY, SN, SP, UK</u><br>See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).                  |            |       |   |   |
| <b>5a</b>  | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?   | <b>5a</b>  |       |   | ✓ |
| <b>b</b>   | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?  | <b>5b</b>  |       |   | ✓ |
| <b>c</b>   | If "Yes" to line 5a or 5b, did the organization file Form 8886-T?   | <b>5c</b>  |       |   |   |
| <b>6a</b>  | Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?                                       | <b>6a</b>  |       |   | ✓ |
| <b>b</b>   | If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?   | <b>6b</b>  |       |   |   |
| <b>7</b>   | <b>Organizations that may receive deductible contributions under section 170(c).</b>  |            |       |   |   |
| <b>a</b>   | Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?   | <b>7a</b>  |       |   | ✓ |
| <b>b</b>   | If "Yes," did the organization notify the donor of the value of the goods or services provided?   | <b>7b</b>  |       |   |   |
| <b>c</b>   | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  | <b>7c</b>  |       |   | ✓ |
| <b>d</b>   | If "Yes," indicate the number of Forms 8282 filed during the year   | <b>7d</b>  |       |   |   |
| <b>e</b>   | Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?   | <b>7e</b>  |       |   | ✓ |
| <b>f</b>   | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  | <b>7f</b>  |       |   | ✓ |
| <b>g</b>   | If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?  | <b>7g</b>  |       |   |   |
| <b>h</b>   | If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?  | <b>7h</b>  |       |   |   |
| <b>8</b>   | <b>Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?  | <b>8</b>   |       |   |   |
| <b>9</b>   | <b>Sponsoring organizations maintaining donor advised funds.</b>  |            |       |   |   |
| <b>a</b>   | Did the sponsoring organization make any taxable distributions under section 4966?  | <b>9a</b>  |       |   |   |
| <b>b</b>   | Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?   | <b>9b</b>  |       |   |   |
| <b>10</b>  | <b>Section 501(c)(7) organizations.</b> Enter:  |            |       |   |   |
| <b>a</b>   | Initiation fees and capital contributions included on Part VIII, line 12  | <b>10a</b> |       |   |   |
| <b>b</b>   | Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities   | <b>10b</b> |       |   |   |
| <b>11</b>  | <b>Section 501(c)(12) organizations.</b> Enter:   |            |       |   |   |
| <b>a</b>   | Gross income from members or shareholders   | <b>11a</b> |       |   |   |
| <b>b</b>   | Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)   | <b>11b</b> |       |   |   |
| <b>12a</b>   | <b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?   | <b>12a</b> |       |   |   |
| <b>b</b>   | If "Yes," enter the amount of tax-exempt interest received or accrued during the year   | <b>12b</b> |       |   |   |
| <b>13</b>  | <b>Section 501(c)(29) qualified nonprofit health insurance issuers.</b>   |            |       |   |   |
| <b>a</b>   | Is the organization licensed to issue qualified health plans in more than one state?<br><b>Note:</b> See the instructions for additional information the organization must report on Schedule O.  | <b>13a</b> |       |   |   |
| <b>b</b>   | Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans   | <b>13b</b> |       |   |   |
| <b>c</b>   | Enter the amount of reserves on hand  | <b>13c</b> |       |   |   |
| <b>14a</b>   | Did the organization receive any payments for indoor tanning services during the tax year?  | <b>14a</b> |       |   | ✓ |
| <b>b</b>   | If "Yes," has it filed a Form 720 to report these payments? <i>If "No," provide an explanation on Schedule O</i>  | <b>14b</b> |       |   |   |
| <b>15</b>  | Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?<br>If "Yes," see the instructions and file Form 4720, Schedule N.                  | <b>15</b>  |       | ✓ |   |
| <b>16</b>  | Is the organization an educational institution subject to the section 4968 excise tax on net investment income?<br>If "Yes," complete Form 4720, Schedule O.  | <b>16</b>  |       |   | ✓ |
| <b>17</b>  | <b>Section 501(c)(21) organizations.</b> Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952, or 4953?<br>If "Yes," complete Form 6069. | <b>17</b>  |       |   |   |

**Part VI Governance, Management, and Disclosure.** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions. Check if Schedule O contains a response or note to any line in this Part VI

**Section A. Governing Body and Management**

|           |  | Yes                                 | No                                  |
|-----------|--|-------------------------------------|-------------------------------------|
| <b>1a</b> | Enter the number of voting members of the governing body at the end of the tax year . . . . .<br>If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O. |                                     |                                     |
|           | <b>1a</b> 31   |                                     |                                     |
| <b>b</b>  | Enter the number of voting members included on line 1a, above, who are independent . . . . .   |                                     |                                     |
|           | <b>1b</b> 30   |                                     |                                     |
| <b>2</b>  | Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? . . . . .  |                                     | <input checked="" type="checkbox"/> |
| <b>3</b>  | Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person? . . . . .  |                                     | <input checked="" type="checkbox"/> |
| <b>4</b>  | Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? . . . . .   | <input checked="" type="checkbox"/> |                                     |
| <b>5</b>  | Did the organization become aware during the year of a significant diversion of the organization's assets? . . . . .   |                                     | <input checked="" type="checkbox"/> |
| <b>6</b>  | Did the organization have members or stockholders? . . . . .   | <input checked="" type="checkbox"/> |                                     |
| <b>7a</b> | Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? . . . . .   | <input checked="" type="checkbox"/> |                                     |
| <b>b</b>  | Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? . . . . .  | <input checked="" type="checkbox"/> |                                     |
| <b>8</b>  | Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:  |                                     |                                     |
| <b>a</b>  | The governing body? . . . . .  | <input checked="" type="checkbox"/> |                                     |
| <b>b</b>  | Each committee with authority to act on behalf of the governing body? . . . . .  | <input checked="" type="checkbox"/> |                                     |
| <b>9</b>  | Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O . . . . .   |                                     | <input checked="" type="checkbox"/> |

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

|            |  | Yes                                 | No                                  |
|------------|--|-------------------------------------|-------------------------------------|
| <b>10a</b> | Did the organization have local chapters, branches, or affiliates? . . . . .   | <input checked="" type="checkbox"/> |                                     |
| <b>b</b>   | If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? . . . . .   | <input checked="" type="checkbox"/> |                                     |
| <b>11a</b> | Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . . . . .  | <input checked="" type="checkbox"/> |                                     |
| <b>b</b>   | Describe on Schedule O the process, if any, used by the organization to review this Form 990. . . . .  |                                     |                                     |
| <b>12a</b> | Did the organization have a written conflict of interest policy? If "No," go to line 13 . . . . .  | <input checked="" type="checkbox"/> |                                     |
| <b>b</b>   | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? . . . . .  | <input checked="" type="checkbox"/> |                                     |
| <b>c</b>   | Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done . . . . .   | <input checked="" type="checkbox"/> |                                     |
| <b>13</b>  | Did the organization have a written whistleblower policy? . . . . .  | <input checked="" type="checkbox"/> |                                     |
| <b>14</b>  | Did the organization have a written document retention and destruction policy? . . . . .   | <input checked="" type="checkbox"/> |                                     |
| <b>15</b>  | Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?   |                                     |                                     |
| <b>a</b>   | The organization's CEO, Executive Director, or top management official . . . . .   | <input checked="" type="checkbox"/> |                                     |
| <b>b</b>   | Other officers or key employees of the organization . . . . .  | <input checked="" type="checkbox"/> |                                     |
|            | If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions. . . . .   |                                     |                                     |
| <b>16a</b> | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? . . . . .  |                                     | <input checked="" type="checkbox"/> |
| <b>b</b>   | If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? . . . . . |                                     |                                     |

**Section C. Disclosure**

- 17** List the states with which a copy of this Form 990 is required to be filed [AK, AL, AR, CA, \(CONTINUED ON SCHEDULE O\)](#)
- 18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
 Own website     Another's website     Upon request     Other (explain on Schedule O)
- 19** Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records.  
[IEEE CONTROLLER OFFICE, 445 HOES LANE, PISCATAWAY, NJ 08854, \(732\) 981-0060](#)

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response or note to any line in this Part VII

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

**1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

See the instructions for the order in which to list the persons above.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

| (A)<br>Name and title   | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position<br>(do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/ 1099-MISC/ 1099-NEC) | (E)<br>Reportable compensation from related organizations (W-2/ 1099-MISC/ 1099-NEC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|---|--|--|-----------------------|---------|--------------|------------------------------|--------|---|--|---|
|   |  | Individual trustee or director   | Institutional trustee | Officer | Key employee | Highest compensated employee | Former |   |  |   |
| (1) STEPHEN WELBY<br>ASSISTANT SECRETARY & EXECUTIVE DIRECTOR           | 40.0<br>1.0  |  |                       | ✓       |              |                              |        | 1,092,921   | 0  | 215,124   |
| (2) MARY WARD-CALLAN<br>MANAGING DIRECTOR TECH ACTIVITIES               | 40.0<br>0.0  |  |                       |         | ✓            |                              |        | 615,704   | 0  | 57,432  |
| (3) THOMAS SIEGERT<br>ASSISTANT TREASURER & CFO                         | 40.0<br>1.0  |  |                       | ✓       |              |                              |        | 582,541   | 0  | 51,225  |
| (4) KONSTANTINOS KARACHALIOS<br>MANAGING DIRECTOR OF IEEE STANDARDS     | 40.0<br>0.0  |  |                       |         | ✓            |                              |        | 571,790   | 0  | 39,900  |
| (5) FRANCIS STAPLES<br>SR DIRECTOR GLOBAL SALES & CUSTOMER OPERATIONS   | 40.0<br>0.0  |  |                       |         |              | ✓                            |        | 544,590   | 0  | 51,493  |
| (6) SOPHIA MUIRHEAD<br>GENERAL COUNSEL & CHIEF COMPLIANCE OFFICER       | 40.0<br>0.0  |  |                       |         |              | ✓                            |        | 526,802   | 0  | 57,180  |
| (7) EMILY CSERNICA<br>DIRECTOR NORTH AMERICAN SALES                     | 40.0<br>0.0  |  |                       |         |              | ✓                            |        | 508,200   | 0  | 50,167  |
| (8) PAUL CANNING<br>DIRECTOR INTERNATIONAL SALES                        | 40.0<br>0.0  |  |                       |         |              | ✓                            |        | 494,926   | 0  | 51,673  |
| (9) DONNA HOURICAN<br>STAFF EXECUTIVE, CORPORATE ACTIVITIES             | 40.0<br>0.0  |  |                       |         |              | ✓                            |        | 479,905   | 0  | 39,900  |
| (10) CHERIF AMIRAT<br>CHIEF INFORMATION OFFICER                         | 40.0<br>0.0  |  |                       |         |              | ✓                            |        | 428,032   | 0  | 51,295  |
| (11) KAREN HAWKINS<br>CHIEF MARKETING OFFICER                           | 40.0<br>0.0  |  |                       |         |              | ✓                            |        | 407,690   | 0  | 56,283  |
| (12) STEVEN HEFFNER<br>MANAGING DIRECTOR PUBLICATIONS                   | 40.0<br>0.0  |  |                       |         |              | ✓                            |        | 398,687   | 0  | 40,910  |
| (13) CECELIA JANKOWSKI<br>MANAGING DIRECTOR MEMBER & GEOUNIT ACTIVITIES | 40.0<br>0.0  |  |                       |         |              | ✓                            |        | 398,120   | 0  | 44,313  |
| (14) K. J. RAY LIU<br>IEEE PRESIDENT AND CEO                            | 10.0<br>0.0  | ✓  |                       | ✓       |              |                              |        | 0   | 0  | 0   |



**Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** (continued)

| (A)<br>Name and title   | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position<br>(do not check more than one box, unless person is both an officer and a director/trustee) |                          |                                     |                          |                              |                          | (D)<br>Reportable compensation from the organization (W-2/1099-MISC/1099-NEC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|---|--|--|--------------------------|-------------------------------------|--------------------------|------------------------------|--------------------------|---|--|---|
|   |  | Individual trustee or director   | Institutional trustee    | Officer                             | Key employee             | Highest compensated employee | Former                   |   |  |   |
| (15) SAIFUR RAHMAN<br>IEEE PRESIDENT-ELECT  | 10.0<br>0.0  | <input checked="" type="checkbox"/>  | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>     | <input type="checkbox"/> | 0   | 0  | 0   |
| (16) SUSAN LAND<br>IEEE PAST PRESIDENT  | 10.0<br>0.0  | <input checked="" type="checkbox"/>  | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>     | <input type="checkbox"/> | 0   | 0  | 0   |
| (17) JOHN W. WALZ<br>DIRECTOR & SECRETARY   | 10.0<br>0.0  | <input checked="" type="checkbox"/>  | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>     | <input type="checkbox"/> | 0   | 0  | 0   |
| (18) MARY ELLEN RANDALL<br>DIRECTOR & TREASURER                                       | 10.0<br>0.0  | <input checked="" type="checkbox"/>  | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>     | <input type="checkbox"/> | 0   | 0  | 0   |
| (19) STEPHEN M. PHILLIPS<br>DIRECTOR & VICE PRESIDENT, EDUCATIONAL ACTIVITIES         | 10.0<br>0.0  | <input checked="" type="checkbox"/>  | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>     | <input type="checkbox"/> | 0   | 0  | 0   |
| (20) LAWRENCE O. HALL<br>DIRECTOR & VICE PRESIDENT, PUBLICATION SERVICES AND PRODUCTS | 10.0<br>0.0  | <input checked="" type="checkbox"/>  | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>     | <input type="checkbox"/> | 0   | 0  | 0   |
| (21) DAVID A. KOEHLER<br>DIRECTOR & VICE PRESIDENT, MEMBER AND GEOGRAPHIC ACTIVITIES  | 10.0<br>0.0  | <input checked="" type="checkbox"/>  | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>     | <input type="checkbox"/> | 0   | 0  | 0   |
| (22) JAMES E. MATTHEWS<br>DIRECTOR & PRESIDENT, STANDARDS ASSOCIATION                 | 10.0<br>0.0  | <input checked="" type="checkbox"/>  | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>     | <input type="checkbox"/> | 0   | 0  | 0   |
| (23) BRUNO MEYER<br>DIRECTOR & VICE PRESIDENT, TECHNICAL ACTIVITIES                   | 10.0<br>0.0  | <input checked="" type="checkbox"/>  | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>     | <input type="checkbox"/> | 0   | 0  | 0   |
| (24) DEBORAH M. COOPER<br>DIRECTOR & PRESIDENT IEEE-USA                               | 10.0<br>0.0  | <input checked="" type="checkbox"/>  | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>     | <input type="checkbox"/> | 0   | 0  | 0   |
| (25) (SEE STATEMENT)  |  |  |                          |                                     |                          |                              |                          |   |  |   |
| <b>1b Subtotal</b>  |  |  |                          |                                     |                          |                              |                          | 7,049,908   | 0  | 806,895   |
| <b>c Total from continuation sheets to Part VII, Section A</b>                        |  |  |                          |                                     |                          |                              |                          | 0   | 0  | 0   |
| <b>d Total (add lines 1b and 1c)</b>  |  |  |                          |                                     |                          |                              |                          | 7,049,908   | 0  | 806,895   |

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization 585

|  | Yes                                 | No                                  |
|--|-------------------------------------|-------------------------------------|
| <b>3</b> Did the organization list any <b>former</b> officer, director, trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| <b>4</b> For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| <b>5</b> Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>                       | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |

**Section B. Independent Contractors**

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

| (A)<br>Name and business address  | (B)<br>Description of services            | (C)<br>Compensation |
|---|---|---------------------|
| DATA CONVERSION LABORATORY, INC., 61-18 190TH STREET, FRESH MEADOWS, NY 11365 | GRAPHIC CONVERSION, EDITING, XML TAGGING  | 5,122,695           |
| ORACLE AMERICA, INC, 500 ORACLE PARKWA REDWOOD SHORES, SAN MATEO, CA 94065    | FINANCIAL SYSTEM SUBSC. & MAINTENANCE     | 5,092,524           |
| IENERGIZER APTARA LIMITED, PO 13963, CHICAGO, IL 60693                        | XML & IMAGE CONVERSION & PAGE COMPOSITION | 4,458,580           |
| FINN PARTNERS, INC., 301 EAST 57TH ST., NEW YORK, NY 10022                    | COMMUNICATIONS MANAGEMENT (RESEARCH)      | 2,975,476           |
| IMEX GLOBAL SOLUTIONS LLC, 6567 SOLUTION CENTER, CHICAGO, IL 60677            | COMMUNICATIONS MANAGEMENT (MEDIA)         | 2,968,608           |

**2** Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization 190

**Part VIII Statement of Revenue**

Check if Schedule O contains a response or note to any line in this Part VIII

|  |  |   | (A)<br>Total revenue                                   | (B)<br>Related or exempt<br>function revenue              | (C)<br>Unrelated<br>business revenue | (D)<br>Revenue excluded<br>from tax under<br>sections 512-514 |            |  |
|--|--|---|--|---|--------------------------------------|---|------------|--|
| <b>Contributions, Gifts, Grants,<br/>and Other Similar Amounts</b> | <b>1a</b>  | Federated campaigns . . . . .   | <b>1a</b> 0  |   |                                      |   |            |  |
|  | <b>b</b>   | Membership dues . . . . .   | <b>1b</b> 0  |   |                                      |   |            |  |
|  | <b>c</b>   | Fundraising events . . . . .  | <b>1c</b> 0  |   |                                      |   |            |  |
|  | <b>d</b>   | Related organizations . . . . .   | <b>1d</b> 2,707,472                                    |   |                                      |   |            |  |
|  | <b>e</b>   | Government grants (contributions)   | <b>1e</b> 0  |   |                                      |   |            |  |
|  | <b>f</b>   | All other contributions, gifts, grants,<br>and similar amounts not included above   | <b>1f</b> 122,530                                      |   |                                      |   |            |  |
|  | <b>g</b>   | Noncash contributions included in<br>lines 1a-1f . . . . .  | <b>1g</b> \$ 30,128                                    |   |                                      |   |            |  |
|  | <b>h</b>   | <b>Total.</b> Add lines 1a-1f . . . . .   |  | 2,830,002   |                                      |   |            |  |
|  | <b>Program Service<br/>Revenue</b>                                     |   |  | Business Code   |                                      |   |            |  |
| <b>2a</b>  |  | PERIODICALS   | 900099   | 239,872,575   | 239,872,575                          | 0   |            |  |
| <b>b</b>   |  | CONFERENCE REVENUE  | 900099   | 189,378,768   | 189,378,768                          | 0   |            |  |
| <b>c</b>   |  | MEMBERSHIP DUES & PUBLIC IMPERATI   | 900099   | 47,631,048  | 47,631,048                           | 0   |            |  |
| <b>d</b>   |  | STANDARDS REVENUE   | 900099   | 43,351,063  | 43,351,063                           | 0   |            |  |
| <b>e</b>   |  | ADVERTISING REVENUE   | 541800   | 7,172,272   | 0                                    | 7,172,272   |            |  |
| <b>f</b>   |  | All other program service revenue . .   | 900099   | 18,431  | 18,431                               | 0   |            |  |
| <b>g</b>   |  | <b>Total.</b> Add lines 2a-2f . . . . .   |  | 527,424,157   |                                      |   |            |  |
| <b>Other Revenue</b>   | <b>3</b>   | Investment income (including dividends, interest, and<br>other similar amounts) . . . . .   |  | 20,375,699  | 0                                    | 0   | 20,375,699 |  |
|  | <b>4</b>   | Income from investment of tax-exempt bond proceeds  |  | 0   | 0                                    | 0   | 0          |  |
|  | <b>5</b>   | Royalties . . . . .   |  | 6,584,052   | 0                                    | 0   | 6,584,052  |  |
|  | <b>6a</b>  | Gross rents . . . . .   | (i) Real   | 0   |                                      |   |            |  |
|  |  |   | (ii) Personal  | 0   |                                      |   |            |  |
|  |  |   | <b>6b</b>  | Less: rental expenses                                     | 0                                    |   |            |  |
|  |  |   | <b>6c</b>  | Rental income or (loss)                                   | 0                                    |   |            |  |
|  | <b>d</b>   | Net rental income or (loss) . . . . .   |  | 0   | 0                                    | 0   | 0          |  |
|  | <b>7a</b>  | Gross amount from<br>sales of assets<br>other than inventory  | (i) Securities   | 692,226,060   |                                      |   |            |  |
|  |  |   | (ii) Other   | 0   |                                      |   |            |  |
|  |  |   | <b>7b</b>  | Less: cost or other basis<br>and sales expenses . . . . . | 688,720,745                          |   |            |  |
|  |  |   | <b>7c</b>  | Gain or (loss) . . . . .                                  | 3,505,315                            |   |            |  |
|  | <b>d</b>   | Net gain or (loss) . . . . .  |  | 3,505,315   | 0                                    | 0   | 3,505,315  |  |
|  | <b>8a</b>  | Gross income from fundraising<br>events (not including \$ 0<br>of contributions reported on line<br>1c). See Part IV, line 18 . . . . . | <b>8a</b> 0  |   |                                      |   |            |  |
|  | <b>b</b>   | Less: direct expenses . . . . .   | <b>8b</b> 0  |   |                                      |   |            |  |
| <b>c</b>   | Net income or (loss) from fundraising events . . . . .                 |   |  |   |                                      |   |            |  |
| <b>9a</b>  | Gross income from gaming<br>activities. See Part IV, line 19 . . . . . | <b>9a</b>   |  |   |                                      |   |            |  |
|  |  | <b>9b</b>   |  |   |                                      |   |            |  |
|  |  | <b>c</b>  | Net income or (loss) from gaming activities . . . . .  |   |                                      |   |            |  |
| <b>10a</b>   | Gross sales of inventory, less<br>returns and allowances . . . . .     | <b>10a</b>  |  |   |                                      |   |            |  |
|  |  | <b>b</b>  | Less: cost of goods sold . . . . .                     | <b>10b</b>  |                                      |   |            |  |
|  |  | <b>c</b>  | Net income or (loss) from sales of inventory . . . . . |   |                                      |   |            |  |
| <b>Miscellaneous<br/>Revenue</b>                                   |  |   | Business Code  |   |                                      |   |            |  |
|  | <b>11a</b>   | GAIN ON INSURANCE RECOVERIES  | 900099   | 1,879,910   |                                      | 1,879,910   |            |  |
|  | <b>b</b>   | INTERCOMPANY SERVICES & OTHER   | 541900   | 3,327,651   |                                      | 3,327,651   |            |  |
|  | <b>c</b>   | ENGINEERING CERTIFICATION PROGRAM   | 541900   | 499,383   |                                      | 499,383   |            |  |
|  | <b>d</b>   | All other revenue . . . . .   | 900099   | 4,289   | 4,289                                | 0   | 0          |  |
| <b>e</b>   | <b>Total.</b> Add lines 11a-11d . . . . .                              |   | 5,711,233  |   |                                      |   |            |  |
| <b>12</b>  | <b>Total revenue.</b> See instructions . . . . .                       |   | 566,430,458  | 520,256,174   | 10,999,306                           | 32,344,976  |            |  |

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

| <b>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</b> |   | (A)<br>Total expenses | (B)<br>Program service expenses | (C)<br>Management and general expenses | (D)<br>Fundraising expenses |
|---|---|-----------------------|---------------------------------|--|-----------------------------|
| <b>1</b>  | Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 . . . . .  | 4,119,710             | 4,119,710                       |  |                             |
| <b>2</b>  | Grants and other assistance to domestic individuals. See Part IV, line 22 . . . . .   | 866,721               | 866,721                         |  |                             |
| <b>3</b>  | Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 . . . . .  | 1,791,393             | 1,791,393                       |  |                             |
| <b>4</b>  | Benefits paid to or for members . . . . .   | 0                     | 0                               |  |                             |
| <b>5</b>  | Compensation of current officers, directors, trustees, and key employees . . . . .  | 5,051,966             | 3,851,526                       | 1,200,440                              | 0                           |
| <b>6</b>  | Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . . . .  | 88,356                | 88,356                          | 0                                      | 0                           |
| <b>7</b>  | Other salaries and wages . . . . .  | 139,731,210           | 137,097,876                     | 1,479,856                              | 1,153,478                   |
| <b>8</b>  | Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) . . . . .  | 15,769,033            | 15,609,352                      | 9,668                                  | 150,013                     |
| <b>9</b>  | Other employee benefits . . . . .   | 15,652,218            | 15,519,027                      | 0                                      | 133,191                     |
| <b>10</b>   | Payroll taxes . . . . .   | 8,172,828             | 7,387,884                       | 715,523                                | 69,421                      |
| <b>11</b>   | Fees for services (nonemployees):   |                       |                                 |  |                             |
| <b>a</b>  | Management . . . . .  | 0                     | 0                               | 0                                      | 0                           |
| <b>b</b>  | Legal . . . . .   | 1,189,311             | 1,138,602                       | 50,709                                 | 0                           |
| <b>c</b>  | Accounting . . . . .  | 1,073,520             | 0                               | 1,073,520                              | 0                           |
| <b>d</b>  | Lobbying . . . . .  | 0                     | 0                               | 0                                      | 0                           |
| <b>e</b>  | Professional fundraising services. See Part IV, line 17 . . . . .   | 0                     |                                 |  | 0                           |
| <b>f</b>  | Investment management fees . . . . .  | 1,721,300             | 0                               | 1,721,300                              | 0                           |
| <b>g</b>  | Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Schedule O.) . . . . .   | 54,119,573            | 53,586,269                      | 421,183                                | 112,121                     |
| <b>12</b>   | Advertising and promotion . . . . .   | 12,192,177            | 11,864,168                      | 297,549                                | 30,460                      |
| <b>13</b>   | Office expenses . . . . .   | 22,011,302            | 21,637,795                      | 316,499                                | 57,008                      |
| <b>14</b>   | Information technology . . . . .  | 22,709,321            | 21,987,065                      | 647,220                                | 75,036                      |
| <b>15</b>   | Royalties . . . . .   | 6,246,692             | 6,246,692                       | 0                                      | 0                           |
| <b>16</b>   | Occupancy . . . . .   | 6,019,306             | 2,377,584                       | 3,641,722                              | 0                           |
| <b>17</b>   | Travel . . . . .  | 27,641,609            | 27,126,692                      | 451,970                                | 62,947                      |
| <b>18</b>   | Payments of travel or entertainment expenses for any federal, state, or local public officials . . . . .  | 0                     | 0                               | 0                                      | 0                           |
| <b>19</b>   | Conferences, conventions, and meetings . . . . .  | 64,219,789            | 63,895,995                      | 318,427                                | 5,367                       |
| <b>20</b>   | Interest . . . . .  | 471,769               | 471,281                         | 488                                    | 0                           |
| <b>21</b>   | Payments to affiliates . . . . .  |                       |                                 |  |                             |
| <b>22</b>   | Depreciation, depletion, and amortization . . . . .   | 10,642,178            | 9,136,779                       | 1,505,399                              | 0                           |
| <b>23</b>   | Insurance . . . . .   | 1,850,376             | 1,685,176                       | 165,200                                | 0                           |
| <b>24</b>   | Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.) . . . . .   |                       |                                 |  |                             |
| <b>a</b>  | <u>COMMISSION EXPENSE</u> . . . . .   | 25,851,909            | 25,851,909                      | 0                                      | 0                           |
| <b>b</b>  | <u>PUBLICATION EXPENSE</u> . . . . .  | 17,122,848            | 17,079,524                      | 32,999                                 | 10,325                      |
| <b>c</b>  | <u>MEMBERS AND REGION EXPENSES</u> . . . . .  | 5,031,302             | 4,749,538                       | 272,375                                | 9,389                       |
| <b>d</b>  | <u>IEEE ALLOCATIONS &amp; SHARED COSTS</u> . . . . .  | 887,789               | 767,652                         | 14,834                                 | 105,303                     |
| <b>e</b>  | All other expenses . . . . .  | 0                     | 0                               | 0                                      | 0                           |
| <b>25</b>   | <b>Total functional expenses.</b> Add lines 1 through 24e . . . . .   | 472,245,506           | 455,934,566                     | 14,336,881                             | 1,974,059                   |
| <b>26</b>   | <b>Joint costs.</b> Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720) . . . . . |                       |                                 |  |                             |

**Part X Balance Sheet**

Check if Schedule O contains a response or note to any line in this Part X

|   |  | (A)                    |               | (B)                   |
|---|--|------------------------|---------------|-----------------------|
|   |  | Beginning of year      |               | End of year           |
| <b>Assets</b>   | <b>1</b> Cash—non-interest-bearing . . . . .   | 11,696,739             | <b>1</b>      | 12,601,685            |
|   | <b>2</b> Savings and temporary cash investments . . . . .  | 214,015,500            | <b>2</b>      | 149,966,000           |
|   | <b>3</b> Pledges and grants receivable, net . . . . .  | 4,762                  | <b>3</b>      | 293,227               |
|   | <b>4</b> Accounts receivable, net . . . . .  | 40,872,911             | <b>4</b>      | 44,234,715            |
|   | <b>5</b> Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons . . . . . | 0                      | <b>5</b>      | 0                     |
|   | <b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) . . . . .   | 0                      | <b>6</b>      | 0                     |
|   | <b>7</b> Notes and loans receivable, net . . . . .   |                        | <b>7</b>      |                       |
|   | <b>8</b> Inventories for sale or use . . . . .   |                        | <b>8</b>      |                       |
|   | <b>9</b> Prepaid expenses and deferred charges . . . . .   | 10,907,265             | <b>9</b>      | 14,273,224            |
|   | <b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D . . . . .   | <b>10a</b> 123,023,235 |               |                       |
|   | <b>b</b> Less: accumulated depreciation . . . . .  | <b>10b</b> 95,459,557  | 34,936,581    | <b>10c</b> 27,563,678 |
|   | <b>11</b> Investments—publicly traded securities . . . . .   | 671,410,797            | <b>11</b>     | 702,828,578           |
|   | <b>12</b> Investments—other securities. See Part IV, line 11 . . . . .   | 178,794,108            | <b>12</b>     | 183,099,608           |
|   | <b>13</b> Investments—program-related. See Part IV, line 11 . . . . .  | 0                      | <b>13</b>     | 0                     |
|   | <b>14</b> Intangible assets . . . . .  |                        | <b>14</b>     |                       |
|   | <b>15</b> Other assets. See Part IV, line 11 . . . . .   | 914,496                | <b>15</b>     | 7,318,603             |
| <b>16 Total assets.</b> Add lines 1 through 15 (must equal line 33) . . . . . | 1,163,553,159  | <b>16</b>              | 1,142,179,318 |                       |
| <b>Liabilities</b>  | <b>17</b> Accounts payable and accrued expenses . . . . .  | 72,712,194             | <b>17</b>     | 79,553,737            |
|   | <b>18</b> Grants payable . . . . .   |                        | <b>18</b>     |                       |
|   | <b>19</b> Deferred revenue . . . . .   | 122,757,214            | <b>19</b>     | 128,816,688           |
|   | <b>20</b> Tax-exempt bond liabilities . . . . .  |                        | <b>20</b>     |                       |
|   | <b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D . . . . .  | 63,019,721             | <b>21</b>     | 54,106,412            |
|   | <b>22</b> Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons . . . . .     | 0                      | <b>22</b>     | 0                     |
|   | <b>23</b> Secured mortgages and notes payable to unrelated third parties . . . . .   |                        | <b>23</b>     |                       |
|   | <b>24</b> Unsecured notes and loans payable to unrelated third parties . . . . .   |                        | <b>24</b>     |                       |
|   | <b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17–24). Complete Part X of Schedule D . . . . .  | 0                      | <b>25</b>     | 0                     |
|   | <b>26 Total liabilities.</b> Add lines 17 through 25 . . . . .   | 258,489,129            | <b>26</b>     | 262,476,837           |
| <b>Net Assets or Fund Balances</b>  | <b>Organizations that follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 27, 28, 32, and 33.</b>  |                        |               |                       |
|   | <b>27</b> Net assets without donor restrictions . . . . .  | 902,966,830            | <b>27</b>     | 877,350,181           |
|   | <b>28</b> Net assets with donor restrictions . . . . .   | 2,097,200              | <b>28</b>     | 2,352,300             |
|   | <b>Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.</b>  |                        |               |                       |
|   | <b>29</b> Capital stock or trust principal, or current funds . . . . .   |                        | <b>29</b>     |                       |
|   | <b>30</b> Paid-in or capital surplus, or land, building, or equipment fund . . . . .   |                        | <b>30</b>     |                       |
|   | <b>31</b> Retained earnings, endowment, accumulated income, or other funds . . . . .   |                        | <b>31</b>     |                       |
|   | <b>32</b> Total net assets or fund balances . . . . .  | 905,064,030            | <b>32</b>     | 879,702,481           |
| <b>33</b> Total liabilities and net assets/fund balances . . . . .            | 1,163,553,159  | <b>33</b>              | 1,142,179,318 |                       |

**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response or note to any line in this Part XI

|           |  |           |               |
|-----------|--|-----------|---------------|
| <b>1</b>  | Total revenue (must equal Part VIII, column (A), line 12)  | <b>1</b>  | 566,430,458   |
| <b>2</b>  | Total expenses (must equal Part IX, column (A), line 25)   | <b>2</b>  | 472,245,506   |
| <b>3</b>  | Revenue less expenses. Subtract line 2 from line 1   | <b>3</b>  | 94,184,952    |
| <b>4</b>  | Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))                      | <b>4</b>  | 905,064,030   |
| <b>5</b>  | Net unrealized gains (losses) on investments   | <b>5</b>  | (124,307,451) |
| <b>6</b>  | Donated services and use of facilities   | <b>6</b>  |               |
| <b>7</b>  | Investment expenses  | <b>7</b>  |               |
| <b>8</b>  | Prior period adjustments   | <b>8</b>  |               |
| <b>9</b>  | Other changes in net assets or fund balances (explain on Schedule O)   | <b>9</b>  | 4,760,950     |
| <b>10</b> | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B)) | <b>10</b> | 879,702,481   |

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response or note to any line in this Part XII

|   | Yes                                 | No                                  |
|---|-------------------------------------|-------------------------------------|
| <b>1</b> Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____<br>If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.  |                                     |                                     |
| <b>2a</b> Were the organization's financial statements compiled or reviewed by an independent accountant?<br>If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:<br><input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis |                                     | <input checked="" type="checkbox"/> |
| <b>b</b> Were the organization's financial statements audited by an independent accountant?<br>If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:<br><input type="checkbox"/> Separate basis <input checked="" type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis                 | <input checked="" type="checkbox"/> |                                     |
| <b>c</b> If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?<br>If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.  | <input checked="" type="checkbox"/> |                                     |
| <b>3a</b> As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?   |                                     | <input checked="" type="checkbox"/> |
| <b>b</b> If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits.  |                                     |                                     |

**Part VII**

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** (continued)

| (A) Name and Title   | (B) Average hours per week<br>(list any hours for related organizations below dotted line) | (C) Position<br>(Check all that apply) |                       |         |              |                              |        | (D) Reportable compensation from the organization (W-2/1099-MISC) | (E) Reportable compensation from related organizations (W-2/1099-MISC) | (F) Estimated amount of other compensation from the organization and related organizations |
|--|--|--|-----------------------|---------|--------------|------------------------------|--------|---|--|--|
|  |  | Individual trustee or director         | Institutional trustee | Officer | Key employee | Highest compensated employee | Former |   |  |  |
| (25) GREG T. GDOWSKI<br>-----<br>DIRECTOR & DELEGATE, REGION 1           | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |
| (26) BARRY C. TILTON<br>-----<br>DIRECTOR & DELEGATE, REGION 2           | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |
| (27) THERESA A. BRUNASSO<br>-----<br>DIRECTOR & DELEGATE, REGION 3       | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |
| (28) JOHNSON A. ASUMADU<br>-----<br>DIRECTOR & DELEGATE, REGION 4        | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |
| (29) BOB G. BECNEL<br>-----<br>DIRECTOR & DELEGATE, REGION 5             | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |
| (30) TIMOTHY T. LEE<br>-----<br>DIRECTOR & DELEGATE, REGION 6            | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |
| (31) ROBERT L. ANDERSON<br>-----<br>DIRECTOR & DELEGATE, REGION 7        | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |
| (32) ANTONIO LUQUE<br>-----<br>DIRECTOR & DELEGATE, REGION 8             | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |
| (33) ENRIQUE A. TEJERA<br>-----<br>DIRECTOR & DELEGATE, REGION 9         | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |
| (34) DEEPAK MATHUR<br>-----<br>DIRECTOR & DELEGATE, REGION 10            | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |
| (35) FRANCO MALOBERTI<br>-----<br>DIRECTOR & DELEGATE, DIVISION I        | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |
| (36) RUTH A. DYER<br>-----<br>DIRECTOR & DELEGATE, DIVISION II           | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |
| (37) KHALED BEN LETAIEF<br>-----<br>DIRECTOR & DELEGATE, DIVISION III    | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |
| (38) MANFRED J. SCHINDLER<br>-----<br>DIRECTOR & DELEGATE, DIVISION IV   | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |
| (39) CECILIA METRA<br>-----<br>DIRECTOR & DELEGATE, DIVISION V           | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |
| (40) PAUL M. CUNNINGHAM<br>-----<br>DIRECTOR & DELEGATE, DIVISION VI     | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |
| (41) CLAUDIO CAÑIZARES<br>-----<br>DIRECTOR & DELEGATE, DIVISION VII     | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |
| (42) CHRISTINA M. SCHOBER<br>-----<br>DIRECTOR & DELEGATE, DIVISION VIII | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              |        | 0   | 0  | 0  |

| (A) Name and Title   | (B) Average hours per week<br>(list any hours for related organizations below dotted line) | (C) Position<br>(Check all that apply) |                       |         |              |                              | (D) Reportable compensation from the organization<br>(W-2/1099-MISC) | (E) Reportable compensation from related organizations<br>(W-2/1099-MISC) | (F) Estimated amount of other compensation from the organization and related organizations |
|--|--|--|-----------------------|---------|--------------|------------------------------|--|---|--|
|  |  | Individual trustee or director         | Institutional trustee | Officer | Key employee | Highest compensated employee |  |   |  |
| (43) ALI H. SAYED<br>-----<br>DIRECTOR & DELEGATE, DIVISION IX | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              | 0  | 0   | 0  |
| (44) DALMA NOVAK<br>-----<br>DIRECTOR & DELEGATE, DIVISION X   | 5.0<br>-----<br>0.0  | ✓                                      |                       |         |              |                              | 0  | 0   | 0  |

**SCHEDULE A  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.  
Attach to Form 990 or Form 990-EZ.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2022**

**Open to Public  
Inspection**

|  |   |
|--|---|
| Name of the organization<br><b>INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS, INC.</b> | Employer identification number<br><b>13-1656633</b> |
|--|---|

**Part I Reason for Public Charity Status.** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1  A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2  A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990).)
- 3  A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4  A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state:
- 5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6  A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8  A community trust described in **section 170(b)(1)(A)(vii)**. (Complete Part II.)
- 9  An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university:
- 10  An organization that normally receives (1) more than 33<sup>1</sup>/<sub>3</sub>% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33<sup>1</sup>/<sub>3</sub>% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 11  An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 12  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
  - a  **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
  - b  **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
  - c  **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
  - d  **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
  - e  Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
- f Enter the number of supported organizations
- g Provide the following information about the supported organization(s).

| (i) Name of supported organization | (ii) EIN | (iii) Type of organization (described on lines 1-10 above (see instructions)) | (iv) Is the organization listed in your governing document? |    | (v) Amount of monetary support (see instructions) | (vi) Amount of other support (see instructions) |
|------------------------------------|----------|---|---|----|---|---|
|                                    |          |   | Yes   | No |   |   |
| (A)                                |          |   |   |    |   |   |
| (B)                                |          |   |   |    |   |   |
| (C)                                |          |   |   |    |   |   |
| (D)                                |          |   |   |    |   |   |
| (E)                                |          |   |   |    |   |   |
| <b>Total</b>                       |          |   |   |    |   |   |

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Cat. No. 11285F

Schedule A (Form 990) 2022



**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

| Calendar year (or fiscal year beginning in)  | (a) 2018 | (b) 2019 | (c) 2020 | (d) 2021 | (e) 2022 | (f) Total |
|--|----------|----------|----------|----------|----------|-----------|
| <b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") . . . . .  |          |          |          |          |          |           |
| <b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .   |          |          |          |          |          |           |
| <b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .   |          |          |          |          |          |           |
| <b>4 Total.</b> Add lines 1 through 3 . . . . .  |          |          |          |          |          |           |
| <b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) . . . . . |          |          |          |          |          |           |
| <b>6 Public support.</b> Subtract line 5 from line 4   |          |          |          |          |          |           |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in)   | (a) 2018 | (b) 2019 | (c) 2020 | (d) 2021 | (e) 2022  | (f) Total                |
|---|----------|----------|----------|----------|-----------|--------------------------|
| <b>7</b> Amounts from line 4 . . . . .  |          |          |          |          |           |                          |
| <b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources . . . . .  |          |          |          |          |           |                          |
| <b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on . . . . .   |          |          |          |          |           |                          |
| <b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . . . . .   |          |          |          |          |           |                          |
| <b>11 Total support.</b> Add lines 7 through 10   |          |          |          |          |           |                          |
| <b>12</b> Gross receipts from related activities, etc. (see instructions) . . . . .   |          |          |          |          | <b>12</b> |                          |
| <b>13 First 5 years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> . . . . . |          |          |          |          |           | <input type="checkbox"/> |

**Section C. Computation of Public Support Percentage**

|   |           |                          |
|---|-----------|--------------------------|
| <b>14</b> Public support percentage for 2022 (line 6, column (f), divided by line 11, column (f)) . . . . .   | <b>14</b> | %                        |
| <b>15</b> Public support percentage from 2021 Schedule A, Part II, line 14 . . . . .  | <b>15</b> | %                        |
| <b>16a 33 1/3% support test—2022.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization . . . . .   |           | <input type="checkbox"/> |
| <b>b 33 1/3% support test—2021.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization . . . . .  |           | <input type="checkbox"/> |
| <b>17a 10%-facts-and-circumstances test—2022.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here</b> . Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization . . . . .    |           | <input type="checkbox"/> |
| <b>b 10%-facts-and-circumstances test—2021.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here</b> . Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization . . . . . |           | <input type="checkbox"/> |
| <b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . . .  |           | <input type="checkbox"/> |

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

| Calendar year (or fiscal year beginning in)   | (a) 2018    | (b) 2019    | (c) 2020    | (d) 2021    | (e) 2022    | (f) Total     |
|---|-------------|-------------|-------------|-------------|-------------|---------------|
| <b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")   | 4,112,115   | 3,077,248   | 1,941,201   | 1,747,229   | 2,830,002   | 13,707,795    |
| <b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose . . . . | 478,572,318 | 506,395,954 | 427,464,063 | 443,118,549 | 520,256,174 | 2,375,807,058 |
| <b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513   |             |             |             |             |             | 0             |
| <b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .  |             |             |             |             |             | 0             |
| <b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .  |             |             |             |             |             | 0             |
| <b>6 Total.</b> Add lines 1 through 5 . . . . .   | 482,684,433 | 509,473,202 | 429,405,264 | 444,865,778 | 523,086,176 | 2,389,514,853 |
| <b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons . . . . .  | 0           | 0           | 0           | 0           | 0           | 0             |
| <b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year                   | 66,855,103  | 66,236,030  | 64,148,435  | 79,588,742  | 96,281,505  | 373,109,815   |
| <b>c</b> Add lines 7a and 7b . . . . .  | 66,855,103  | 66,236,030  | 64,148,435  | 79,588,742  | 96,281,505  | 373,109,815   |
| <b>8 Public support.</b> (Subtract line 7c from line 6.) . . . . .  |             |             |             |             |             | 2,016,405,038 |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in)  | (a) 2018    | (b) 2019    | (c) 2020    | (d) 2021    | (e) 2022    | (f) Total     |
|--|-------------|-------------|-------------|-------------|-------------|---------------|
| <b>9</b> Amounts from line 6 . . . . .   | 482,684,433 | 509,473,202 | 429,405,264 | 444,865,778 | 523,086,176 | 2,389,514,853 |
| <b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources . . . . .   | 27,004,872  | 28,460,237  | 26,664,112  | 30,291,393  | 28,839,661  | 141,260,275   |
| <b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 . . . . .   |             |             |             |             |             | 0             |
| <b>c</b> Add lines 10a and 10b . . . . .   | 27,004,872  | 28,460,237  | 26,664,112  | 30,291,393  | 28,839,661  | 141,260,275   |
| <b>11</b> Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on  |             |             |             |             |             | 0             |
| <b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . . . . .  | 0           | 0           | 0           | 0           | 0           | 0             |
| <b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.) . . . . .   | 509,689,305 | 537,933,439 | 456,069,376 | 475,157,171 | 551,925,837 | 2,530,775,128 |
| <b>14 First 5 years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> . . . . . <input type="checkbox"/> |             |             |             |             |             |               |

**Section C. Computation of Public Support Percentage**

|   |           |         |
|---|-----------|---------|
| <b>15</b> Public support percentage for 2022 (line 8, column (f), divided by line 13, column (f)) . . . . . | <b>15</b> | 79.68 % |
| <b>16</b> Public support percentage from 2021 Schedule A, Part III, line 15 . . . . .                       | <b>16</b> | 80.59 % |

**Section D. Computation of Investment Income Percentage**

|  |                                     |        |
|--|-------------------------------------|--------|
| <b>17</b> Investment income percentage for <b>2022</b> (line 10c, column (f), divided by line 13, column (f)) . . . . .  | <b>17</b>                           | 6.00 % |
| <b>18</b> Investment income percentage from <b>2021</b> Schedule A, Part III, line 17 . . . . .  | <b>18</b>                           | 5.58 % |
| <b>19a 33 1/3% support tests—2022.</b> If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization . . . . .         | <input checked="" type="checkbox"/> |        |
| <b>b 33 1/3% support tests—2021.</b> If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization . . . . . | <input type="checkbox"/>            |        |
| <b>20 Private foundation.</b> If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions . . . . .   | <input type="checkbox"/>            |        |

**Part IV Supporting Organizations**

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

|     |  | Yes | No |
|-----|--|-----|----|
| 1   | Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>   |     |    |
| 2   | Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>  |     |    |
| 3a  | Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>   |     |    |
| 3b  | Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>  |     |    |
| 3c  | Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>   |     |    |
| 4a  | Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>  |     |    |
| 4b  | Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>   |     |    |
| 4c  | Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>  |     |    |
| 5a  | Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i> |     |    |
| 5b  | <b>Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?   |     |    |
| 5c  | <b>Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?  |     |    |
| 6   | Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>   |     |    |
| 7   | Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>   |     |    |
| 8   | Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>   |     |    |
| 9a  | Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>   |     |    |
| 9b  | Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>   |     |    |
| 9c  | Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>  |     |    |
| 10a | Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>   |     |    |
| 10b | Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>  |     |    |

**Part IV Supporting Organizations** (continued)

|  | Yes | No |
|--|-----|----|
| <b>11</b> Has the organization accepted a gift or contribution from any of the following persons?  |     |    |
| <b>a</b> A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization? |     |    |
| <b>b</b> A family member of a person described on line 11a above?  |     |    |
| <b>c</b> A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide detail in <b>Part VI</b> .                             |     |    |

**Section B. Type I Supporting Organizations**

|   | Yes | No |
|---|-----|----|
| <b>1</b> Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? If "No," describe in <b>Part VI</b> how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year. |     |    |
| <b>2</b> Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in <b>Part VI</b> how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.   |     |    |

**Section C. Type II Supporting Organizations**

|  | Yes | No |
|--|-----|----|
| <b>1</b> Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in <b>Part VI</b> how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s). |     |    |

**Section D. All Type III Supporting Organizations**

|   | Yes | No |
|---|-----|----|
| <b>1</b> Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided? |     |    |
| <b>2</b> Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in <b>Part VI</b> how the organization maintained a close and continuous working relationship with the supported organization(s).   |     |    |
| <b>3</b> By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in <b>Part VI</b> the role the organization's supported organizations played in this regard.  |     |    |

**Section E. Type III Functionally Integrated Supporting Organizations**

|   |  |  |
|---|--|--|
| <b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).  |  |  |
| <b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. Complete <b>line 2</b> below.   |  |  |
| <b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete <b>line 3</b> below.  |  |  |
| <b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in <b>Part VI</b> how you supported a governmental entity (see instructions).  |  |  |
| <b>2</b> Activities Test. Answer lines 2a and 2b below.   |  |  |
| <b>a</b> Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in <b>Part VI</b> identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities. |  |  |
| <b>b</b> Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in <b>Part VI</b> the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.  |  |  |
| <b>3</b> Parent of Supported Organizations. Answer lines 3a and 3b below.   |  |  |
| <b>a</b> Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No," provide details in <b>Part VI</b> .   |  |  |
| <b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in <b>Part VI</b> the role played by the organization in this regard.   |  |  |

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

- 1**  Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in Part VI*). **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

| <b>Section A—Adjusted Net Income</b>  |  | (A) Prior Year | (B) Current Year (optional) |
|---------------------------------------|--|----------------|-----------------------------|
| <b>1</b>                              | Net short-term capital gain  | <b>1</b>       |                             |
| <b>2</b>                              | Recoveries of prior-year distributions   | <b>2</b>       |                             |
| <b>3</b>                              | Other gross income (see instructions)  | <b>3</b>       |                             |
| <b>4</b>                              | Add lines 1 through 3.   | <b>4</b>       |                             |
| <b>5</b>                              | Depreciation and depletion   | <b>5</b>       |                             |
| <b>6</b>                              | Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions) | <b>6</b>       |                             |
| <b>7</b>                              | Other expenses (see instructions)  | <b>7</b>       |                             |
| <b>8</b>                              | <b>Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4)  | <b>8</b>       |                             |
| <b>Section B—Minimum Asset Amount</b> |  | (A) Prior Year | (B) Current Year (optional) |
| <b>1</b>                              | Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):  |                |                             |
| <b>a</b>                              | Average monthly value of securities  | <b>1a</b>      |                             |
| <b>b</b>                              | Average monthly cash balances  | <b>1b</b>      |                             |
| <b>c</b>                              | Fair market value of other non-exempt-use assets   | <b>1c</b>      |                             |
| <b>d</b>                              | <b>Total</b> (add lines 1a, 1b, and 1c)  | <b>1d</b>      |                             |
| <b>e</b>                              | <b>Discount</b> claimed for blockage or other factors ( <i>explain in detail in Part VI</i> ):   |                |                             |
| <b>2</b>                              | Acquisition indebtedness applicable to non-exempt-use assets   | <b>2</b>       |                             |
| <b>3</b>                              | Subtract line 2 from line 1d.  | <b>3</b>       |                             |
| <b>4</b>                              | Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).   | <b>4</b>       |                             |
| <b>5</b>                              | Net value of non-exempt-use assets (subtract line 4 from line 3)   | <b>5</b>       |                             |
| <b>6</b>                              | Multiply line 5 by 0.035.  | <b>6</b>       |                             |
| <b>7</b>                              | Recoveries of prior-year distributions   | <b>7</b>       |                             |
| <b>8</b>                              | <b>Minimum Asset Amount</b> (add line 7 to line 6)   | <b>8</b>       |                             |
| <b>Section C—Distributable Amount</b> |  |                | Current Year                |
| <b>1</b>                              | Adjusted net income for prior year (from Section A, line 8, column A)  | <b>1</b>       |                             |
| <b>2</b>                              | Enter 0.85 of line 1.  | <b>2</b>       |                             |
| <b>3</b>                              | Minimum asset amount for prior year (from Section B, line 8, column A)   | <b>3</b>       |                             |
| <b>4</b>                              | Enter greater of line 2 or line 3.   | <b>4</b>       |                             |
| <b>5</b>                              | Income tax imposed in prior year   | <b>5</b>       |                             |
| <b>6</b>                              | <b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).  | <b>6</b>       |                             |
| <b>7</b>                              | <input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).                                |                |                             |

Schedule A (Form 990) 2022

**Part V** Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

| Section D—Distributions |  | Current Year |
|-------------------------|--|--------------|
| <b>1</b>                | Amounts paid to supported organizations to accomplish exempt purposes  | <b>1</b>     |
| <b>2</b>                | Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity              | <b>2</b>     |
| <b>3</b>                | Administrative expenses paid to accomplish exempt purposes of supported organizations  | <b>3</b>     |
| <b>4</b>                | Amounts paid to acquire exempt-use assets  | <b>4</b>     |
| <b>5</b>                | Qualified set-aside amounts (prior IRS approval required—provide details in <b>Part VI</b> )   | <b>5</b>     |
| <b>6</b>                | Other distributions (describe in <b>Part VI</b> ). See instructions.   | <b>6</b>     |
| <b>7</b>                | <b>Total annual distributions.</b> Add lines 1 through 6.  | <b>7</b>     |
| <b>8</b>                | Distributions to attentive supported organizations to which the organization is responsive (provide details in <b>Part VI</b> ). See instructions. | <b>8</b>     |
| <b>9</b>                | Distributable amount for 2022 from Section C, line 6   | <b>9</b>     |
| <b>10</b>               | Line 8 amount divided by line 9 amount   | <b>10</b>    |

| Section E—Distribution Allocations (see instructions)  | (i)<br>Excess Distributions | (ii)<br>Underdistributions<br>Pre-2022 | (iii)<br>Distributable<br>Amount for 2022 |
|--|-----------------------------|--|---|
| <b>1</b> Distributable amount for 2022 from Section C, line 6  |                             |  |   |
| <b>2</b> Underdistributions, if any, for years prior to 2022 (reasonable cause required—explain in <b>Part VI</b> ). See instructions.   |                             |  |   |
| <b>3</b> Excess distributions carryover, if any, to 2022   |                             |  |   |
| <b>a</b> From 2017 . . . . .   |                             |  |   |
| <b>b</b> From 2018 . . . . .   |                             |  |   |
| <b>c</b> From 2019 . . . . .   |                             |  |   |
| <b>d</b> From 2020 . . . . .   |                             |  |   |
| <b>e</b> From 2021 . . . . .   |                             |  |   |
| <b>f</b> <b>Total</b> of lines 3a through 3e   |                             |  |   |
| <b>g</b> Applied to underdistributions of prior years  |                             |  |   |
| <b>h</b> Applied to 2022 distributable amount  |                             |  |   |
| <b>i</b> Carryover from 2017 not applied (see instructions)  |                             |  |   |
| <b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from line 3f.  |                             |  |   |
| <b>4</b> Distributions for 2022 from Section D, line 7: \$   |                             |  |   |
| <b>a</b> Applied to underdistributions of prior years  |                             |  |   |
| <b>b</b> Applied to 2022 distributable amount  |                             |  |   |
| <b>c</b> Remainder. Subtract lines 4a and 4b from line 4.  |                             |  |   |
| <b>5</b> Remaining underdistributions for years prior to 2022, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in <b>Part VI</b> . See instructions. |                             |  |   |
| <b>6</b> Remaining underdistributions for 2022. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in <b>Part VI</b> . See instructions.                        |                             |  |   |
| <b>7</b> <b>Excess distributions carryover to 2023.</b> Add lines 3j and 4c.   |                             |  |   |
| <b>8</b> Breakdown of line 7:  |                             |  |   |
| <b>a</b> Excess from 2018 . . . . .  |                             |  |   |
| <b>b</b> Excess from 2019 . . . . .  |                             |  |   |
| <b>c</b> Excess from 2020 . . . . .  |                             |  |   |
| <b>d</b> Excess from 2021 . . . . .  |                             |  |   |
| <b>e</b> Excess from 2022 . . . . .  |                             |  |   |



**SCHEDULE C  
(Form 990)**

**Political Campaign and Lobbying Activities**

OMB No. 1545-0047

**2022**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

**For Organizations Exempt From Income Tax Under section 501(c) and section 527**  
**Complete if the organization is described below. Attach to Form 990 or Form 990-EZ.**  
**Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**

**If the organization answered "Yes," on Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then**

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

**If the organization answered "Yes," on Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then**

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

**If the organization answered "Yes," on Form 990, Part IV, line 5 (Proxy Tax) (See separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (See separate instructions), then**

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

|  |   |
|--|---|
| Name of organization<br><b>INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS, INC.</b> | Employer identification number<br><b>13-1656633</b> |
|--|---|

**Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.**

- 1 Provide a description of the organization's direct and indirect political campaign activities in Part IV. See instructions for definition of "political campaign activities."
- 2 Political campaign activity expenditures. See instructions . . . . . \$ \_\_\_\_\_
- 3 Volunteer hours for political campaign activities. See instructions . . . . . \_\_\_\_\_

**Part I-B Complete if the organization is exempt under section 501(c)(3).**

- 1 Enter the amount of any excise tax incurred by the organization under section 4955 . . . . . \$ \_\_\_\_\_
- 2 Enter the amount of any excise tax incurred by organization managers under section 4955 . . . . . \$ \_\_\_\_\_
- 3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? . . . . .  Yes  No
- 4a Was a correction made? . . . . .  Yes  No
- b If "Yes," describe in Part IV.

**Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).**

- 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities . . . . . \$ \_\_\_\_\_
- 2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities . . . . . \$ \_\_\_\_\_
- 3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b . . . . . \$ \_\_\_\_\_
- 4 Did the filing organization file **Form 1120-POL** for this year? . . . . .  Yes  No
- 5 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

| (a) Name | (b) Address | (c) EIN | (d) Amount paid from filing organization's funds. If none, enter -0-. | (e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-. |
|----------|-------------|---------|---|--|
| (1)      |             |         |   |  |
| (2)      |             |         |   |  |
| (3)      |             |         |   |  |
| (4)      |             |         |   |  |
| (5)      |             |         |   |  |
| (6)      |             |         |   |  |



**Part II-A Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).**

- A** Check  if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).
- B** Check  if the filing organization checked box A and "limited control" provisions apply.

| <b>Limits on Lobbying Expenditures</b><br>(The term "expenditures" means amounts paid or incurred.)  |   | (a) Filing organization's totals                | (b) Affiliated group totals                              |                    |                               |   |  |   |  |  |   |                   |              |  |  |
|--|---|---|--|--------------------|-------------------------------|---|--|---|--|--|---|-------------------|--------------|--|--|
| <b>1a</b>  | Total lobbying expenditures to influence public opinion (grassroots lobbying)   |   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>b</b>   | Total lobbying expenditures to influence a legislative body (direct lobbying)   | 104,900   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>c</b>   | Total lobbying expenditures (add lines 1a and 1b)   | 104,900   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>d</b>   | Other exempt purpose expenditures   | 464,331,374                                     |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>e</b>   | Total exempt purpose expenditures (add lines 1c and 1d)   | 464,436,274                                     |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>f</b>   | Lobbying nontaxable amount. Enter the amount from the following table in both columns.  | 1,000,000                                       |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <table border="1" style="width: 100%;"> <thead> <tr> <th style="width: 50%;">If the amount on line 1e, column (a) or (b) is:</th> <th style="width: 50%;">The lobbying nontaxable amount is:</th> </tr> </thead> <tbody> <tr> <td>Not over \$500,000</td> <td>20% of the amount on line 1e.</td> </tr> <tr> <td>Over \$500,000 but not over \$1,000,000</td> <td>\$100,000 plus 15% of the excess over \$500,000.</td> </tr> <tr> <td>Over \$1,000,000 but not over \$1,500,000</td> <td>\$175,000 plus 10% of the excess over \$1,000,000.</td> </tr> <tr> <td>Over \$1,500,000 but not over \$17,000,000</td> <td>\$225,000 plus 5% of the excess over \$1,500,000.</td> </tr> <tr> <td>Over \$17,000,000</td> <td>\$1,000,000.</td> </tr> </tbody> </table> |   | If the amount on line 1e, column (a) or (b) is: | The lobbying nontaxable amount is:                       | Not over \$500,000 | 20% of the amount on line 1e. | Over \$500,000 but not over \$1,000,000 | \$100,000 plus 15% of the excess over \$500,000. | Over \$1,000,000 but not over \$1,500,000 | \$175,000 plus 10% of the excess over \$1,000,000. | Over \$1,500,000 but not over \$17,000,000 | \$225,000 plus 5% of the excess over \$1,500,000. | Over \$17,000,000 | \$1,000,000. |  |  |
| If the amount on line 1e, column (a) or (b) is:  | The lobbying nontaxable amount is:  |   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| Not over \$500,000   | 20% of the amount on line 1e.   |   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| Over \$500,000 but not over \$1,000,000  | \$100,000 plus 15% of the excess over \$500,000.  |   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| Over \$1,000,000 but not over \$1,500,000  | \$175,000 plus 10% of the excess over \$1,000,000.  |   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| Over \$1,500,000 but not over \$17,000,000   | \$225,000 plus 5% of the excess over \$1,500,000.   |   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| Over \$17,000,000  | \$1,000,000.  |   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>g</b>   | Grassroots nontaxable amount (enter 25% of line 1f)   | 250,000   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>h</b>   | Subtract line 1g from line 1a. If zero or less, enter -0-   | 0   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>i</b>   | Subtract line 1f from line 1c. If zero or less, enter -0-   | 0   |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>j</b>   | If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? |   | <input type="checkbox"/> Yes <input type="checkbox"/> No |                    |                               |   |  |   |  |  |   |                   |              |  |  |

**4-Year Averaging Period Under Section 501(h)**  
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the separate instructions for lines 2a through 2f.)

| <b>Lobbying Expenditures During 4-Year Averaging Period</b>      |           |           |           |           |           |
|--|-----------|-----------|-----------|-----------|-----------|
| Calendar year (or fiscal year beginning in)                      | (a) 2019  | (b) 2020  | (c) 2021  | (d) 2022  | (e) Total |
| <b>2a</b> Lobbying nontaxable amount                             | 1,000,000 | 1,000,000 | 1,000,000 | 1,000,000 | 4,000,000 |
| <b>b</b> Lobbying ceiling amount (150% of line 2a, column (e))   |           |           |           |           | 6,000,000 |
| <b>c</b> Total lobbying expenditures                             | 119,812   | 144,769   | 155,521   | 104,900   | 525,002   |
| <b>d</b> Grassroots nontaxable amount                            | 250,000   | 250,000   | 250,000   | 250,000   | 1,000,000 |
| <b>e</b> Grassroots ceiling amount (150% of line 2d, column (e)) |           |           |           |           | 1,500,000 |
| <b>f</b> Grassroots lobbying expenditures                        | 0         | 0         | 0         |           | 0         |

**Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).**

For each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.

|   | (a) |    | (b)    |
|---|-----|----|--------|
|   | Yes | No | Amount |
| <b>1</b> During the year, did the filing organization attempt to influence foreign, national, state, or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of: |     |    |        |
| <b>a</b> Volunteers?  |     |    |        |
| <b>b</b> Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?   |     |    |        |
| <b>c</b> Media advertisements?  |     |    |        |
| <b>d</b> Mailings to members, legislators, or the public?   |     |    |        |
| <b>e</b> Publications, or published or broadcast statements?  |     |    |        |
| <b>f</b> Grants to other organizations for lobbying purposes?   |     |    |        |
| <b>g</b> Direct contact with legislators, their staffs, government officials, or a legislative body?  |     |    |        |
| <b>h</b> Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?  |     |    |        |
| <b>i</b> Other activities?  |     |    |        |
| <b>j</b> Total. Add lines 1c through 1i   |     |    |        |
| <b>2a</b> Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?   |     |    |        |
| <b>b</b> If "Yes," enter the amount of any tax incurred under section 4912  |     |    |        |
| <b>c</b> If "Yes," enter the amount of any tax incurred by organization managers under section 4912   |     |    |        |
| <b>d</b> If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?   |     |    |        |

**Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).**

|  | Yes      | No |
|--|----------|----|
| <b>1</b> Were substantially all (90% or more) dues received nondeductible by members?  | <b>1</b> |    |
| <b>2</b> Did the organization make only in-house lobbying expenditures of \$2,000 or less?                                   | <b>2</b> |    |
| <b>3</b> Did the organization agree to carry over lobbying and political campaign activity expenditures from the prior year? | <b>3</b> |    |

**Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No" OR (b) Part III-A, line 3, is answered "Yes."**

|  |           |  |
|--|-----------|--|
| <b>1</b> Dues, assessments and similar amounts from members  | <b>1</b>  |  |
| <b>2</b> Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).  |           |  |
| <b>a</b> Current year  | <b>2a</b> |  |
| <b>b</b> Carryover from last year  | <b>2b</b> |  |
| <b>c</b> Total   | <b>2c</b> |  |
| <b>3</b> Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues   | <b>3</b>  |  |
| <b>4</b> If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditures next year? | <b>4</b>  |  |
| <b>5</b> Taxable amount of lobbying and political expenditures. See instructions   | <b>5</b>  |  |

**Part IV Supplemental Information**

Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (See instructions); and Part II-B, line 1. Also, complete this part for any additional information.

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SCHEDULE D (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b. Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization: INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS, INC. Employer identification number: 13-1656633

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

Table with 3 columns: Line number, (a) Donor advised funds, (b) Funds and other accounts. Includes rows for total number, aggregate value, and donor/grantee notification questions.

Part II Conservation Easements. Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

Form for Conservation Easements including questions about purpose, monitoring, and expenses, with a sub-table for 'Held at the End of the Tax Year'.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

Form for Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets, including revenue and asset reporting questions.

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** *(continued)*

**3** Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply):

- a**  Public exhibition
- b**  Scholarly research
- c**  Preservation for future generations
- d**  Loan or exchange program
- e**  Other .....

**4** Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

**5** During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?  Yes  No

**Part IV Escrow and Custodial Arrangements.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

**1a** Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?  Yes  No

**b** If "Yes," explain the arrangement in Part XIII and complete the following table:

|   | Amount |
|---|--------|
| <b>1c</b> Beginning balance             |        |
| <b>1d</b> Additions during the year     |        |
| <b>1e</b> Distributions during the year |        |
| <b>1f</b> Ending balance                |        |

**2a** Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  Yes  No

**b** If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII

**Part V Endowment Funds.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

|   | (a) Current year | (b) Prior year | (c) Two years back | (d) Three years back | (e) Four years back |
|---|------------------|----------------|--------------------|----------------------|---------------------|
| <b>1a</b> Beginning of year balance                     | 56,225,155       | 47,484,897     | 41,972,506         | 35,849,206           | 36,419,485          |
| <b>b</b> Contributions                                  | 5,821,682        | 6,601,459      | 4,570,915          | 5,269,552            | 4,471,586           |
| <b>c</b> Net investment earnings, gains, and losses     | (4,659,129)      | 4,846,377      | 4,105,536          | 4,581,770            | (1,200,958)         |
| <b>d</b> Grants or scholarships                         | 3,564,279        | 2,282,407      | 2,667,342          | 3,204,319            | 3,245,952           |
| <b>e</b> Other expenditures for facilities and programs | 176,476          | 113,527        | 113,872            | 189,477              | 196,653             |
| <b>f</b> Administrative expenses                        | 311,110          | 311,644        | 382,846            | 334,226              | 398,302             |
| <b>g</b> End of year balance                            | 53,335,843       | 56,225,155     | 47,484,897         | 41,972,506           | 35,849,206          |

**2** Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

- a** Board designated or quasi-endowment 6.76 %
- b** Permanent endowment 0.25 %
- c** Term endowment 92.99 %

The percentages on lines 2a, 2b, and 2c should equal 100%.

**3a** Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

|   | Yes | No |
|---|-----|----|
| <b>(i)</b> Unrelated organizations  | ✓   |    |
| <b>(ii)</b> Related organizations   | ✓   |    |
| <b>b</b> If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? | ✓   |    |

**4** Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

| Description of property  | (a) Cost or other basis (investment) | (b) Cost or other basis (other) | (c) Accumulated depreciation | (d) Book value |
|--|--------------------------------------|---------------------------------|------------------------------|----------------|
| <b>1a</b> Land   |                                      | 836,354                         |                              | 836,354        |
| <b>b</b> Buildings   |                                      | 37,459,485                      | 30,529,718                   | 6,929,767      |
| <b>c</b> Leasehold improvements  |                                      | 1,269,381                       | 1,071,840                    | 197,541        |
| <b>d</b> Equipment   |                                      | 83,458,015                      | 63,857,999                   | 19,600,016     |
| <b>e</b> Other   |                                      |                                 |                              |                |
| <b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.) |                                      |                                 |                              | 27,563,678     |

**Part VII Investments—Other Securities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

| (a) Description of security or category<br>(including name of security)         | (b) Book value     | (c) Method of valuation:<br>Cost or end-of-year market value |
|---|--------------------|--|
| (1) Financial derivatives . . . . .   |                    |  |
| (2) Closely held equity interests . . . . .                                     |                    |  |
| (3) Other   |                    |  |
| (A) COMMINGLED FUNDS  | 130,762,400        |  |
| (B) INVESTMENTS IN SUBSIDIARIES   | 52,337,208         |  |
| (C)   |                    |  |
| (D)   |                    |  |
| (E)   |                    |  |
| (F)   |                    |  |
| (G)   |                    |  |
| (H)   |                    |  |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 12.) . . . | <b>183,099,608</b> |  |

**Part VIII Investments—Program Related.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

| (a) Description of investment   | (b) Book value | (c) Method of valuation:<br>Cost or end-of-year market value |
|---|----------------|--|
| (1)   |                |  |
| (2)   |                |  |
| (3)   |                |  |
| (4)   |                |  |
| (5)   |                |  |
| (6)   |                |  |
| (7)   |                |  |
| (8)   |                |  |
| (9)   |                |  |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 13.) . . . |                |  |

**Part IX Other Assets.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

| (a) Description   | (b) Book value |
|---|----------------|
| (1)   |                |
| (2)   |                |
| (3)   |                |
| (4)   |                |
| (5)   |                |
| (6)   |                |
| (7)   |                |
| (8)   |                |
| (9)   |                |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 15.) . . . . . |                |

**Part X Other Liabilities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

| 1. (a) Description of liability   | (b) Book value |
|---|----------------|
| (1) Federal income taxes  |                |
| (2)   |                |
| (3)   |                |
| (4)   |                |
| (5)   |                |
| (6)   |                |
| (7)   |                |
| (8)   |                |
| (9)   |                |
| <b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 25.) . . . . . | <b>0</b>       |

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

|          |   |           |               |
|----------|---|-----------|---------------|
| <b>1</b> | Total revenue, gains, and other support per audited financial statements . . . . .                              | <b>1</b>  | 446,140,957   |
| <b>2</b> | Amounts included on line 1 but not on Form 990, Part VIII, line 12:   |           |               |
| <b>a</b> | Net unrealized gains (losses) on investments . . . . .  | <b>2a</b> | (124,307,451) |
| <b>b</b> | Donated services and use of facilities . . . . .  | <b>2b</b> |               |
| <b>c</b> | Recoveries of prior year grants . . . . .   | <b>2c</b> |               |
| <b>d</b> | Other (Describe in Part XIII.) . . . . .  | <b>2d</b> | 5,739,250     |
| <b>e</b> | Add lines <b>2a</b> through <b>2d</b> . . . . .   | <b>2e</b> | (118,568,201) |
| <b>3</b> | Subtract line <b>2e</b> from line <b>1</b> . . . . .  | <b>3</b>  | 564,709,158   |
| <b>4</b> | Amounts included on Form 990, Part VIII, line 12, but not on line 1:  |           |               |
| <b>a</b> | Investment expenses not included on Form 990, Part VIII, line 7b . . . . .                                      | <b>4a</b> | 1,721,300     |
| <b>b</b> | Other (Describe in Part XIII.) . . . . .  | <b>4b</b> | 0             |
| <b>c</b> | Add lines <b>4a</b> and <b>4b</b> . . . . .   | <b>4c</b> | 1,721,300     |
| <b>5</b> | Total revenue. Add lines <b>3</b> and <b>4c</b> . <i>(This must equal Form 990, Part I, line 12.)</i> . . . . . | <b>5</b>  | 566,430,458   |

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

|          |  |           |             |
|----------|--|-----------|-------------|
| <b>1</b> | Total expenses and losses per audited financial statements . . . . .   | <b>1</b>  | 470,932,810 |
| <b>2</b> | Amounts included on line 1 but not on Form 990, Part IX, line 25:  |           |             |
| <b>a</b> | Donated services and use of facilities . . . . .   | <b>2a</b> |             |
| <b>b</b> | Prior year adjustments . . . . .   | <b>2b</b> |             |
| <b>c</b> | Other losses . . . . .   | <b>2c</b> |             |
| <b>d</b> | Other (Describe in Part XIII.) . . . . .   | <b>2d</b> | 408,604     |
| <b>e</b> | Add lines <b>2a</b> through <b>2d</b> . . . . .  | <b>2e</b> | 408,604     |
| <b>3</b> | Subtract line <b>2e</b> from line <b>1</b> . . . . .   | <b>3</b>  | 470,524,206 |
| <b>4</b> | Amounts included on Form 990, Part IX, line 25, but not on line 1:   |           |             |
| <b>a</b> | Investment expenses not included on Form 990, Part VIII, line 7b . . . . .                                       | <b>4a</b> | 1,721,300   |
| <b>b</b> | Other (Describe in Part XIII.) . . . . .   | <b>4b</b> | 0           |
| <b>c</b> | Add lines <b>4a</b> and <b>4b</b> . . . . .  | <b>4c</b> | 1,721,300   |
| <b>5</b> | Total expenses. Add lines <b>3</b> and <b>4c</b> . <i>(This must equal Form 990, Part I, line 18.)</i> . . . . . | <b>5</b>  | 472,245,506 |

**Part XIII Supplemental Information.**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

SEE STATEMENT

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**Part XIII**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

| Return Reference - Identifier  | Explanation  |           |
|--|--|-----------|
| SCHEDULE D, PART XI, LINE 2(D) - OTHER REVENUES IN AUDITED FINANCIAL STATEMENTS NOT IN FORM 990  | <b>(a) Description</b>                                   |           |
|  | <b>(b) Amount</b>  |           |
|  | CONSOLIDATED AFFILIATES NET ELIMINATIONS                 | 978,300   |
|  | UNREALIZED PENSION GAINS RECLASS FROM EXPENSE TO REVENUE | 4,760,950 |
| SCHEDULE D, PART XII, LINE 2(D) - OTHER EXPENSES IN AUDITED FINANCIAL STATEMENTS NOT IN FORM 990 | <b>(a) Description</b>                                   |           |
|  | <b>(b) Amount</b>  |           |
|  | CONSOLIDATED AFFILIATES NET ELIMINATIONS                 | 408,604   |

**Part XIII**

**Supplemental Information.** Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

| Return Reference - Identifier                                  | Explanation  |
|--|--|
| SCHEDULE D, PART IV, LINE 2B - EXPLANATION OF ESCROW AGREEMENT | THE INSTITUTE HELD \$54,106,400 ON BEHALF OF IEEE FOUNDATION, INCORPORATED.  |
| SCHEDULE D, PART V, LINE 4 - INTENDED USES OF ENDOWMENT FUNDS  | <p>THE INSTITUTE DOES NOT RECORD OR MAINTAIN ENDOWMENT OR QUASI-ENDOWMENT FUNDS. ANY ENDOWMENT ACTIVITY REPORTED ON SCHEDULE D, PART V OF THE INSTITUTE'S FORM 990 IS SOLELY RELATED TO FUNDS MAINTAINED BY THE IEEE FOUNDATION, AN ORGANIZATION RELATED TO, BUT NOT CONTROLLED BY, THE INSTITUTE. ENDOWMENT AND QUASI-ENDOWMENT FUNDS HELD BY THE IEEE FOUNDATION ARE USED TO SUPPORT VARIOUS PROGRAM INITIATIVES OF THE INSTITUTE.</p> <p>THE IEEE FOUNDATION MAINTAINS APPROXIMATELY 250 DONOR DESIGNATED FUNDS THAT SUPPORT A VARIETY OF EDUCATIONAL, HUMANITARIAN, HISTORICAL PRESERVATION, AND PEER RECOGNITION PROGRAMS OF THE INSTITUTE, AS WELL AS SUPPORTING NEW AND INNOVATIVE PROJECTS FURTHERING THE INSTITUTE'S MISSION TO FOSTER TECHNOLOGICAL INNOVATION AND EXCELLENCE FOR THE BENEFIT OF HUMANITY.</p>   |
| SCHEDULE D, PART X, LINE 2 - FIN 48 (ASC 740) FOOTNOTE         | <p>THE INSTITUTE IS QUALIFIED UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE ("CODE") AS AN ORGANIZATION EXEMPT FROM FEDERAL INCOME TAX AND APPLICABLE STATE INCOME TAX AND IS CLASSIFIED AS A PUBLICLY SUPPORTED CHARITABLE ORGANIZATION UNDER SECTION 509(A)(2) OF THE CODE. NEVERTHELESS, THE INSTITUTE IS SUBJECT TO TAX ON INCOME UNRELATED TO ITS EXEMPT PURPOSE, UNLESS THAT INCOME IS OTHERWISE EXCLUDED BY THE CODE.</p> <p>THE INSTITUTE FOLLOWS GUIDANCE THAT CLARIFIES THE ACCOUNTING FOR UNCERTAINTY IN TAX POSITIONS TAKEN OR EXPECTED TO BE TAKEN IN A TAX RETURN, INCLUDING ISSUES RELATING TO FINANCIAL STATEMENT RECOGNITION AND MEASUREMENT. THIS SECTION PROVIDES THAT THE TAX EFFECTS FROM AN UNCERTAIN TAX POSITION CAN BE RECOGNIZED IN THE FINANCIAL STATEMENTS ONLY IF THE POSITION IS "MORE-LIKELY-THAN-NOT" TO BE SUSTAINED IF THE POSITION WERE TO BE CHALLENGED BY A TAXING AUTHORITY. THE ASSESSMENT OF THE TAX POSITION IS BASED SOLELY ON THE TECHNICAL MERITS OF THE POSITION, WITHOUT REGARD TO THE LIKELIHOOD THAT THE TAX POSITION MAY BE CHALLENGED. AS OF DECEMBER 31, 2022, AND 2021, MANAGEMENT HAS DETERMINED THAT THERE ARE NO SIGNIFICANT UNCERTAIN TAX POSITIONS THAT WOULD REQUIRE RECOGNITION OR DISCLOSURE IN THE ACCOMPANYING CONSOLIDATED FINANCIAL STATEMENTS.</p> |



**SCHEDULE F  
(Form 990)**

**Statement of Activities Outside the United States**

OMB No. 1545-0047

**2022**

**Open to Public Inspection**

Complete if the organization answered "Yes" on Form 990, Part IV, line 14b, 15, or 16.

Attach to Form 990.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Department of the Treasury  
Internal Revenue Service

Name of the organization

INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS, INC.

Employer identification number

13-1656633

**Part I** **General Information on Activities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 14b.

**1 For grantmakers.** Does the organization maintain records to substantiate the amount of its grants and other assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  **Yes**  **No**

**2 For grantmakers.** Describe in Part V the organization's procedures for monitoring the use of its grants and other assistance outside the United States.

**3 Activities per Region.** (The following Part I, line 3 table can be duplicated if additional space is needed.)

| (a) Region  | (b) Number of offices in the region | (c) Number of employees, agents, and independent contractors in the region | (d) Activities conducted in the region (by type) (such as, fundraising, program services, investments, grants to recipients located in the region) | (e) If activity listed in (d) is a program service, describe specific type of service(s) in the region | (f) Total expenditures for and investments in the region |
|---|-------------------------------------|--|--|--|--|
| (1) CENTRAL AMERICA AND THE CARIBBEAN                       | 0                                   | 0  | PROGRAM SERVICES   | MEMBER SUPPORT   | 156,643  |
| (2) CENTRAL AMERICA AND THE CARIBBEAN                       | 0                                   | 0  | PROGRAM SERVICES   | CONFERENCES  | 185,532  |
| (3) CENTRAL AMERICA AND THE CARIBBEAN                       | 0                                   | 0  | PROGRAM SERVICES   | STANDARDS  | 242,262  |
| (4) CENTRAL AMERICA AND THE CARIBBEAN                       | 0                                   | 0  | GRANTMAKING  | NOT APPLICABLE   | 23,069   |
| (5) EAST ASIA AND THE PACIFIC                               | 1                                   | 23   | PROGRAM SERVICES   | MEMBER SUPPORT   | 1,334,631  |
| (6) EAST ASIA AND THE PACIFIC                               | 0                                   | 0  | PROGRAM SERVICES   | CONFERENCES  | 14,379,425   |
| (7) EAST ASIA AND THE PACIFIC                               | 0                                   | 0  | PROGRAM SERVICES   | STANDARDS  | 2,710,933  |
| (8) EAST ASIA AND THE PACIFIC                               | 0                                   | 0  | GRANTMAKING  | NOT APPLICABLE   | 552,900  |
| (9) EUROPE (INCLUDING ICELAND AND GREENLAND)                | 0                                   | 0  | PROGRAM SERVICES   | MEMBER SUPPORT   | 359,410  |
| (10) EUROPE (INCLUDING ICELAND AND GREENLAND)               | 0                                   | 0  | PROGRAM SERVICES   | CONFERENCES  | 14,343,808   |
| (11) EUROPE (INCLUDING ICELAND AND GREENLAND)               | 0                                   | 30   | PROGRAM SERVICES   | STANDARDS  | 588,648  |
| (12) EUROPE (INCLUDING ICELAND AND GREENLAND)               | 0                                   | 0  | GRANTMAKING  | NOT APPLICABLE   | 475,844  |
| (13) MIDDLE EAST AND NORTH AFRICA                           | 0                                   | 0  | PROGRAM SERVICES   | MEMBER SUPPORT   | 281,573  |
| (14) MIDDLE EAST AND NORTH AFRICA                           | 0                                   | 0  | PROGRAM SERVICES   | CONFERENCES  | 780,062  |
| (15) MIDDLE EAST AND NORTH AFRICA                           | 0                                   | 0  | PROGRAM SERVICES   | STANDARDS  | 2,042,481  |
| (16) MIDDLE EAST AND NORTH AFRICA                           | 0                                   | 0  | GRANTMAKING  | NOT APPLICABLE   | 71,540   |
| (17) (SEE STATEMENT)  |                                     |  |  |  |  |
| <b>3a</b> Subtotal . . . . .                                | 1                                   | 53   |  |  | 38,528,761   |
| <b>b</b> Total from continuation sheets to Part I . . . . . | 1                                   | 22   |  |  | 10,123,986   |
| <b>c Totals</b> (add lines 3a and 3b)                       | 2                                   | 75   |  |  | 48,652,747   |

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Cat. No. 50082W

Schedule F (Form 990) 2022

**Part II** **Grants and Other Assistance to Organizations or Entities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 15, for any recipient who received more than \$5,000. Part II can be duplicated if additional space is needed.

| <b>1</b> | <b>(a)</b> Name of organization | <b>(b)</b> IRS code section and EIN (if applicable) | <b>(c)</b> Region                        | <b>(d)</b> Purpose of grant   | <b>(e)</b> Amount of cash grant | <b>(f)</b> Manner of cash disbursement | <b>(g)</b> Amount of noncash assistance | <b>(h)</b> Description of noncash assistance | <b>(i)</b> Method of valuation (book, FMV, appraisal, other) |
|----------|---------------------------------|---|--|-------------------------------|---------------------------------|--|---|--|--|
| (1)      |                                 |   | NORTH AMERICA (CANADA & MEXICO ONLY)     | ENGINEERING DEVELOPMENT       | 22,093                          | CHECKS                                 | 0                                       | NOT APPLICABLE                               | NOT APPLICABLE   |
| (2)      |                                 |   | EAST ASIA AND THE PACIFIC                | ENGINEERING FELLOWSHIP        | 15,000                          | CHECKS                                 | 0                                       | NOT APPLICABLE                               | NOT APPLICABLE   |
| (3)      |                                 |   | CENTRAL AMERICA AND THE CARIBBEAN        | ENGINEERING DEVELOPMENT       | 12,500                          | CHECKS                                 | 0                                       | NOT APPLICABLE                               | NOT APPLICABLE   |
| (4)      |                                 |   | EUROPE (INCLUDING ICELAND AND GREENLAND) | ENGINEERING DEVELOPMENT       | 8,750                           | CHECKS                                 | 0                                       | NOT APPLICABLE                               | NOT APPLICABLE   |
| (5)      |                                 |   | EUROPE (INCLUDING ICELAND AND GREENLAND) | ENGINEERING DEVELOPMENT       | 8,750                           | CHECKS                                 | 0                                       | NOT APPLICABLE                               | NOT APPLICABLE   |
| (6)      |                                 |   | EUROPE (INCLUDING ICELAND AND GREENLAND) | ENGINEERING DEVELOPMENT       | 6,500                           | CHECKS                                 | 0                                       | NOT APPLICABLE                               | NOT APPLICABLE   |
| (7)      |                                 |   | SOUTH AMERICA                            | ENGINEERING ACHIEVEMENT AWARD | 10,000                          | CHECKS                                 | 0                                       | NOT APPLICABLE                               | NOT APPLICABLE   |
| (8)      |                                 |   | EUROPE (INCLUDING ICELAND AND GREENLAND) | ENGINEERING FELLOWSHIP        | 15,000                          | CHECKS                                 | 0                                       | NOT APPLICABLE                               | NOT APPLICABLE   |
| (9)      |                                 |   | EUROPE (INCLUDING ICELAND AND GREENLAND) | ENGINEERING DEVELOPMENT       | 23,000                          | CHECKS                                 | 0                                       | NOT APPLICABLE                               | NOT APPLICABLE   |
| (10)     |                                 |   | EAST ASIA AND THE PACIFIC                | ENGINEERING DEVELOPMENT       | 30,000                          | CHECKS                                 | 0                                       | NOT APPLICABLE                               | NOT APPLICABLE   |
| (11)     |                                 |   | EUROPE (INCLUDING ICELAND AND GREENLAND) | ENGINEERING DEVELOPMENT       | 6,300                           | CHECKS                                 | 0                                       | NOT APPLICABLE                               | NOT APPLICABLE   |
| (12)     |                                 |   | EAST ASIA AND THE PACIFIC                | ENGINEERING DEVELOPMENT       | 15,000                          | CHECKS                                 | 0                                       | NOT APPLICABLE                               | NOT APPLICABLE   |
| (13)     |                                 |   | SOUTH ASIA                               | ENGINEERING FELLOWSHIP        | 18,800                          | CHECKS                                 | 0                                       | NOT APPLICABLE                               | NOT APPLICABLE   |
| (14)     |                                 |   | EUROPE (INCLUDING ICELAND AND GREENLAND) | ENGINEERING DEVELOPMENT       | 20,000                          | CHECKS                                 | 0                                       | NOT APPLICABLE                               | NOT APPLICABLE   |
| (15)     |                                 |   | EUROPE (INCLUDING ICELAND AND GREENLAND) | ENGINEERING DEVELOPMENT       | 15,400                          | CHECKS                                 | 0                                       | NOT APPLICABLE                               | NOT APPLICABLE   |
| (16)     |                                 |   | (SEE STATEMENT)                          |                               |                                 |  |   |  |  |

**2** Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as a tax exempt 501(c)(3) organization by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter . . . ▶ 12

**3** Enter total number of other organizations or entities . . . ▶ 11

**Part III Grants and Other Assistance to Individuals Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 16. Part III can be duplicated if additional space is needed.

| (a) Type of grant or assistance   | (b) Region                               | (c) Number of recipients | (d) Amount of cash grant | (e) Manner of cash disbursement | (f) Amount of noncash assistance | (g) Description of noncash assistance | (h) Method of valuation (book, FMV, appraisal, other) |
|-----------------------------------|--|--------------------------|--------------------------|---------------------------------|----------------------------------|---------------------------------------|---|
| (1) ENGINEERING ACHIEVEMENT AWARD | CENTRAL AMERICA AND THE CARIBBEAN        | 5                        | 4,500                    | WIRES                           | 0                                | NOT APPLICABLE                        | NOT APPLICABLE  |
| (2) ENGINEERING ACHIEVEMENT AWARD | EAST ASIA AND THE PACIFIC                | 420                      | 262,422                  | CHECKS; WIRE TRANSFERS          | 0                                | NOT APPLICABLE                        | NOT APPLICABLE  |
| (3) ENGINEERING ACHIEVEMENT AWARD | EUROPE (INCLUDING ICELAND AND GREENLAND) | 244                      | 224,192                  | CHECKS; WIRE TRANSFERS          | 0                                | NOT APPLICABLE                        | NOT APPLICABLE  |
| (4) ENGINEERING ACHIEVEMENT AWARD | MIDDLE EAST AND NORTH AFRICA             | 28                       | 22,581                   | CHECKS; WIRE TRANSFERS          | 0                                | NOT APPLICABLE                        | NOT APPLICABLE  |
| (5) ENGINEERING ACHIEVEMENT AWARD | NORTH AMERICA (CANADA & MEXICO ONLY)     | 78                       | 51,937                   | CHECKS; WIRE TRANSFERS          | 0                                | NOT APPLICABLE                        | NOT APPLICABLE  |
| (6) ENGINEERING ACHIEVEMENT AWARD | SOUTH AMERICA                            | 29                       | 20,600                   | CHECKS; WIRE TRANSFERS          | 0                                | NOT APPLICABLE                        | NOT APPLICABLE  |
| (7) ENGINEERING ACHIEVEMENT AWARD | SOUTH ASIA                               | 61                       | 45,571                   | CHECKS; WIRE TRANSFERS          | 0                                | NOT APPLICABLE                        | NOT APPLICABLE  |
| (8) ENGINEERING ACHIEVEMENT AWARD | SUB-SAHARAN AFRICA                       | 15                       | 13,100                   | WIRES                           | 0                                | NOT APPLICABLE                        | NOT APPLICABLE  |
| (9) ENGINEERING ACHIEVEMENT AWARD | RUSSIA AND NEIGHBORING STATES            | 3                        | 1,200                    | WIRES                           | 0                                | NOT APPLICABLE                        | NOT APPLICABLE  |
| (10) ENGINEERING DEVELOPMENT      | EAST ASIA AND THE PACIFIC                | 102                      | 40,979                   | CHECKS; WIRE TRANSFERS          | 0                                | NOT APPLICABLE                        | NOT APPLICABLE  |
| (11) ENGINEERING DEVELOPMENT      | EUROPE (INCLUDING ICELAND AND GREENLAND) | 35                       | 45,030                   | CHECKS; WIRE TRANSFERS          | 0                                | NOT APPLICABLE                        | NOT APPLICABLE  |
| (12) ENGINEERING DEVELOPMENT      | MIDDLE EAST AND NORTH AFRICA             | 3                        | 5,500                    | WIRES                           | 0                                | NOT APPLICABLE                        | NOT APPLICABLE  |
| (13) ENGINEERING DEVELOPMENT      | NORTH AMERICA (CANADA & MEXICO ONLY)     | 10                       | 10,350                   | WIRES                           | 0                                | NOT APPLICABLE                        | NOT APPLICABLE  |
| (14) ENGINEERING DEVELOPMENT      | SOUTH AMERICA                            | 4                        | 5,075                    | WIRES                           | 0                                | NOT APPLICABLE                        | NOT APPLICABLE  |
| (15) ENGINEERING DEVELOPMENT      | SOUTH ASIA                               | 31                       | 33,076                   | CHECKS; WIRE TRANSFERS          | 0                                | NOT APPLICABLE                        | NOT APPLICABLE  |
| (16) ENGINEERING DEVELOPMENT      | SUB-SAHARAN AFRICA                       | 2                        | 2,232                    | WIRES                           | 0                                | NOT APPLICABLE                        | NOT APPLICABLE  |
| (17) ENGINEERING FELLOWSHIP       | EAST ASIA AND THE PACIFIC                | 11                       | 44,500                   | WIRES                           | 0                                | NOT APPLICABLE                        | NOT APPLICABLE  |
| (18) (SEE STATEMENT)              |  |                          |                          |                                 |                                  |                                       |   |

**Part IV Foreign Forms**

- 1 Was the organization a U.S. transferor of property to a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see Instructions for Form 926)* . . . . .  Yes  No
  
- 2 Did the organization have an interest in a foreign trust during the tax year? *If "Yes," the organization may be required to separately file Form 3520, Annual Return To Report Transactions With Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign Trust With a U.S. Owner (see Instructions for Forms 3520 and 3520-A; don't file with Form 990)* . . . . .  Yes  No
  
- 3 Did the organization have an ownership interest in a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons With Respect to Certain Foreign Corporations (see Instructions for Form 5471)* . . . . .  Yes  No
  
- 4 Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? *If "Yes," the organization may be required to file Form 8621, Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund (see Instructions for Form 8621)* . . . . .  Yes  No
  
- 5 Did the organization have an ownership interest in a foreign partnership during the tax year? *If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons With Respect to Certain Foreign Partnerships (see Instructions for Form 8865)* . . . . .  Yes  No
  
- 6 Did the organization have any operations in or related to any boycotting countries during the tax year? *If "Yes," the organization may be required to separately file Form 5713, International Boycott Report (see Instructions for Form 5713; don't file with Form 990)* . . . . .  Yes  No

**Part I**

**Activities per Region (continued)**

| (a)<br>Region                             | (b)<br>Number of offices in the region | (c)<br>Number of employees, agents, and independent contractors in region | (d)<br>Activities conducted in region (by type) (e.g., fundraising, program services, investments, grants to recipients located in the region) | (e)<br>If activity listed in (d) is a program service, describe specific type of service(s) in region   | (f)<br>Total expenditures for and investments in region |
|---|--|---|--|---|---|
| (17) NORTH AMERICA (CANADA & MEXICO ONLY) | 0                                      | 0   | PROGRAM SERVICES   | MEMBER SUPPORT  | 328,576   |
| (18) NORTH AMERICA (CANADA & MEXICO ONLY) | 0                                      | 0   | PROGRAM SERVICES   | CONFERENCES   | 3,167,909   |
| (19) NORTH AMERICA (CANADA & MEXICO ONLY) | 1                                      | 17  | PROGRAM SERVICES   | STANDARDS   | 1,721,476   |
| (20) NORTH AMERICA (CANADA & MEXICO ONLY) | 0                                      | 0   | GRANTMAKING  | NOT APPLICABLE  | 136,930   |
| (21) RUSSIA AND NEIGHBORING STATES        | 0                                      | 0   | PROGRAM SERVICES   | MEMBER SUPPORT  | 29,841  |
| (22) RUSSIA AND NEIGHBORING STATES        | 0                                      | 0   | PROGRAM SERVICES   | CONFERENCES   | 121,043   |
| (23) RUSSIA AND NEIGHBORING STATES        | 0                                      | 2   | PROGRAM SERVICES   | STANDARDS   | 21,577  |
| (24) RUSSIA AND NEIGHBORING STATES        | 0                                      | 0   | GRANTMAKING  | NOT APPLICABLE  | 181,575   |
| (25) SOUTH AMERICA                        | 0                                      | 0   | PROGRAM SERVICES   | MEMBER SUPPORT  | 253,179   |
| (26) SOUTH AMERICA                        | 0                                      | 0   | PROGRAM SERVICES   | CONFERENCES   | 1,125,801   |
| (27) SOUTH AMERICA                        | 0                                      | 0   | PROGRAM SERVICES   | STANDARDS   | 482,372   |
| (28) SOUTH AMERICA                        | 0                                      | 0   | GRANTMAKING  | NOT APPLICABLE  | 74,886  |
| (29) SOUTH ASIA                           | 0                                      | 0   | PROGRAM SERVICES   | MEMBER SUPPORT  | 818,205   |
| (30) SOUTH ASIA                           | 0                                      | 0   | PROGRAM SERVICES   | CONFERENCES   | 322,479   |
| (31) SOUTH ASIA                           | 0                                      | 0   | PROGRAM SERVICES   | STANDARDS   | 744,302   |
| (32) SOUTH ASIA                           | 0                                      | 0   | GRANTMAKING  | NOT APPLICABLE  | 209,727   |
| (33) SUB-SAHARAN AFRICA                   | 0                                      | 3   | PROGRAM SERVICES   | MEMBER SUPPORT  | 15,375  |
| (34) SUB-SAHARAN AFRICA                   | 0                                      | 0   | PROGRAM SERVICES   | CONFERENCES   | 234,612   |
| (35) SUB-SAHARAN AFRICA                   | 0                                      | 0   | PROGRAM SERVICES   | STANDARDS   | 71,146  |
| (36) SUB-SAHARAN AFRICA                   | 0                                      | 0   | GRANTMAKING  | NOT APPLICABLE  | 62,975  |
| (37)                                      |  |   | PROGRAM SERVICES   | A MAJORITY OF THE EMPLOYEES, AGENTS, AND INDEPENDENT CONTRACTORS REPORTED IN SCHEDULE F, PART I ARE INDEPENDENT CONTRACTORS THAT PROVIDE SHORT-TERM TEMPORARY CONTRACT WORK FOR IEEE. |   |

**Part II****Grants and Other Assistance to Organizations or Entities Outside the United States** (continued)

| (a)<br>Name of Organization | (b)<br>IRS code section and EIN | (c)<br>Region                            | (d)<br>Purpose of grant | (e)<br>Amount of cash grant | (f)<br>Manner of cash disbursement | (g)<br>Amount of non-cash assistance | (h)<br>Description of non-cash assistance | (i)<br>Method of valuation (book, FMV, appraisal, other) |
|-----------------------------|---------------------------------|--|-------------------------|-----------------------------|------------------------------------|--------------------------------------|---|--|
| (16)                        |                                 | NORTH AMERICA (CANADA & MEXICO ONLY)     | ENGINEERING DEVELOPMENT | 10,000                      | CHECKS                             | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |
| (17)                        |                                 | RUSSIA AND NEIGHBORING STATES            | ENGINEERING DEVELOPMENT | 180,000                     | CHECKS                             | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |
| (18)                        |                                 | MIDDLE EAST AND NORTH AFRICA             | ENGINEERING DEVELOPMENT | 11,000                      | CHECKS                             | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |
| (19)                        |                                 | SOUTH AMERICA                            | ENGINEERING DEVELOPMENT | 25,000                      | CHECKS                             | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |
| (20)                        |                                 | EAST ASIA AND THE PACIFIC                | ENGINEERING DEVELOPMENT | 37,000                      | CHECKS                             | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |
| (21)                        |                                 | EUROPE (INCLUDING ICELAND AND GREENLAND) | ENGINEERING DEVELOPMENT | 9,983                       | CHECKS                             | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |
| (22)                        |                                 | EUROPE (INCLUDING ICELAND AND GREENLAND) | ENGINEERING DEVELOPMENT | 10,000                      | CHECKS                             | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |
| (23)                        |                                 | EUROPE (INCLUDING ICELAND AND GREENLAND) | ENGINEERING DEVELOPMENT | 9,820                       | CHECKS                             | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |

**Part III****Grants and Other Assistance to Individuals Outside the United States** (continued)

| (a)<br>Type of grant or assistance | (b)<br>Region                            | (c)<br>Number of recipients | (d)<br>Amount of cash grant | (e)<br>Manner of cash disbursement | (f)<br>Amount of non-cash assistance | (g)<br>Description of non-cash assistance | (h)<br>Method of valuation (book, FMV, appraisal, other) |
|------------------------------------|--|-----------------------------|-----------------------------|------------------------------------|--------------------------------------|---|--|
| (18)<br>ENGINEERING FELLOWSHIP     | EUROPE (INCLUDING ICELAND AND GREENLAND) | 8                           | 31,500                      | WIRES                              | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |
| (19)<br>ENGINEERING FELLOWSHIP     | MIDDLE EAST AND NORTH AFRICA             | 1                           | 6,000                       | WIRES                              | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |
| (20)<br>ENGINEERING FELLOWSHIP     | NORTH AMERICA (CANADA & MEXICO ONLY)     | 2                           | 12,000                      | WIRES                              | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |
| (21)<br>ENGINEERING FELLOWSHIP     | SOUTH ASIA                               | 3                           | 5,000                       | WIRES                              | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |
| (22)<br>ENGINEERING SCHOLARSHIP    | EAST ASIA AND THE PACIFIC                | 10                          | 11,700                      | WIRES                              | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |
| (23)<br>ENGINEERING SCHOLARSHIP    | EUROPE (INCLUDING ICELAND AND GREENLAND) | 11                          | 9,800                       | WIRES                              | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |
| (24)<br>ENGINEERING SCHOLARSHIP    | MIDDLE EAST AND NORTH AFRICA             | 5                           | 2,600                       | WIRES                              | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |
| (25)<br>ENGINEERING SCHOLARSHIP    | NORTH AMERICA (CANADA & MEXICO ONLY)     | 3                           | 4,000                       | WIRES                              | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |
| (26)<br>ENGINEERING SCHOLARSHIP    | SUB-SAHARAN AFRICA                       | 2                           | 1,400                       | WIRES                              | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |
| (27)<br>ENGINEERING SCHOLARSHIP    | SOUTH ASIA                               | 37                          | 36,875                      | WIRES                              | 0                                    | NOT APPLICABLE                            | NOT APPLICABLE   |

Part V

**Supplemental Information.** Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information (see instructions).

| Return Reference - Identifier   | Explanation  |
|---|--|
| SCHEDULE F, PART I, LINE 2 - PROCEDURES FOR MONITORING USE OF GRANT FUNDS                           | IEEE, THROUGH ITS AWARDS BOARD, ESTABLISHES POLICIES AND PROCEDURES TO PROVIDE FOR THE ORDERLY DEVELOPMENT AND IMPLEMENTATION OF AWARDS, SCHOLARSHIPS, AND RECOGNITION PROGRAMS. THE AWARDS ADMINISTERED BY THE AWARDS BOARD AND ITS COMMITTEES ARE APPROVED BY THE BOARD OF DIRECTORS. THE BOARD OF DIRECTORS HAS DELEGATED APPROVAL AUTHORITY, IN ACCORDANCE WITH THE ESTABLISHED POLICIES AND PROCEDURES, TO THOSE MAJOR BOARDS HAVING CHARTERED AWARDS AND RECOGNITION COMMITTEES.   |
| SCHEDULE F, PART I, LINE 3 - METHOD USED TO ACCOUNT FOR EXPENDITURES ON ORG'S FINANCIAL STATEMENTS  | CENTRAL AMERICA AND THE CARIBBEAN -OTHER.:OTHER:IEEE BOOKS AND RECORDS ARE MAINTAINED ON AN ACCRUAL BASIS. CERTAIN GRANTS ARE TRACKED ON A CASH BASIS AND THE GRANT DETAILS REPORTED ON THIS SCHEDULE ARE REPORTED ON THE CASH BASIS.<br>EAST ASIA AND THE PACIFIC -OTHER.:OTHER:IEEE BOOKS AND RECORDS ARE MAINTAINED ON AN ACCRUAL BASIS. CERTAIN GRANTS ARE TRACKED ON A CASH BASIS AND THE GRANT DETAILS REPORTED ON THIS SCHEDULE ARE REPORTED ON THE CASH BASIS.<br>EUROPE (INCLUDING ICELAND AND GREENLAND) -OTHER.:OTHER:IEEE BOOKS AND RECORDS ARE MAINTAINED ON AN ACCRUAL BASIS. CERTAIN GRANTS ARE TRACKED ON A CASH BASIS AND THE GRANT DETAILS REPORTED ON THIS SCHEDULE ARE REPORTED ON THE CASH BASIS.<br>MIDDLE EAST AND NORTH AFRICA -OTHER.:OTHER:IEEE BOOKS AND RECORDS ARE MAINTAINED ON AN ACCRUAL BASIS. CERTAIN GRANTS ARE TRACKED ON A CASH BASIS AND THE GRANT DETAILS REPORTED ON THIS SCHEDULE ARE REPORTED ON THE CASH BASIS.<br>NORTH AMERICA (CANADA & MEXICO ONLY) -OTHER.:OTHER:IEEE BOOKS AND RECORDS ARE MAINTAINED ON AN ACCRUAL BASIS. CERTAIN GRANTS ARE TRACKED ON A CASH BASIS AND THE GRANT DETAILS REPORTED ON THIS SCHEDULE ARE REPORTED ON THE CASH BASIS.<br>RUSSIA AND NEIGHBORING STATES -OTHER.:OTHER:IEEE BOOKS AND RECORDS ARE MAINTAINED ON AN ACCRUAL BASIS. CERTAIN GRANTS ARE TRACKED ON A CASH BASIS AND THE GRANT DETAILS REPORTED ON THIS SCHEDULE ARE REPORTED ON THE CASH BASIS.<br>SOUTH AMERICA -OTHER:<br>SOUTH ASIA -OTHER.:OTHER:IEEE BOOKS AND RECORDS ARE MAINTAINED ON AN ACCRUAL BASIS. CERTAIN GRANTS ARE TRACKED ON A CASH BASIS AND THE GRANT DETAILS REPORTED ON THIS SCHEDULE ARE REPORTED ON THE CASH BASIS.<br>SUB-SAHARAN AFRICA -OTHER.:OTHER:IEEE BOOKS AND RECORDS ARE MAINTAINED ON AN ACCRUAL BASIS. CERTAIN GRANTS ARE TRACKED ON A CASH BASIS AND THE GRANT DETAILS REPORTED ON THIS SCHEDULE ARE REPORTED ON THE CASH BASIS. |
| SCHEDULE F, PART II, LINE 1 - METHOD USED TO ACCOUNT FOR EXPENDITURES ON ORG'S FINANCIAL STATEMENTS | CENTRAL AMERICA AND THE CARIBBEAN -ACCRUAL<br>EAST ASIA AND THE PACIFIC -ACCRUAL<br>EUROPE (INCLUDING ICELAND AND GREENLAND) -ACCRUAL<br>MIDDLE EAST AND NORTH AFRICA -ACCRUAL<br>NORTH AMERICA (CANADA & MEXICO ONLY) -ACCRUAL<br>RUSSIA AND NEIGHBORING STATES -ACCRUAL<br>SOUTH AMERICA -ACCRUAL<br>SOUTH ASIA -ACCRUAL   |
| SCHEDULE F, PART III - METHOD USED TO ACCOUNT FOR EXPENDITURES ON ORG'S FINANCIAL STATEMENTS        | CENTRAL AMERICA AND THE CARIBBEAN -ACCRUAL<br>EAST ASIA AND THE PACIFIC -ACCRUAL<br>EUROPE (INCLUDING ICELAND AND GREENLAND) -ACCRUAL<br>MIDDLE EAST AND NORTH AFRICA -ACCRUAL<br>NORTH AMERICA (CANADA & MEXICO ONLY) -ACCRUAL<br>RUSSIA AND NEIGHBORING STATES -ACCRUAL<br>SOUTH AMERICA -ACCRUAL<br>SOUTH ASIA -ACCRUAL<br>SUB-SAHARAN AFRICA -ACCRUAL  |



**SCHEDULE I  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**

Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

Attach to Form 990.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2022**

**Open to Public  
Inspection**

Name of the organization

INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS, INC.

Employer identification number

13-1656633

**Part I General Information on Grants and Assistance**

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  Yes  No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

**Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments.** Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

| (a) Name and address of organization or government                                  | (b) EIN    | (c) IRC section (if applicable) | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of noncash assistance | (h) Purpose of grant or assistance |
|---|------------|---------------------------------|--------------------------|----------------------------------|---|---------------------------------------|------------------------------------|
| (1) IEEE FOUNDATION INC<br>445 HOES LANE, PISCATAWAY, NONE                          | 23-1710664 | 501(C)(3)                       | 3,519,229                | 0                                | NOT APPLICABLE  | NOT APPLICABLE                        | ENGINEERING DEVELOPMENT            |
| (2) ASEF<br>2415 STRATTON DR, POTOMAC   | 31-1627361 | 501(C)(3)                       | 100,000                  | 0                                | NOT APPLICABLE  | NOT APPLICABLE                        | ENGINEERING DEVELOPMENT            |
| (3) UNIVERSITY OF ARIZONA FDN.<br>UNIV OF ARIZONA, ENGRG PROF., TUCSON, NONE        | 86-6050388 | 501(C)(3)                       | 100,000                  | 0                                | NOT APPLICABLE  | NOT APPLICABLE                        | ENGINEERING DEVELOPMENT            |
| (4) REGENTS OF THE UNIVERSITY OF MICHIGAN<br>3003 S STATE ST, ANN ARBOR, NONE       | 38-6006309 | STATE GOV'T                     | 65,000                   | 0                                | NOT APPLICABLE  | NOT APPLICABLE                        | ENGINEERING DEVELOPMENT            |
| (5) DAKOTA STATE UNIVERSITY<br>820 N WASHINGTON AVE, MADISON, NONE                  | 46-6000364 | STATE GOV'T                     | 25,000                   | 0                                | NOT APPLICABLE  | NOT APPLICABLE                        | ENGINEERING DEVELOPMENT            |
| (6) ACARE, INC.<br>2200 COMMONWEALTH BLVD., ANN ARBOR                               | 82-2441682 | 501(C)(3)                       | 24,815                   | 0                                | NOT APPLICABLE  | NOT APPLICABLE                        | ENGINEERING DEVELOPMENT            |
| (7) VILLANOVA UNIV.<br>ELEC & COMP ENGRG, VILLANOVA                                 | 23-1352688 | 501(C)(3)                       | 23,500                   | 0                                | NOT APPLICABLE  | NOT APPLICABLE                        | ENGINEERING DEVELOPMENT            |
| (8) ACM, INC.<br>1601 BROADWAY, NEW YORK  | 13-1921358 | 501(C)(3)                       | 22,660                   | 0                                | NOT APPLICABLE  | NOT APPLICABLE                        | (SEE STATEMENT)                    |
| (9) THE GEORGE WASHINGTON UNIVERSITY<br>PNC BANK, 800 17TH ST, NW, WASHINGTON, NONE | 53-0196584 | 501(C)(3)                       | 22,630                   | 0                                | NOT APPLICABLE  | NOT APPLICABLE                        | ENGINEERING DEVELOPMENT            |
| (10) ROCHESTER INSTITUTE OF TECHNOLOGY<br>7 LOMB MEMORIAL DR, ROCHESTER, NONE       | 16-0743140 | 501(C)(3)                       | 20,500                   | 0                                | NOT APPLICABLE  | NOT APPLICABLE                        | ENGINEERING DEVELOPMENT            |
| (11) REGIS UNIVERSITY<br>3333 REGIS BLVD, DENVER, NONE                              | 84-0402707 | 501(C)(3)                       | 19,307                   | 0                                | NOT APPLICABLE  | NOT APPLICABLE                        | ENGINEERING SCHOLARSHIP            |
| (12) (SEE STATEMENT)  |            |                                 |                          |                                  |   |                                       |                                    |

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table 23

3 Enter total number of other organizations listed in the line 1 table 1

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Cat. No. 50055P

Schedule I (Form 990) 2022

**Part III Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered “Yes” on Form 990, Part IV, line 22.  
 Part III can be duplicated if additional space is needed.

| (a) Type of grant or assistance | (b) Number of recipients | (c) Amount of cash grant | (d) Amount of noncash assistance | (e) Method of valuation (book, FMV, appraisal, other) | (f) Description of noncash assistance |
|---------------------------------|--------------------------|--------------------------|----------------------------------|---|---------------------------------------|
| 1 ENGINEERING ACHIEVEMENT AWARD | 363                      | 446,288                  | 0                                | NOT APPLICABLE  | NOT APPLICABLE                        |
| 2 ENGINEERING DEVELOPMENT       | 68                       | 56,281                   | 0                                | NOT APPLICABLE  | NOT APPLICABLE                        |
| 3 ENGINEERING FELLOWSHIP        | 19                       | 352,000                  | 0                                | NOT APPLICABLE  | NOT APPLICABLE                        |
| 4 ENGINEERING SCHOLARSHIP       | 18                       | 17,900                   | 0                                | NOT APPLICABLE  | NOT APPLICABLE                        |
| 5                               |                          |                          |                                  |   |                                       |
| 6                               |                          |                          |                                  |   |                                       |
| 7                               |                          |                          |                                  |   |                                       |

**Part IV Supplemental Information.** Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

(SEE STATEMENT)

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## Part II

## Grants and Other Assistance to Governments and Organizations in the United States (continued)

| (a)<br>Name and address of organization or government  | (b)<br>EIN | (c)<br>IRC section if applicable | (d)<br>Amount of cash grant | (e)<br>Amount of non-cash assistance | (f)<br>Method of valuation (book, FMV, appraisal, other) | (g)<br>Description of non-cash assistance | (h)<br>Purpose of grant or assistance |
|--|------------|----------------------------------|-----------------------------|--------------------------------------|--|---|---------------------------------------|
| (12) NNU, INC.<br>623 UNIV. BLVD, NAMPA, ID 83686  | 82-0200907 | 501(C)(3)                        | 15,870                      | 0                                    | NOT APPLICABLE   | NOT APPLICABLE                            | ENGINEERING DEVELOPMENT               |
| (13) AMERICAN INSTITUTE OF CHEMICAL ENGINEERS<br>120 WALL ST, 23RD FL, NEW YORK, NONE                                      | 13-1623892 | 501(C)(3)                        | 13,300                      | 0                                    | NOT APPLICABLE   | NOT APPLICABLE                            | ENGINEERING ACHIEVEMENT AWARD         |
| (14) OHIO UNIVERSITY<br>010 CHUBB HALL, PO BOX 960 A, ATHENS, NONE   | 31-6402113 | STATE GOV'T                      | 12,185                      | 0                                    | NOT APPLICABLE   | NOT APPLICABLE                            | ENGINEERING DEVELOPMENT               |
| (15) ST. FRANCIS BY THE LAKE EPISCOPAL CHURCH<br>P.O. BOX 2031 , CANYON LAKE, NONE   | 74-2303905 | 501(C)(3)                        | 11,250                      | 0                                    | NOT APPLICABLE   | NOT APPLICABLE                            | ENGINEERING SCHOLARSHIP               |
| (16) AMERICAN AUTOMATIC CONTROL COUNCIL<br>C/O LINDA BUSHNELL, UW EE, 185 NE S, SEATTLE, NONE                              | 11-6017940 | 501(C)(3)                        | 10,000                      | 0                                    | NOT APPLICABLE   | NOT APPLICABLE                            | ENGINEERING DEVELOPMENT               |
| (17) ASSOCIATION OF FEDERAL COMMUNICATIONS CONSULTING ENGINEERS SCHOLARSHIP FUND, INC.<br>PO BOX 19333, WASHINGTON, NONE   | 52-1374920 | 501(C)(3)                        | 10,000                      | 0                                    | NOT APPLICABLE   | NOT APPLICABLE                            | ENGINEERING DEVELOPMENT               |
| (18) BOARD OF TRUSTEES OF MICHIGAN STATE UNIVERSITY<br>426 AUDITORIUM ROAD, ROOM 360, EAST LANSING, NONE                   | 38-6005984 | 501(C)(3)                        | 10,000                      | 0                                    | NOT APPLICABLE   | NOT APPLICABLE                            | ENGINEERING DEVELOPMENT               |
| (19) THE TRUSTEES OF UNION COLLEGE IN THE TOWN OF SCHENECTADY IN THE STATE OF NEW YORK<br>807 UNION ST , SCHENECTADY, NONE | 14-1338580 | 501(C)(3)                        | 10,000                      | 0                                    | NOT APPLICABLE   | NOT APPLICABLE                            | ENGINEERING SCHOLARSHIP               |
| (20) ELECTRIQ POWER, INC.<br>1937 DAVIS ST, UNIT A1, SAN LEANDRO, NONE   | 47-1678965 | CORPORATION                      | 10,000                      | 0                                    | NOT APPLICABLE   | NOT APPLICABLE                            | ENGINEERING ACHIEVEMENT AWARD         |
| (21) NORTH CAROLINA STATE UNIVERSITY<br>DEPT OF ELEC & COMP , ATTN: ENGRG LY, RALEIGH, NONE                                | 56-6000756 | STATE GOV'T                      | 10,000                      | 0                                    | NOT APPLICABLE   | NOT APPLICABLE                            | ENGINEERING DEVELOPMENT               |
| (22) CAPITOL AREA COUNCIL, INC. BOY SCOUTS OF AMERICA<br>12500 N. IH 35 , AUSTIN, NONE                                     | 74-1143057 | 501(C)(3)                        | 8,400                       | 0                                    | NOT APPLICABLE   | NOT APPLICABLE                            | ENGINEERING DEVELOPMENT               |
| (23) SOCIALITE LIGHTING SYSTEMS INC.<br>SOCIALITE LIGHTING SYSTEMS INC., 11, MONROE, NONE                                  | 82-2471849 | 501(C)(3)                        | 6,000                       | 0                                    | NOT APPLICABLE   | NOT APPLICABLE                            | ENGINEERING DEVELOPMENT               |
| (24) UNIVERSITY OF WASHINGTON<br>4300 ROOSEVELT WAY NE, BOX 354965, SEATTLE, NONE  | 91-6001537 | STATE GOV'T                      | 5,234                       | 0                                    | NOT APPLICABLE   | NOT APPLICABLE                            | ENGINEERING DEVELOPMENT               |

**Part IV**

**Supplemental Information.** Provide the information required in Part I, line 2, Part III, column (b), and any other additional information.

| Return Reference - Identifier  | Explanation  |
|--|--|
| SCHEDULE I, PART I, LINE 2 - PROCEDURES FOR MONITORING USE OF GRANT FUNDS. | IEEE, THROUGH ITS AWARDS BOARD, ESTABLISHES POLICIES AND PROCEDURES TO PROVIDE FOR THE ORDERLY DEVELOPMENT AND IMPLEMENTATION OF AWARDS, SCHOLARSHIPS, AND RECOGNITION PROGRAMS. THE AWARDS ADMINISTERED BY THE AWARDS BOARD AND ITS COMMITTEES ARE APPROVED BY THE BOARD OF DIRECTORS. THE BOARD OF DIRECTORS HAS DELEGATED APPROVAL AUTHORITY, IN ACCORDANCE WITH THE ESTABLISHED POLICIES AND PROCEDURES, TO THOSE MAJOR BOARDS HAVING CHARTERED AWARDS AND RECOGNITION COMMITTEES. |
| SCHEDULE I, PART II , COLUMN H - PURPOSE OF GRANT OR ASSISTANCE            | ACM, INC.:<br>ENGINEERING ACHIEVEMENT AWARD  |
| SCHEDULE I, PART IV - SCHEDULE I, PARTS I, II AND III                      | IEEE BOOKS AND RECORDS ARE MAINTAINED ON AN ACCRUAL BASIS. CERTAIN GRANTS ARE TRACKED ON A CASH BASIS AND THE GRANT DETAILS REPORTED ON THIS SCHEDULE ARE REPORTED ON THE CASH BASIS.  |

**SCHEDULE J  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

Name of the organization

**Compensation Information**

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees  
Complete if the organization answered "Yes" on Form 990, Part IV, line 23.  
Attach to Form 990.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2022**

**Open to Public Inspection**

INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS, INC.

Employer identification number

13-1656633

**Part I Questions Regarding Compensation**

|   | Yes       | No |
|---|-----------|----|
| <p><b>1a</b> Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.</p> <p> <input type="checkbox"/> First-class or charter travel                      <input type="checkbox"/> Housing allowance or residence for personal use<br/> <input type="checkbox"/> Travel for companions                                      <input type="checkbox"/> Payments for business use of personal residence<br/> <input type="checkbox"/> Tax indemnification and gross-up payments              <input type="checkbox"/> Health or social club dues or initiation fees<br/> <input type="checkbox"/> Discretionary spending account                              <input type="checkbox"/> Personal services (such as maid, chauffeur, chef)                 </p> |           |    |
| <p><b>b</b> If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain . . . . .</p>  | <b>1b</b> |    |
| <p><b>2</b> Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a? . . . . .</p>  | <b>2</b>  |    |
| <p><b>3</b> Indicate which, if any, of the following the organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.</p> <p> <input checked="" type="checkbox"/> Compensation committee                                      <input type="checkbox"/> Written employment contract<br/> <input checked="" type="checkbox"/> Independent compensation consultant                      <input checked="" type="checkbox"/> Compensation survey or study<br/> <input checked="" type="checkbox"/> Form 990 of other organizations                              <input checked="" type="checkbox"/> Approval by the board or compensation committee                 </p>   |           |    |
| <p><b>4</b> During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:</p>  |           |    |
| <p><b>a</b> Receive a severance payment or change-of-control payment? . . . . .</p>   | <b>4a</b> | ✓  |
| <p><b>b</b> Participate in or receive payment from a supplemental nonqualified retirement plan? . . . . .</p>   | <b>4b</b> | ✓  |
| <p><b>c</b> Participate in or receive payment from an equity-based compensation arrangement? . . . . .</p> <p>If "Yes" to any of lines 4a–c, list the persons and provide the applicable amounts for each item in Part III.</p>   | <b>4c</b> | ✓  |
| <p><b>Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5–9.</b></p>  |           |    |
| <p><b>5</b> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:</p>  |           |    |
| <p><b>a</b> The organization? . . . . .</p>   | <b>5a</b> | ✓  |
| <p><b>b</b> Any related organization? . . . . .</p> <p>If "Yes" on line 5a or 5b, describe in Part III.</p>   | <b>5b</b> | ✓  |
| <p><b>6</b> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:</p>  |           |    |
| <p><b>a</b> The organization? . . . . .</p>   | <b>6a</b> | ✓  |
| <p><b>b</b> Any related organization? . . . . .</p> <p>If "Yes" on line 6a or 6b, describe in Part III.</p>   | <b>6b</b> | ✓  |
| <p><b>7</b> For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III . . . . .</p>   | <b>7</b>  | ✓  |
| <p><b>8</b> Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III . . . . .</p>   | <b>8</b>  | ✓  |
| <p><b>9</b> If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? . . . . .</p>  | <b>9</b>  |    |

**Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

**Note:** The sum of columns (B)(i)–(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

| (A) Name and Title   |      | (B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation |                                     |                                     | (C) Retirement and other deferred compensation | (D) Nontaxable benefits | (E) Total of columns (B)(i)–(D) | (F) Compensation in column (B) reported as deferred on prior Form 990 |
|--|------|--|-------------------------------------|-------------------------------------|--|-------------------------|---------------------------------|---|
|  |      | (i) Base compensation  | (ii) Bonus & incentive compensation | (iii) Other reportable compensation |  |                         |                                 |   |
| <b>1</b> STEPHEN WELBY<br>ASSISTANT SECRETARY & EXECUTIVE DIRECTOR           | (i)  | 665,413  | 210,605                             | 216,903                             | 214,124  | 1,000                   | 1,308,045                       | 152,931   |
|  | (ii) | 0  | 0                                   | 0                                   | 0  | 0                       | 0                               | 0   |
| <b>2</b> MARY WARD-CALLAN<br>MANAGING DIRECTOR TECH ACTIVITIES               | (i)  | 427,210  | 109,860                             | 78,634                              | 39,900   | 17,532                  | 673,136                         | 0   |
|  | (ii) | 0  | 0                                   | 0                                   | 0  | 0                       | 0                               | 0   |
| <b>3</b> THOMAS SIEGERT<br>ASSISTANT TREASURER & CFO                         | (i)  | 440,297  | 89,454                              | 52,790                              | 39,900   | 11,325                  | 633,766                         | 0   |
|  | (ii) | 0  | 0                                   | 0                                   | 0  | 0                       | 0                               | 0   |
| <b>4</b> KONSTANTINOS KARACHALIOS<br>MANAGING DIRECTOR OF IEEE STANDARDS     | (i)  | 430,911  | 83,016                              | 57,863                              | 39,900   | 0                       | 611,690                         | 0   |
|  | (ii) | 0  | 0                                   | 0                                   | 0  | 0                       | 0                               | 0   |
| <b>5</b> FRANCIS STAPLES<br>SR DIRECTOR GLOBAL SALES & CUSTOMER OPERATIONS   | (i)  | 213,839  | 285,674                             | 45,077                              | 39,900   | 11,593                  | 596,083                         | 0   |
|  | (ii) | 0  | 0                                   | 0                                   | 0  | 0                       | 0                               | 0   |
| <b>6</b> SOPHIA MUIRHEAD<br>GENERAL COUNSEL & CHIEF COMPLIANCE OFFICER       | (i)  | 429,822  | 89,086                              | 7,894                               | 39,900   | 17,280                  | 583,982                         | 0   |
|  | (ii) | 0  | 0                                   | 0                                   | 0  | 0                       | 0                               | 0   |
| <b>7</b> EMILY CSERNICA<br>DIRECTOR NORTH AMERICAN SALES                     | (i)  | 129,309  | 346,933                             | 31,958                              | 44,663   | 5,504                   | 558,367                         | 0   |
|  | (ii) | 0  | 0                                   | 0                                   | 0  | 0                       | 0                               | 0   |
| <b>8</b> PAUL CANNING<br>DIRECTOR INTERNATIONAL SALES                        | (i)  | 158,419  | 274,574                             | 61,933                              | 39,900   | 11,773                  | 546,599                         | 0   |
|  | (ii) | 0  | 0                                   | 0                                   | 0  | 0                       | 0                               | 0   |
| <b>9</b> DONNA HOURICAN<br>STAFF EXECUTIVE, CORPORATE ACTIVITIES             | (i)  | 352,250  | 87,250                              | 40,405                              | 39,900   | 0                       | 519,805                         | 0   |
|  | (ii) | 0  | 0                                   | 0                                   | 0  | 0                       | 0                               | 0   |
| <b>10</b> CHERIF AMIRAT<br>CHIEF INFORMATION OFFICER                         | (i)  | 367,905  | 50,940                              | 9,187                               | 39,900   | 11,395                  | 479,327                         | 0   |
|  | (ii) | 0  | 0                                   | 0                                   | 0  | 0                       | 0                               | 0   |
| <b>11</b> KAREN HAWKINS<br>CHIEF MARKETING OFFICER                           | (i)  | 329,454  | 62,146                              | 16,090                              | 39,900   | 16,383                  | 463,973                         | 0   |
|  | (ii) | 0  | 0                                   | 0                                   | 0  | 0                       | 0                               | 0   |
| <b>12</b> STEVEN HEFFNER<br>MANAGING DIRECTOR PUBLICATIONS                   | (i)  | 345,653  | 52,164                              | 870                                 | 38,372   | 2,538                   | 439,597                         | 0   |
|  | (ii) | 0  | 0                                   | 0                                   | 0  | 0                       | 0                               | 0   |
| <b>13</b> CECELIA JANKOWSKI<br>MANAGING DIRECTOR MEMBER & GEOUNIT ACTIVITIES | (i)  | 337,675  | 46,034                              | 14,411                              | 39,900   | 4,413                   | 442,433                         | 0   |
|  | (ii) | 0  | 0                                   | 0                                   | 0  | 0                       | 0                               | 0   |
| <b>14</b>  | (i)  |  |                                     |                                     |  |                         |                                 |   |
|  | (ii) |  |                                     |                                     |  |                         |                                 |   |
| <b>15</b>  | (i)  |  |                                     |                                     |  |                         |                                 |   |
|  | (ii) |  |                                     |                                     |  |                         |                                 |   |
| <b>16</b>  | (i)  |  |                                     |                                     |  |                         |                                 |   |
|  | (ii) |  |                                     |                                     |  |                         |                                 |   |

| Return Reference - Identifier   | Explanation  |
|---|--|
| SCHEDULE J, PART I, LINE 4B - SUPPLEMENTAL NONQUALIFIED RETIREMENT PLAN               | STEPHEN WELBY, EXECUTIVE DIRECTOR, IS THE ONLY PARTICIPANT IN A NONQUALIFIED, UNFUNDED, DEFERRED COMPENSATION PLAN UNDER SECTION 457(F) OF THE IRS CODE. THE NON-VESTED PORTION OF MR. WELBY'S DEFERRED COMPENSATION OF \$174,224 (CONTRIBUTION ACCRUAL) IS REPORTED IN SCHEDULE J, PART II, COLUMN C. MR. WELBY VESTED AND RECEIVED PREVIOUSLY DEFERRED COMPENSATION OF \$152,931 WHICH IS REPORTED IN SCHEDULE J, PART II, COLUMN B. AS THIS AMOUNT WAS PREVIOUSLY REPORTED ON A PRIOR YEAR FORM 990 AS DEFERRED COMPENSATION, THIS AMOUNT IS ALSO REPORTED IN SCHEDULE J, PART II, COLUMN F, PREVIOUSLY REPORTED DEFERRED COMPENSATION.   |
| SCHEDULE J, PART I, LINE 5A - COMPENSATION CONTINGENT ON REVENUES OF THE ORGANIZATION | IEEE OFFERS COMMISSION PAYMENTS TO SELECTED EMPLOYEES WHO WORK IN THE SALES CAPACITY INCLUDING INDIVIDUALS LISTED ON FORM 990, PART VII, SECTION A, LINE 1A. COMMISSIONS ARE BASED ON PREDETERMINED SALES GOALS AND PERFORMANCE CRITERIA AS DEFINED IN THE SALES COMMISSION PLAN FOR THE PLAN YEAR. COMMISSIONED EMPLOYEES TYPICALLY RECEIVE A COPY OF THE PLAN AT THE BEGINNING OF THE PLAN YEAR. EMPLOYEES ELIGIBLE TO EARN COMMISSIONS ARE NOT ELIGIBLE FOR INCENTIVE BONUSES UNDER THE INCENTIVE BONUS PLAN.   |
| SCHEDULE J, PART I, LINE 7 - NON-FIXED PAYMENTS                                       | IEEE MAINTAINS AN INCENTIVE COMPENSATION PROGRAM THAT INCLUDE OPPORTUNITIES TO EARN INCENTIVE COMPENSATION THAT WILL BE PAID WHEN THE INDIVIDUAL MEETS ESTABLISHED PERFORMANCE GOALS. AWARDS ARE BASED ON MARKET DATA AND ARE BASED ON THE INDIVIDUAL'S OVERALL PERFORMANCE RATING. INCENTIVE COMPENSATION FOR EACH EXECUTIVE IS REVIEWED AND APPROVED BY EITHER THE INDEPENDENT IEEE COMPENSATION COMMITTEES OR THE IEEE BOARD OF DIRECTORS.  |
| SCHEDULE J, PART I, LINE 3 -  | <p>THE IEEE BOARD OF DIRECTORS ENGAGED AN INDEPENDENT COMPENSATION CONSULTANT TO PROVIDE IEEE WITH MARKET COMPARABILITY DATA AND A REASONABLENESS RECOMMENDATION WITH RESPECT TO COMPENSATION PAID TO DISQUALIFIED PERSONS AS DEFINED UNDER SECTION 4958 OF THE INTERNAL REVENUE CODE OF 1986, TO ENABLE IEEE TO ESTABLISH A REBUTTABLE PRESUMPTION OF REASONABLENESS UNDER SECTION 4958.</p> <p>A COMMITTEE CONSISTING OF THE IEEE PRESIDENT, THE IEEE PAST PRESIDENT, AND THE IEEE PRESIDENT-ELECT (THE EXECUTIVE PERFORMANCE AND COMPENSATION COMMITTEE OR EPCC), ADVISED BY EXTERNAL LEGAL COUNSEL, IS CHARGED WITH EVALUATING THE TOTAL COMPENSATION PACKAGE OF THE IEEE EXECUTIVE DIRECTOR, WHO SERVES AS THE CHIEF OPERATIONS OFFICER ("ED &amp; COO"), AND A COMMITTEE OF INDEPENDENT BOARD MEMBERS AND NON-BOARD MEMBERS (THE IEEE EMPLOYEE BENEFITS &amp; COMPENSATION COMMITTEE OR EBCC), ADVISED BY EXTERNAL LEGAL COUNSEL, IS CHARGED WITH EVALUATING THE TOTAL COMPENSATION PACKAGE OF THE OTHER SELECTED EXECUTIVES AND STAFF, EXCLUDING THE IEEE ED &amp; COO.</p> <p>THE INDEPENDENT COMPENSATION CONSULTANT PROVIDED THESE COMMITTEES WITH MARKET DATA FROM PUBLISHED SOURCES FOR COMPARABLE POSITIONS FROM BOTH TAX-EXEMPT AND FOR-PROFIT ORGANIZATIONS. THE ASSESSMENT WAS CONDUCTED AT THE TOTAL REWARDS LEVEL AND INCLUDED ALL COMPENSATION COMPONENTS. FOR THE EPCC REVIEW OF THE EXECUTIVE DIRECTOR, EXTERNAL MARKET COMPARISONS WERE BASED ON TWO PRIMARY SOURCES OF DATA, WEIGHTED EQUALLY: (1) FORM 990 FILINGS FOR A GROUP OF PEER ORGANIZATIONS IDENTIFIED BY INDEPENDENT COMPENSATION CONSULTANT BASED ON VARIOUS CRITERIA AND (2) PUBLISHED SURVEYS, FOCUSING ON COMPARABLE ENTITIES. THE FOLLOWING SCREENING CRITERIA WERE USED TO IDENTIFY AND SELECT COMPARABLE ORGANIZATIONS: (1) NTEE CODE (A) GENERAL SCIENCE INSTITUTIONS, (B) ENGINEERING AND TECHNOLOGY SERVICES, (C) PROFESSIONAL SOCIETY, AND (D) RESEARCH INSTITUTIONS. (2) INCOME AND ASSETS. (3) EMPLOYEE SIZE.</p> <p>ONCE ORGANIZATIONS WERE SCREENED USING THESE CRITERIA, THE FOLLOWING INFORMATION WAS COLLECTED: (A) WHETHER THE ORGANIZATION HAS INTERNATIONAL PRESENCE, (B) WHETHER THEY ARE A STANDARD-SETTING ORGANIZATION; (C) WHETHER THEY HAVE A SIGNIFICANT PUBLISHING ACTIVITY; AND (D) THE EXTENT OF ITS FOCUS ON CONTRACT RESEARCH. THE EBCC RELIES ON SURVEY DATA AND DOES NOT CONSIDER FORM 990 FILINGS AS PART OF THEIR METHODOLOGY AND REVIEW.</p> <p>THE TWO COMMITTEES REVIEW INDIVIDUAL AND MARKET DATA AS PART OF THEIR PROCESS TO DETERMINE APPROPRIATE COMPENSATION. THE TWO COMMITTEES DEBATE AND DOCUMENT THEIR DECISIONS ABOUT WHAT IS REASONABLE AND THEIR DECISION-MAKING PROCESSES. THE INDEPENDENT COMPENSATION CONSULTANT PROVIDED A "PRESUMPTION OF REASONABLE COMPENSATION" OPINION LETTER FOR THE IEEE FILES, DOCUMENTING ITS ANALYSIS AND RECOMMENDATIONS REGARDING MARKET REASONABLENESS.</p> |

**SCHEDULE L  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Transactions With Interested Persons**

Complete if the organization answered "Yes" on Form 990, Part IV, line 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.

Attach to Form 990 or Form 990-EZ.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2022**

**Open To Public Inspection**

Name of the organization

INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS, INC.

Employer identification number

13-1656633

**Part I Excess Benefit Transactions** (section 501(c)(3), section 501(c)(4), and section 501(c)(29) organizations only).

Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b.

| 1   | (a) Name of disqualified person | (b) Relationship between disqualified person and organization | (c) Description of transaction | (d) Corrected? |    |
|-----|---------------------------------|---|--------------------------------|----------------|----|
|     |                                 |   |                                | Yes            | No |
| (1) |                                 |   |                                |                |    |
| (2) |                                 |   |                                |                |    |
| (3) |                                 |   |                                |                |    |
| (4) |                                 |   |                                |                |    |
| (5) |                                 |   |                                |                |    |
| (6) |                                 |   |                                |                |    |

2 Enter the amount of tax incurred by the organization managers or disqualified persons during the year under section 4958 \$ \_\_\_\_\_

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization \$ \_\_\_\_\_

**Part II Loans to and/or From Interested Persons.**

Complete if the organization answered "Yes" on Form 990-EZ, Part V, line 38a or Form 990, Part IV, line 26; or if the organization reported an amount on Form 990, Part X, line 5, 6, or 22.

| (a) Name of interested person | (b) Relationship with organization | (c) Purpose of loan | (d) Loan to or from the organization? |      | (e) Original principal amount | (f) Balance due | (g) In default? |    | (h) Approved by board or committee? |    | (i) Written agreement? |    |
|-------------------------------|------------------------------------|---------------------|---------------------------------------|------|-------------------------------|-----------------|-----------------|----|-------------------------------------|----|------------------------|----|
|                               |                                    |                     | To                                    | From |                               |                 | Yes             | No | Yes                                 | No | Yes                    | No |
| (1)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (2)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (3)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (4)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (5)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (6)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (7)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (8)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (9)                           |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| (10)                          |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
| <b>Total</b>                  |                                    |                     |                                       |      |                               | \$ _____        |                 |    |                                     |    |                        |    |

**Part III Grants or Assistance Benefiting Interested Persons.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

| (a) Name of interested person | (b) Relationship between interested person and the organization | (c) Amount of assistance | (d) Type of assistance | (e) Purpose of assistance |
|-------------------------------|---|--------------------------|------------------------|---------------------------|
| (1)                           |   |                          |                        |                           |
| (2)                           |   |                          |                        |                           |
| (3)                           |   |                          |                        |                           |
| (4)                           |   |                          |                        |                           |
| (5)                           |   |                          |                        |                           |
| (6)                           |   |                          |                        |                           |
| (7)                           |   |                          |                        |                           |
| (8)                           |   |                          |                        |                           |
| (9)                           |   |                          |                        |                           |
| (10)                          |   |                          |                        |                           |

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Cat. No. 50056A

Schedule L (Form 990) 2022





Part V

**Supplemental Information.** Provide additional information for responses to questions on Schedule L (see instructions).

| Return Reference - Identifier                                       | Explanation  |
|---|--|
| SCHEDULE L, PART IV,<br>COLUMN (B) -<br>CONFERENCE<br>CATALYSTS LLC | COMPANY IS 100% OWNED BY A FAMILY MEMBER OF DIVISION II DIRECTOR, RUTH DYER. |
| SCHEDULE L, PART IV,<br>COLUMN (B) - THOMAS M<br>CALLAN             | FAMILY MEMBER OF CURRENT KEY EMPLOYEE MARY WARD-CALLAN.                      |

**SCHEDULE M  
(Form 990)**

**Noncash Contributions**

OMB No. 1545-0047

**2022**

**Open to Public  
Inspection**

Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.  
Attach to Form 990.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Department of the Treasury  
Internal Revenue Service

Name of the organization  
**INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS, INC.**

Employer identification number  
**13-1656633**

**Part I Types of Property**

|    | (a)<br>Check if<br>applicable | (b)<br>Number of contributions or<br>items contributed | (c)<br>Noncash contribution<br>amounts reported on<br>Form 990, Part VIII, line 1g | (d)<br>Method of determining<br>noncash contribution amounts |
|----|-------------------------------|--|--|--|
| 1  |                               |  |  |  |
| 2  |                               |  |  |  |
| 3  |                               |  |  |  |
| 4  |                               |  |  |  |
| 5  |                               |  |  |  |
| 6  |                               |  |  |  |
| 7  |                               |  |  |  |
| 8  |                               |  |  |  |
| 9  |                               |  |  |  |
| 10 |                               |  |  |  |
| 11 |                               |  |  |  |
| 12 |                               |  |  |  |
| 13 |                               |  |  |  |
| 14 |                               |  |  |  |
| 15 |                               |  |  |  |
| 16 |                               |  |  |  |
| 17 |                               |  |  |  |
| 18 |                               |  |  |  |
| 19 |                               |  |  |  |
| 20 |                               |  |  |  |
| 21 |                               |  |  |  |
| 22 |                               |  |  |  |
| 23 |                               |  |  |  |
| 24 |                               |  |  |  |
| 25 | ✓                             | 1  | 30,128   | MARKET VALUE   |
| 26 |                               |  |  |  |
| 27 |                               |  |  |  |
| 28 |                               |  |  |  |

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part V, Donee Acknowledgement . . . . . **29** 1

|   | Yes | No |
|---|-----|----|
| 30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least 3 years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period? . . . . . |     | ✓  |
| b If "Yes," describe the arrangement in Part II.  |     |    |
| 31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions? . . . . .   |     | ✓  |
| 32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions? . . . . .  |     | ✓  |
| b If "Yes," describe in Part II.  |     |    |
| 33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.   |     |    |

**Part II**

**Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

| Return Reference - Identifier   | Explanation   |
|---|---|
| SCHEDULE M, PART I - EXPLANATIONS OF REPORTING METHOD FOR NUMBER OF CONTRIBUTIONS | OTHER - EQUIPMENT CONTRIBUTIONS RECEIVED BY IEEE ARE REPORTED BASED ON THE NUMBER OF CONTRIBUTIONS. |

**SCHEDULE O  
(Form 990)**

Department of Treasury Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

- ▶ Attach to Form 990 or 990-EZ.
- ▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2022**

Open to Public Inspection

Name of the Organization  
**INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS, INC.**

Employer Identification Number  
**13-1656633**

| Return Reference - Identifier                             | Explanation  |
|---|--|
| FORM 990, PART I, LINE 1 - BRIEF MISSION                  | <p>TECHNOLOGICAL INNOVATION AND EXCELLENCE FOR THE BENEFIT OF HUMANITY.</p> <p>IN 2022, IEEE CONTINUED TO REIMAGINE IEEE'S PROGRAMS IN ORDER TO IDENTIFY NEW AND BETTER WAYS TO TACKLE THE PROBLEMS FACING OUR WORLD, AND TO MEET THE DIVERSE NEEDS OF OUR MEMBERS. PROGRESS IN ENGINEERING, TECHNOLOGY AND SCIENCE IS A GLOBAL ENDEAVOR WITH WORLDWIDE IMPLICATIONS, GUIDED BEST BY A DIVERSE AND INCLUSIVE COMMUNITY OF ENGINEERS, TECHNOLOGISTS, RESEARCHERS, AND ENTREPRENEURS WITH A GOAL OF DEVELOPING AND SHARING INNOVATIVE SOLUTIONS FOR THE BENEFIT OF ALL. IEEE'S COMMITMENT TO SCIENTIFIC AND TECHNICAL DISCOVERY AND INNOVATION IMPROVES OUR STANDARDS OF LIVING AND HELPS US CARE FOR EACH OTHER AND FOR OUR PLANET.</p>   |
| FORM 990, PART III, LINE 1 - ORGANIZATION'S MISSION       | <p>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.</p>   |
| FORM 990, PART III, LINE 4A - PROGRAM SERVICE DESCRIPTION | <p>ACCESS AND SUBSCRIPTION-BASED CONTENT - AS "TRANSFORMATIVE JOURNALS" UNDER PLAN S. THIS CHANGE ALLOWS AUTHORS RECEIVING RESEARCH GRANTS FROM COALITION S FUNDERS TO BE COMPLIANT WITH PLAN S REQUIREMENTS WHEN PUBLISHING THEIR RESEARCH ARTICLES IN ANY IEEE FULLY OPEN ACCESS OR HYBRID JOURNALS. A "TRANSFORMATIVE JOURNAL" IS A SUBSCRIPTION/HYBRID JOURNAL THAT WILL TRANSITION TO BE FULLY OPEN ACCESS JOURNAL OVER TIME.</p> <p>IN 2022, IEEE CONTINUED EXPANDING ITS TRANSFORMATIVE READ AND PUBLISH OPEN ACCESS OFFERINGS BY SIGNING NEW UNLIMITED AGREEMENTS ALLOWING ARTICLES WRITTEN BY RESEARCHERS AT PARTICIPATING INSTITUTIONS TO BE FULLY ACCESSIBLE TO EVERYONE. IEEE SIGNED A FOUR-YEAR AGREEMENT WITH THE 10 CAMPUSES WITHIN THE UNIVERSITY OF CALIFORNIA SYSTEM, AND A THREE-YEAR AGREEMENT WITH CONFERENZA DEI RETTORI DELLE UNIVERSITÀ ITALIANE, AN ASSOCIATION OF 54 STATE AND NON-STATE ITALIAN UNIVERSITIES, TO PUBLISH OPEN ACCESS ARTICLES IN IEEE'S 200 JOURNALS AND MAGAZINES. PLEASE VISIT <a href="http://OPEN.IEEE.ORG/FOR-INSTITUTIONS/INSTITUTIONAL-PARTNERS">OPEN.IEEE.ORG/FOR-INSTITUTIONS/INSTITUTIONAL-PARTNERS</a> FOR A COMPLETE LIST OF PARTICIPATING UNIVERSITIES.</p> <p>IEEE MAINTAINS ITS POSITION AS ONE OF THE TOP PUBLISHERS OF SCIENCE AND TECHNOLOGY JOURNALS, CONTINUING TO BE A TRUSTED SOURCE FOR COMMUNICATING QUALITY TECHNICAL INFORMATION THAT WILL HELP INSPIRE AND SHARE THE NEXT BREAKTHROUGH TECHNOLOGIES.</p> |
| FORM 990, PART III, LINE 4B - PROGRAM SERVICE DESCRIPTION | <p>NEXT GENERATION FARM ROBOTS.</p> <p>OVER 9,800 ENERGY PROFESSIONALS FROM AROUND THE WORLD ATTENDED THE 2022 IEEE POWER &amp; ENERGY SOCIETY TRANSMISSION AND DISTRIBUTION CONFERENCE AND EXPOSITION IN NEW ORLEANS, LA, TO HEAR INSIGHTS FROM THE BEST MINDS IN POWER AND ENERGY, AND TO HELP SHAPE THE FUTURE DESIGN AND DEVELOPMENT OF A RELIABLE, RESILIENT GRID.</p> <p>THE IEEE-ETA KAPPA NU (IEEE-HKN) STUDENT LEADERSHIP CONFERENCE RETURNED IN 2022 WITH RECORD ATTENDANCE. STUDENTS FROM 54 CHAPTERS AND FIVE DIFFERENT COUNTRIES PARTICIPATED IN THE IN-PERSON EVENT IN CHARLOTTE, NC.</p>  |

| Return Reference - Identifier                                    | Explanation  |
|--|--|
| <p>FORM 990, PART III, LINE 4C - PROGRAM SERVICE DESCRIPTION</p> | <p>IMPROVING STANDARDS OF LIVING AND HELPS US CARE FOR EACH OTHER AND FOR OUR PLANET. IN 2022 IEEE BEGAN TO DEVELOP A CROSS-IEEE STRATEGY TO SYNCHRONIZE AND GUIDE IEEE'S RESPONSE TO CHANGES IN THE GLOBAL CLIMATE, EXPAND ITS DIVERSE MEMBERSHIP, AND TO ENGAGE THE NEXT GENERATION OF STUDENTS AND YOUNG PROFESSIONALS, TO EFFECTIVELY WORK TOGETHER TOWARDS A MORE CONNECTED, INNOVATIVE FUTURE FOR THE GREATER GLOBAL PUBLIC GOOD. AROUND THE WORLD, IEEE MEMBERS AND VOLUNTEERS DONATED THEIR TIME AND EXPERTISE TO BUILD ON THIS STRATEGY THROUGH THE FOLLOWING PROGRAMS:</p> <p>A)YOUR PROFESSIONAL HOME: THE YOUR PROFESSIONAL HOME CAMPAIGN HIGHLIGHTED HOW THE IEEE COMMUNITY HELPS MEMBERS AND VOLUNTEERS LEARN, SHARE, TEACH AND NETWORK. PROFESSIONALS FROM DIFFERENT INDUSTRIES AND BACKGROUNDS SHARED PERSONAL EXPERIENCES AND DISCUSSED WHY IEEE IS THEIR PROFESSIONAL HOME.</p> <p>B)EDUCATION WEEK: IEEE MEMBERS AROUND THE WORLD CELEBRATED THE INAUGURAL IEEE EDUCATION WEEK. IEEE EDUCATION WEEK BROUGHT ATTENTION TO THE DIVERSE EDUCATIONAL OPPORTUNITIES AVAILABLE THROUGHOUT IEEE TO ADVANCE TECHNICAL CAREERS AND SOCIETY BY EXTENSION.</p> <p>C)CLIMATE CHANGE EFFORTS: IEEE LAUNCHED THE IEEE CLIMATE CHANGE WEBSITE, DEDICATED TO HIGHLIGHTING VARIOUS EFFORTS AROUND THE ORGANIZATION AND CREATED THE IEEE CLIMATE CHANGE COLLECTION, A REPOSITORY OF OVER 7,000 ARTICLES FROM THE IEEE XPLORE DIGITAL LIBRARY ABOUT THE CAUSES AND SOLUTIONS FOR CLIMATE CHANGE. IEEE TECHNICAL ACTIVITIES COLLABORATED WITH VOLUNTEERS IN 40 DIFFERENT IEEE SOCIETIES TO CONTRIBUTE TO FOUR MAJOR CLIMATE CHANGE INITIATIVES: WILDFIRE PREVENTION AND MITIGATION, MANAGEMENT OF FOOD AND WATER SUPPLIES, WORKFORCE DEVELOPMENT, AND SUSTAINABLE TECHNOLOGIES, INCLUDING E-WASTE MANAGEMENT.</p> <p>D)STUDENT TEAMS TACKLE ENVIRONMENTAL SUSTAINABILITY CHALLENGES: IEEE STUDENT TEAMS FROM ACROSS THE UNITED STATES TACKLED SUSTAINABILITY CHALLENGES IN THE EPICS IN IEEE ENVIRONMENTAL COMPETITION. STUDENT PROJECTS RANGED FROM A ROBOT THAT COLLECTS LITTER FROM A LOCAL LAKE TO NITROGEN-SENSING DRONES FOR UNDERSTANDING AIR QUALITY.</p> <p>E)EMERGING TECHNOLOGIES: IEEE FUTURE DIRECTIONS PROVIDED PERSPECTIVES ON TWO NEW TECHNOLOGY AREAS: IEEE PUBLIC SAFETY TECHNOLOGY, EXPLORING HOW NEW TECHNOLOGIES ENHANCE THE EFFECTIVENESS OF PUBLIC SAFETY PERSONNEL AND PROMOTE THEIR WELL-BEING, AND IEEE DIGITAL PRIVACY ADVOCATING FOR THE PROTECTION OF DIGITAL PRIVACY FOR INDIVIDUALS.</p> <p>F)IEEE-USA HELPS SHAPE PUBLIC POLICY: IEEE PROVIDED INPUT ON TWO SIGNIFICANT PIECES OF LEGISLATION RELATED TO US TECHNOLOGICAL INVESTMENT: 1) THE CHIPS AND SCIENCE ACT, WHICH AIMS TO STRENGTHEN THE DOMESTIC SEMICONDUCTOR INDUSTRY AND BOOST TECHNOLOGICAL INNOVATION, RESEARCH AND DEVELOPMENT; AND WORKFORCE EDUCATION INITIATIVES. 2) AI BILL OF RIGHTS - IEEE PARTICIPATED IN SEVERAL SESSIONS RELATED TO THE DEVELOPMENT OF THE PROPOSED "BLUEPRINT" AI BILL OF RIGHTS, DEVELOPED BY THE WHITE HOUSE OFFICE OF SCIENCE AND TECHNOLOGY POLICY. THE AI BILL OF RIGHTS OUTLINES FIVE KEY PRINCIPLES AND CORRESPONDING PRACTICES THAT ARE INTENDED TO GUIDE THE DESIGN, USE, AND DEPLOYMENT OF AUTOMATED SYSTEMS BY GOVERNMENT AGENCIES IN A WAY THAT PROTECTS THE RIGHTS OF THE AMERICAN PUBLIC.</p> <p>G)IEEE DIVERSITY AND INCLUSION COMMITTEE: THE IEEE DIVERSITY AND INCLUSION COMMITTEE'S INAUGURAL YEAR FOCUSED ON BUILDING A FRAMEWORK TO SUPPORT THE IEEE DIVERSITY STATEMENT AND FORTIFYING ONGOING AND NEW INITIATIVES TOWARD GREATER DIVERSITY, EQUITY, AND INCLUSION. IEEE EXPANDED ITS DIVERSITY AND INCLUSION WEB PRESENCE, ESTABLISHED OUTREACH AND COMMUNICATION CHANNELS TO SUPPORT IEEE ORGANIZATIONAL UNITS, AND PUBLISHED THE IEEE DIVERSITY REPORT TO INCREASE AWARENESS OF THE COMMITTEE'S ACTIVITIES AND GENERATE IDEAS FOR FUTURE EFFORTS.</p> <p>H)IEEE WOMEN IN ENGINEERING - 25TH ANNIVERSARY: IEEE WOMEN IN ENGINEERING (WIE) FACILITATES THE RECRUITMENT AND RETENTION OF WOMEN IN TECHNICAL DISCIPLINES AROUND THE WORLD AND WORKS TO INSPIRE GIRLS TO PURSUE A CAREER IN ENGINEERING. WIE KICKED OFF ITS 25TH ANNIVERSARY WITH A VIRTUAL PANEL THAT FEATURED PAST WIE CHAIRS EXPLAINING WHY THEY JOINED THE GROUP AND SHARED THEIR EXPERIENCES, AND ON INTERNATIONAL WOMEN'S DAY IN MARCH, WIE HELD A 12-HOUR VIRTUAL MARATHON SHOWCASING EACH IEEE REGION'S DIVERSITY AND INCLUSION EFFORTS. YEAR-LONG CELEBRATIONS HIGHLIGHTED THE AMAZING PROGRESS AND ACHIEVEMENTS MADE BY GREAT WOMEN IN STEM.</p> <p>IEEE IS PROUD TO ENGAGE AND COLLABORATE WITH GLOBAL COMMUNITIES TO HELP MAKE OUR WORLD A MORE SUSTAINABLE, HUMANE, AND PROSPEROUS PLACE. SOME OF 2022 KEY PROGRAMS INCLUDE:</p> <p>1)CLIMATE CHANGE EFFORTS: IEEE SENT A DELEGATION TO THE UNITED NATIONS CLIMATE CHANGE CONFERENCE (COP27) IN SHARM EL-SHEIKH, EGYPT. THE DELEGATION PRESENTED TECHNOLOGY SOLUTIONS TO ADDRESS CLIMATE CHANGE MITIGATION AND ADAPTATION IN THE PURSUIT OF AN EQUITABLE, SUSTAINABLE, AND CLIMATE-RESILIENT FUTURE.</p> <p>2)IEEE WIE LEADERSHIP SUMMIT - DIVERSITY, INCLUSION, BREAKING BOUNDARIES: THE 2022 IEEE WOMEN IN ENGINEERING (WIE) BEIJING LEADERSHIP SUMMIT CO-HOSTED BY THE IEEE WIE BEIJING AFFINITY GROUP AND BEIJING WOMEN'S ASSOCIATION FOR SCIENCE AND TECHNOLOGY, FOCUSED ON THE DEVELOPMENT OF WOMEN IN THE FIELDS OF SCIENCE AND TECHNOLOGY INCLUDING THE METAVERSE, CHIP ECOLOGY, POWER AND ENERGY AND SMART CITIES.</p> <p>3)HUMANITARIAN EFFORTS WORLDWIDE: THE IEEE HUMANITARIAN ACTIVITIES COMMITTEE (HAC) AND SPECIAL INTEREST GROUP ON HUMANITARIAN TECHNOLOGY (SIGHT) FUNDED AND IMPLEMENTED NUMEROUS LIFE-CHANGING PROGRAMS. NOTABLE PROJECTS INCLUDE:</p> <p>A) IEEE ECUADOR SECTION REHABILITATED A DATA NETWORK FOR 60 LOCAL SCHOOLS OVER THE COURSE OF THREE YEARS, PROVIDING INTERNET ACCESS TO 4,500 STUDENTS. THE TEAM ALSO IMPLEMENTED A STEM TRAINING PROGRAM FOR OVER 400 STUDENTS AND PROVIDED BASIC</p> |

| Return Reference - Identifier  | Explanation   |
|--|---|
|  | <p>TRAINING FOR SCHOOLS TO MAINTAIN THEIR INTERNET NETWORKS.</p> <p>B) IEEE INDONESIA SECTION PROVIDED AN ON-GRID ROOFTOP PHOTOVOLTAIC POWER PLANT FOR THE DISABLED CHILDREN CARE HOME IN JAKARTA. THE PROJECT HELPED TO REDUCE OVERHEAD EXPENSES FOR THE HOME AND ENABLED IT TO USE THE EXTRA FUNDS TO BENEFIT THE CHILDREN.</p> <p>C) IEEE MALAYSIA SECTION IMPLEMENTED A RENEWABLE ENERGY HYDROPONIC AGRICULTURAL SYSTEM IN A LOW-RESOURCE URBAN COMMUNITY. RESIDENTS LEARNED ABOUT SMART AGRICULTURE TECHNIQUES AND WERE ABLE TO CONSUME AND SELL THE CROPS PRODUCED VIA THE SYSTEM.</p> <p>D) IEEE UGANDA SECTION RENOVATED A SOLAR POWER SYSTEM AT A COMMUNITY SCHOOL THAT HAD FALLEN INTO DISREPAIR DUE TO A LACK OF MAINTENANCE. THE SCHOOL'S 400 STUDENTS NOW BENEFIT FROM LIGHTED CLASSROOMS AND DORMITORIES WITH POWER.</p>  |
| <p>FORM 990, PART III, LINE 4D - DESCRIPTION OF OTHER PROGRAM SERVICES</p>                     | <p>(EXPENSES \$44,422,587 INCLUDING GRANTS OF \$0)(REVENUE \$43,373,783)</p> <p>STANDARDS AND OTHER IEEE PROGRAMS:<br/>THE IEEE STANDARDS ASSOCIATION (SA) APPROVED 126 NEW STANDARDS IN 2022 FOR PUBLICATION. SOME OF THE KEY INITIATIVES AND ACCOMPLISHMENTS INCLUDE:</p> <p>IEEE'S OPEN GLOBAL STANDARDIZATION APPROACH PRIORITIZES INCLUDING NEW PARTICIPANTS AND COMMUNITIES TO ADDRESS RAPIDLY CHANGING TECHNOLOGY AND MARKET DYNAMICS. 2022 SAW A SIGNIFICANT INCREASE IN PARTICIPATION, WITH NOW OVER 8,000 INDIVIDUAL MEMBERS FROM 98 COUNTRIES, AND OVER 430 ENTITY MEMBERS FROM 25 COUNTRIES. IEEE SA MEMBERS PARTICIPATED IN NEW WORKING GROUPS IN CHINA, AND ON SEVERAL NEW STANDARDS PROJECTS IN CYBERSECURITY, SUSTAINABILITY, AND MOBILITY, AND SMART TRANSPORTATION.</p> <p>THE NATIONAL ELECTRICAL SAFETY CODE (NESC), WHICH SPECIFIES BEST PRACTICES FOR THE SAFETY OF ELECTRIC SUPPLY AND COMMUNICATION UTILITY SYSTEMS, IS TYPICALLY UPDATED EVERY FIVE YEARS TO STAY CURRENT WITH CHANGES IN INDUSTRY AND TECHNOLOGY. THE NES SETS THE GROUND RULES AND GUIDELINES FOR PRACTICAL SAFEGUARDING OF WORKERS AND THE PUBLIC DURING THE INSTALLATION, OPERATION, OR MAINTENANCE OF POWER, TELEPHONE, CABLE TV AND RAILROAD SIGNAL SYSTEMS. THE 2023 HANDBOOK, PUBLISHED IN 2022, ADDRESSES EMERGING TECHNOLOGIES SUCH AS SOLAR AND WIND ENERGY, DISTRIBUTED ENERGY/MICROGRIDS, BATTERIES AND ENERGY STORAGE, AND WIRELESS SMALL CELL NETWORKS. SEVEN E-LEARNING COURSES WERE ALSO LAUNCHED TO HELP COMMUNICATE THE LATEST CHANGES.</p> <p>IEEE STANDARDS ASSOCIATION COLLABORATED WITH THE EUROPEAN COMMISSION DISCUSSING THE RELEVANCE AND APPLICABILITY OF IEEE STANDARDS AND STANDARDS-RELATED ACTIVITIES IN SUPPORT OF REGULATING AI. IEEE HAS BEEN ACTIVE IN IDENTIFYING AREAS WHERE IEEE STANDARDS CAN PLAY A CRITICAL ROLE IN SUPPORTING THE DEVELOPMENT AND IMPLEMENTATION OF AI REGULATIONS, INCLUDING THE PENDING EUROPEAN UNION AI ACT. IEEE WAS RECOGNIZED AS A VALUABLE CONTRIBUTOR IN THIS PROCESS, ENSURING THAT AI IS DEVELOPED AND USED IN A RESPONSIBLE AND ETHICAL MANNER.</p> <p>IEEEEXTREME, A GLOBAL CHALLENGE IN WHICH THOUSANDS OF TEAMS OF IEEE STUDENT MEMBERS COMPETE IN A 24-HOUR TIME SPAN TO SOLVE A SET OF REAL-WORLD PROGRAMMING PROBLEMS, CONTINUES TO BE POPULAR WITH THE NEXT GENERATION OF TECHNOLOGISTS. IEEEEXTREME 16.0 WAS THE LARGEST IN ITS HISTORY WITH A 15% ANNUAL PARTICIPATION INCREASE: 14,694 PARTICIPANTS COMPRISED 6,377 TEAMS COMPETED IN THIS YEAR'S COMPETITION.</p> <p>IEEE'S MOBILE OUTREACH VEHICLE (MOVE) CONTINUES ITS MISSION TO ASSIST VICTIMS OF NATURAL DISASTERS, WHERE VOLUNTEERS PROVIDED CRITICAL COMMUNICATIONS INFRASTRUCTURE AND SUPPORT TO FEDERAL RESOURCE CENTERS AND TO AMERICAN RED CROSS RESPONDERS WORKING IN IMPACTED COMMUNITIES. IN 2022, MOVE RESPONDED TO THREE DISASTER EVENTS IN THE UNITED STATES - FLOODING IN KENTUCKY, WILDFIRES IN CALIFORNIA, AND HURRICANE IAN IN FLORIDA.</p> <p>IEEE ALSO INITIATED MOVE INTERNATIONAL, ITS GLOBAL EXPANSION INTO INDIA AND PUERTO RICO. SO FAR, THE GLOBAL PROGRAM HAS HOSTED DISASTER AWARENESS TRAINING WORKSHOPS FOR IEEE VOLUNTEERS AND STUDENTS AND DEVELOPED A MODULAR MODEL RESPONSE UNIT IN PUERTO RICO UTILIZING SOLAR POWERED GENERATORS AND RADIO SETS IN TRANSPORTABLE CASES TO COMBAT TRANSPORTATION CHALLENGES DURING DISASTER EVENTS.</p> |
| <p>FORM 990, PART VI, LINE 4 - SIGNIFICANT CHANGES TO ORGANIZATIONAL DOCUMENTS</p>             | <p>THE MEMBER-INITIATED CONSTITUTIONAL AMENDMENT PETITION PROCESS IN THE IEEE CONSTITUTION WAS AMENDED TO REQUIRE BOTH A MINIMUM NUMBER OF VOTING MEMBERS PER REGION AND IN TOTAL, FOR FUTURE MEMBER PETITION CONSTITUTIONAL AMENDMENTS.</p>  |
| <p>FORM 990, PART VI, LINE 6 - CLASSES OF MEMBERS OR STOCKHOLDERS</p>                          | <p>IEEE HAS A TOTAL OF 427,780 MEMBERS IN OVER 190 COUNTRIES AROUND THE WORLD.</p>  |
| <p>FORM 990, PART VI, LINE 7A - MEMBERS OR STOCKHOLDERS ELECTING MEMBERS OF GOVERNING BODY</p> | <p>VOTING MEMBERS OF IEEE ELECT THE DIRECTORS OF IEEE. VOTING MEMBERS ARE THOSE MEMBERS OF MEMBER GRADE OR ABOVE, INCLUDING GRADUATE STUDENT MEMBERS, AS DEFINED IN THE BYLAWS.</p>   |
| <p>FORM 990, PART VI, LINE 7B - DECISIONS REQUIRING APPROVAL BY MEMBERS OR STOCKHOLDERS</p>    | <p>AMENDMENTS TO THE CONSTITUTION ARE SUBJECT TO APPROVAL BY THE VOTING MEMBERS OF THE ORGANIZATION. VOTING MEMBERS ARE THOSE MEMBERS OF MEMBER GRADE OR ABOVE, INCLUDING GRADUATE STUDENT MEMBERS, AS DEFINED IN THE BYLAWS.</p>   |

| Return Reference - Identifier  | Explanation   |                              |                                     |                              |                                     |                          |                             |            |            |         |        |                                |           |           |       |        |                     |            |            |   |   |                            |            |            |        |        |                               |           |           |   |   |                      |           |           |        |   |              |                   |                   |                |                |
|--|---|------------------------------|-------------------------------------|------------------------------|-------------------------------------|--------------------------|-----------------------------|------------|------------|---------|--------|--------------------------------|-----------|-----------|-------|--------|---------------------|------------|------------|---|---|----------------------------|------------|------------|--------|--------|-------------------------------|-----------|-----------|---|---|----------------------|-----------|-----------|--------|---|--------------|-------------------|-------------------|----------------|----------------|
| FORM 990, PART VI, LINE 11B - REVIEW OF FORM 990 BY GOVERNING BODY                             | IEEE HAS AN EXTENSIVE REVIEW PROCESS THAT IS COMPLETED BEFORE THE FORM 990 IS FILED WITH THE IRS. THE RETURN IS FIRST REVIEWED BY THE EXECUTIVE DIRECTOR, PAST PRESIDENT, TREASURER, PAST TREASURER, AND THE CFO/ASSISTANT TREASURER, BEFORE BEING PRESENTED TO THE AUDIT COMMITTEE, WHICH CONSISTS OF MEMBERS OF THE IEEE BOARD OF DIRECTORS. THE RETURN IS POSTED TO THE IEEE BOARD OF DIRECTORS SECURE PORTAL FOR BOARD MEMBERS TO REVIEW PRIOR TO FILING WITH THE IRS.  |                              |                                     |                              |                                     |                          |                             |            |            |         |        |                                |           |           |       |        |                     |            |            |   |   |                            |            |            |        |        |                               |           |           |   |   |                      |           |           |        |   |              |                   |                   |                |                |
| FORM 990, PART VI, LINE 12C - CONFLICT OF INTEREST POLICY                                      | IEEE REQUIRES THAT OFFICERS AND DIRECTORS SUBMIT CONFLICT OF INTEREST DISCLOSURE FORMS WHICH ARE REVIEWED FOR POTENTIAL CONFLICT OF INTEREST. ALL IEEE EMPLOYEES ARE REQUIRED TO COMPLETE CONFLICTS OF INTEREST TRAINING AND THOSE WITH AUTHORITY TO MAKE FINANCIAL EXPENDITURES ARE REQUIRED TO SUBMIT A DISCLOSURE FORM. AN OFFICER OR DIRECTOR WHO DOES NOT COMPLETE THE REQUIRED CONFLICT OF INTEREST DISCLOSURE FORM IS REMOVED FROM SERVICE ON THE COMMITTEE OR BOARD.  |                              |                                     |                              |                                     |                          |                             |            |            |         |        |                                |           |           |       |        |                     |            |            |   |   |                            |            |            |        |        |                               |           |           |   |   |                      |           |           |        |   |              |                   |                   |                |                |
| FORM 990, PART VI, LINE 15A - PROCESS TO ESTABLISH COMPENSATION OF TOP MANAGEMENT OFFICIAL     | <p>THE IEEE BOARD OF DIRECTORS ENGAGED AN INDEPENDENT COMPENSATION CONSULTANT TO PROVIDE IEEE WITH MARKET COMPARABILITY DATA AND A REASONABLENESS RECOMMENDATION WITH RESPECT TO COMPENSATION PAID TO DISQUALIFIED PERSONS AS DEFINED UNDER SECTION 4958 OF THE INTERNAL REVENUE CODE OF 1986, TO ENABLE IEEE TO ESTABLISH A REBUTTABLE PRESUMPTION OF REASONABLENESS UNDER SECTION 4958.</p> <p>A COMMITTEE CONSISTING OF THE IEEE PRESIDENT, THE IEEE PAST PRESIDENT, AND THE IEEE PRESIDENT-ELECT (THE EXECUTIVE PERFORMANCE AND COMPENSATION COMMITTEE OR EPCC), ADVISED BY EXTERNAL LEGAL COUNSEL, IS CHARGED WITH EVALUATING THE TOTAL COMPENSATION PACKAGE OF THE IEEE EXECUTIVE DIRECTOR, WHO SERVES AS THE CHIEF OPERATIONS OFFICER ("ED &amp; COO"), AND A COMMITTEE OF INDEPENDENT BOARD MEMBERS AND NON-BOARD MEMBERS (THE IEEE EMPLOYEE BENEFITS &amp; COMPENSATION COMMITTEE OR EBCC), ADVISED BY EXTERNAL LEGAL COUNSEL, IS CHARGED WITH EVALUATING THE TOTAL COMPENSATION PACKAGE OF OTHER OFFICERS AND KEY EMPLOYEES, INCLUDING THE CHIEF FINANCIAL OFFICER, STAFF EXECUTIVE, MANAGING DIRECTORS, CHIEF INFORMATION OFFICER, CHIEF MARKETING OFFICER, GENERAL COUNSEL AND CHIEF COMPLIANCE OFFICER.</p> <p>THE INDEPENDENT COMPENSATION CONSULTANT PROVIDED THESE COMMITTEES WITH MARKET DATA FROM PUBLISHED SOURCES FOR COMPARABLE POSITIONS FROM BOTH TAX-EXEMPT AND FOR-PROFIT ORGANIZATIONS. THE ASSESSMENT WAS CONDUCTED AT THE TOTAL REWARDS LEVEL AND INCLUDED ALL COMPENSATION COMPONENTS. FOR THE EPCC REVIEW OF THE EXECUTIVE DIRECTOR, EXTERNAL MARKET COMPARISONS WERE BASED ON TWO PRIMARY SOURCES OF DATA, WEIGHTED EQUALLY: (1) FORM 990 FILINGS FOR A GROUP OF PEER ORGANIZATIONS IDENTIFIED BY INDEPENDENT COMPENSATION CONSULTANT BASED ON VARIOUS CRITERIA AND (2) PUBLISHED SURVEYS; SCOPE CUTS INCLUDING INDUSTRY, FTES AND REVENUE WERE SELECTED THAT REPRESENTED ORGANIZATIONS COMPARABLE TO IEEE. THE FOLLOWING SCREENING CRITERIA WERE USED TO IDENTIFY AND SELECT COMPARABLE ORGANIZATIONS: (1) NTEE CODE: (A) GENERAL SCIENCE INSTITUTIONS, (B) ENGINEERING AND TECHNOLOGY SERVICES, (C) PROFESSIONAL SOCIETY, AND (D) RESEARCH INSTITUTIONS; (2) INCOME AND ASSETS; AND (3) EMPLOYEE SIZE.</p> <p>ONCE ORGANIZATIONS WERE SCREENED USING THESE CRITERIA, THE FOLLOWING INFORMATION WAS COLLECTED: (I) WHETHER THE ORGANIZATION HAS INTERNATIONAL PRESENCE, (II) WHETHER THEY ARE A STANDARD-SETTING ORGANIZATION; (III) WHETHER THEY HAVE A SIGNIFICANT PUBLISHING ACTIVITY; AND (IV) THE EXTENT OF ITS FOCUS ON CONTRACT RESEARCH. THE EBCC RELIES ON SURVEY DATA AND DOES NOT CONSIDER FORM 990 DATA AS PART OF THEIR METHODOLOGY AND REVIEW.</p> <p>THE TWO COMMITTEES REVIEW INDIVIDUAL AND MARKET DATA AND DEBATE AND DOCUMENT THEIR DECISIONS ABOUT WHAT IS REASONABLE AND THE DECISION-MAKING PROCESSES. THE INDEPENDENT COMPENSATION CONSULTANT PROVIDED A "PRESUMPTION OF REASONABLE COMPENSATION" OPINION LETTER FOR THE IEEE FILES.</p> |                              |                                     |                              |                                     |                          |                             |            |            |         |        |                                |           |           |       |        |                     |            |            |   |   |                            |            |            |        |        |                               |           |           |   |   |                      |           |           |        |   |              |                   |                   |                |                |
| FORM 990, PART VI, LINE 17 - STATES WITH WHICH A COPY OF THIS FORM 990 IS REQUIRED TO BE FILED | CO, CT, FL, GA, HI, IL, IN, KS, KY, MA, MD, ME, MI, MN, MS, NC, ND, NH, NJ, NM, NV, NY, OH, OK, OR, PA, RI, SC, TN, UT, VA, WA, WI, WV  |                              |                                     |                              |                                     |                          |                             |            |            |         |        |                                |           |           |       |        |                     |            |            |   |   |                            |            |            |        |        |                               |           |           |   |   |                      |           |           |        |   |              |                   |                   |                |                |
| FORM 990, PART VI, LINE 19 - REQUIRED DOCUMENTS AVAILABLE TO THE PUBLIC                        | THE IEEE GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND FINANCIAL STATEMENTS ARE AVAILABLE ON THE IEEE WEBSITE AND TO THE PUBLIC UPON REQUEST.   |                              |                                     |                              |                                     |                          |                             |            |            |         |        |                                |           |           |       |        |                     |            |            |   |   |                            |            |            |        |        |                               |           |           |   |   |                      |           |           |        |   |              |                   |                   |                |                |
| FORM 990, PART IX, LINE 11G - OTHER FEES FOR SERVICES  | <table border="1"> <thead> <tr> <th data-bbox="467 1566 751 1640">(a) Description</th> <th data-bbox="760 1566 946 1640">(b) Total Expenses</th> <th data-bbox="954 1566 1133 1640">(c) Program Service Expenses</th> <th data-bbox="1141 1566 1320 1640">(d) Management and General Expenses</th> <th data-bbox="1328 1566 1513 1640">(e) Fundraising Expenses</th> </tr> </thead> <tbody> <tr> <td data-bbox="467 1650 751 1692">CONSULTANTS (PROGRAMS, G&amp;A)</td> <td data-bbox="760 1650 946 1692">18,234,881</td> <td data-bbox="954 1650 1133 1692">17,852,124</td> <td data-bbox="1141 1650 1320 1692">335,600</td> <td data-bbox="1328 1650 1513 1692">47,157</td> </tr> <tr> <td data-bbox="467 1703 751 1745">CONSULTANTS (PROGRAMS, EVENTS)</td> <td data-bbox="760 1703 946 1745">4,758,446</td> <td data-bbox="954 1703 1133 1745">4,706,327</td> <td data-bbox="1141 1703 1320 1745">1,498</td> <td data-bbox="1328 1703 1513 1745">50,621</td> </tr> <tr> <td data-bbox="467 1755 751 1787">MANAGEMENT SERVICES</td> <td data-bbox="760 1755 946 1787">10,747,436</td> <td data-bbox="954 1755 1133 1787">10,747,436</td> <td data-bbox="1141 1755 1320 1787">0</td> <td data-bbox="1328 1755 1513 1787">0</td> </tr> <tr> <td data-bbox="467 1797 751 1839">TEMPORARY AGENCY PERSONNEL</td> <td data-bbox="760 1797 946 1839">11,857,855</td> <td data-bbox="954 1797 1133 1839">11,796,891</td> <td data-bbox="1141 1797 1320 1839">46,621</td> <td data-bbox="1328 1797 1513 1839">14,343</td> </tr> <tr> <td data-bbox="467 1850 751 1892">INTERCOMPANY SERVICES EXPENSE</td> <td data-bbox="760 1850 946 1892">7,480,063</td> <td data-bbox="954 1850 1133 1892">7,480,063</td> <td data-bbox="1141 1850 1320 1892">0</td> <td data-bbox="1328 1850 1513 1892">0</td> </tr> <tr> <td data-bbox="467 1902 751 1934">RECRUITMENT SERVICES</td> <td data-bbox="760 1902 946 1934">1,040,892</td> <td data-bbox="954 1902 1133 1934">1,003,428</td> <td data-bbox="1141 1902 1320 1934">37,464</td> <td data-bbox="1328 1902 1513 1934">0</td> </tr> <tr> <td data-bbox="467 1944 751 1955"><b>Total</b></td> <td data-bbox="760 1944 946 1955"><b>54,119,573</b></td> <td data-bbox="954 1944 1133 1955"><b>53,586,269</b></td> <td data-bbox="1141 1944 1320 1955"><b>421,183</b></td> <td data-bbox="1328 1944 1513 1955"><b>112,121</b></td> </tr> </tbody> </table>   | (a) Description              | (b) Total Expenses                  | (c) Program Service Expenses | (d) Management and General Expenses | (e) Fundraising Expenses | CONSULTANTS (PROGRAMS, G&A) | 18,234,881 | 17,852,124 | 335,600 | 47,157 | CONSULTANTS (PROGRAMS, EVENTS) | 4,758,446 | 4,706,327 | 1,498 | 50,621 | MANAGEMENT SERVICES | 10,747,436 | 10,747,436 | 0 | 0 | TEMPORARY AGENCY PERSONNEL | 11,857,855 | 11,796,891 | 46,621 | 14,343 | INTERCOMPANY SERVICES EXPENSE | 7,480,063 | 7,480,063 | 0 | 0 | RECRUITMENT SERVICES | 1,040,892 | 1,003,428 | 37,464 | 0 | <b>Total</b> | <b>54,119,573</b> | <b>53,586,269</b> | <b>421,183</b> | <b>112,121</b> |
| (a) Description  | (b) Total Expenses  | (c) Program Service Expenses | (d) Management and General Expenses | (e) Fundraising Expenses     |                                     |                          |                             |            |            |         |        |                                |           |           |       |        |                     |            |            |   |   |                            |            |            |        |        |                               |           |           |   |   |                      |           |           |        |   |              |                   |                   |                |                |
| CONSULTANTS (PROGRAMS, G&A)  | 18,234,881  | 17,852,124                   | 335,600                             | 47,157                       |                                     |                          |                             |            |            |         |        |                                |           |           |       |        |                     |            |            |   |   |                            |            |            |        |        |                               |           |           |   |   |                      |           |           |        |   |              |                   |                   |                |                |
| CONSULTANTS (PROGRAMS, EVENTS)   | 4,758,446   | 4,706,327                    | 1,498                               | 50,621                       |                                     |                          |                             |            |            |         |        |                                |           |           |       |        |                     |            |            |   |   |                            |            |            |        |        |                               |           |           |   |   |                      |           |           |        |   |              |                   |                   |                |                |
| MANAGEMENT SERVICES  | 10,747,436  | 10,747,436                   | 0                                   | 0                            |                                     |                          |                             |            |            |         |        |                                |           |           |       |        |                     |            |            |   |   |                            |            |            |        |        |                               |           |           |   |   |                      |           |           |        |   |              |                   |                   |                |                |
| TEMPORARY AGENCY PERSONNEL   | 11,857,855  | 11,796,891                   | 46,621                              | 14,343                       |                                     |                          |                             |            |            |         |        |                                |           |           |       |        |                     |            |            |   |   |                            |            |            |        |        |                               |           |           |   |   |                      |           |           |        |   |              |                   |                   |                |                |
| INTERCOMPANY SERVICES EXPENSE  | 7,480,063   | 7,480,063                    | 0                                   | 0                            |                                     |                          |                             |            |            |         |        |                                |           |           |       |        |                     |            |            |   |   |                            |            |            |        |        |                               |           |           |   |   |                      |           |           |        |   |              |                   |                   |                |                |
| RECRUITMENT SERVICES   | 1,040,892   | 1,003,428                    | 37,464                              | 0                            |                                     |                          |                             |            |            |         |        |                                |           |           |       |        |                     |            |            |   |   |                            |            |            |        |        |                               |           |           |   |   |                      |           |           |        |   |              |                   |                   |                |                |
| <b>Total</b>   | <b>54,119,573</b>   | <b>53,586,269</b>            | <b>421,183</b>                      | <b>112,121</b>               |                                     |                          |                             |            |            |         |        |                                |           |           |       |        |                     |            |            |   |   |                            |            |            |        |        |                               |           |           |   |   |                      |           |           |        |   |              |                   |                   |                |                |



| Return Reference - Identifier  | Explanation        |            |
|--|--------------------|------------|
| FORM 990, PART XI, LINE 9 -<br>OTHER CHANGES IN NET<br>ASSETS OR FUND BALANCES | (a) Description    | (b) Amount |
|  | PENSION ADJUSTMENT | 4,760,950  |

**SCHEDULE R  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Related Organizations and Unrelated Partnerships**

Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.  
Attach to Form 990.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2022**

**Open to Public Inspection**

Name of the organization

INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS, INC.

Employer identification number

13-1656633

**Part I Identification of Disregarded Entities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

| (a)<br>Name, address, and EIN (if applicable) of disregarded entity                                 | (b)<br>Primary activity                        | (c)<br>Legal domicile (state or foreign country) | (d)<br>Total income | (e)<br>End-of-year assets | (f)<br>Direct controlling entity                               |
|---|--|--|---------------------|---------------------------|--|
| (1) IEEE BROADCAST TECHNOLOGY CONVENTION LLC - (13-1656633)<br>445 HOES LANE,, PISCATAWAY, NJ 08854 | NON-PROFIT ACTIVITIES SCIENTIFIC & EDUCATIONAL | DE   | 0                   | 453,825                   | INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS, INC. (IEEE) |
| (2) IEEE INTERNATIONAL LLC (45-0570011)<br>445 HOES LANE, PISCATAWAY, NJ 08854                      | NON-PROFIT ACTIVITIES SCIENTIFIC & EDUCATIONAL | DE   | 0                   | 272,727                   | IEEE   |
| (3) IEEE GLOBAL LLC (13-1656633)<br>445 HOES LANE, PISCATAWAY, NJ 08854                             | NON-PROFIT ACTIVITIES SCIENTIFIC & EDUCATIONA  | DE   | 0                   | 0                         | IEEE   |
| (4)   |  |  |                     |                           |  |
| (5)   |  |  |                     |                           |  |
| (6)   |  |  |                     |                           |  |

**Part II Identification of Related Tax-Exempt Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year.

| (a)<br>Name, address, and EIN of related organization   | (b)<br>Primary activity                          | (c)<br>Legal domicile (state or foreign country) | (d)<br>Exempt Code section | (e)<br>Public charity status (if section 501(c)(3)) | (f)<br>Direct controlling entity | (g)<br>Section 512(b)(13) controlled entity? |    |
|---|--|--|----------------------------|---|----------------------------------|--|----|
|   |  |  |                            |   |                                  | Yes  | No |
| (1) IEEE FOUNDATION, INC. (23-7310664)<br>445 HOES LANE, PISCATAWAY, NJ 08854                       | FUNDRAISING                                      | NY   | 501(C)(3)                  | 7   | N/A                              |  | ✓  |
| (2) IEEE ASIA-PACIFIC LIMITED<br>1 FUSIONOPOLIS WALK 04-07 S. TOWER, SINGAPORE, SN                  | SCIENTIFIC & EDUCATIONAL                         | SINGAPORE  | 501(C)(3)                  |   | IEEE                             | ✓  |    |
| (3) GLOBAL IEEE INSTITUTE FOR ENGINEERS INDIA<br>26/1 5TH FL WTC BRIDGE GATEWAY DR R, BENGALURU, IN | SCIENTIFIC & EDUCATIONAL                         | INDIA  | 501(C)(3)                  |   | IEEE ASIA-PACIFIC LIMITED        | ✓  |    |
| (4) IEEE TECHNOLOGY CENTRE GMBH<br>HEINESTRASSE 38, VIENNA, AU                                      | SCIENTIFIC & EDUCATIONAL                         | AUSTRIA  | 501(C)(3)                  |   | IEEE                             | ✓  |    |
| (5) IEEE WORLDWIDE LIMITED (46-3332937)<br>445 HOES LANE, PISCATAWAY, NJ 08854                      | NON-PROFIT ACTIVITIES - SCIENTIFIC & EDUCATIONAL | NY   | 501(C)(3)                  | 12 TYPE I   | IEEE                             | ✓  |    |
| (6)   |  |  |                            |   |                                  |  |    |
| (7)   |  |  |                            |   |                                  |  |    |

**Part III Identification of Related Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

| (a)<br>Name, address, and EIN of related organization | (b)<br>Primary activity | (c)<br>Legal domicile (state or foreign country) | (d)<br>Direct controlling entity | (e)<br>Predominant income (related, unrelated, excluded from tax under sections 512–514) | (f)<br>Share of total income | (g)<br>Share of end-of-year assets | (h)<br>Disproportionate allocations? |    | (i)<br>Code V—UBI amount in box 20 of Schedule K-1 (Form 1065) | (j)<br>General or managing partner? |    | (k)<br>Percentage ownership |
|---|-------------------------|--|----------------------------------|--|------------------------------|------------------------------------|--------------------------------------|----|--|-------------------------------------|----|-----------------------------|
|   |                         |  |                                  |  |                              |                                    | Yes                                  | No |  | Yes                                 | No |                             |
| (1)-----  |                         |  |                                  |  |                              |                                    |                                      |    |  |                                     |    |                             |
| (2)-----  |                         |  |                                  |  |                              |                                    |                                      |    |  |                                     |    |                             |
| (3)-----  |                         |  |                                  |  |                              |                                    |                                      |    |  |                                     |    |                             |
| (4)-----  |                         |  |                                  |  |                              |                                    |                                      |    |  |                                     |    |                             |
| (5)-----  |                         |  |                                  |  |                              |                                    |                                      |    |  |                                     |    |                             |
| (6)-----  |                         |  |                                  |  |                              |                                    |                                      |    |  |                                     |    |                             |
| (7)-----  |                         |  |                                  |  |                              |                                    |                                      |    |  |                                     |    |                             |

**Part IV Identification of Related Organizations Taxable as a Corporation or Trust.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a corporation or trust during the tax year.

| (a)<br>Name, address, and EIN of related organization | (b)<br>Primary activity | (c)<br>Legal domicile (state or foreign country) | (d)<br>Direct controlling entity | (e)<br>Type of entity (C corp, S corp, or trust) | (f)<br>Share of total income | (g)<br>Share of end-of-year assets | (h)<br>Percentage ownership | (i)<br>Section 512(b)(13) controlled entity? |    |
|---|-------------------------|--|----------------------------------|--|------------------------------|------------------------------------|-----------------------------|--|----|
|   |                         |  |                                  |  |                              |                                    |                             | Yes  | No |
| (1)(SEE STATEMENT)-----                               |                         |  |                                  |  |                              |                                    |                             |  |    |
| (2)-----  |                         |  |                                  |  |                              |                                    |                             |  |    |
| (3)-----  |                         |  |                                  |  |                              |                                    |                             |  |    |
| (4)-----  |                         |  |                                  |  |                              |                                    |                             |  |    |
| (5)-----  |                         |  |                                  |  |                              |                                    |                             |  |    |
| (6)-----  |                         |  |                                  |  |                              |                                    |                             |  |    |
| (7)-----  |                         |  |                                  |  |                              |                                    |                             |  |    |

**Part V Transactions With Related Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

**Note:** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

|  | Yes | No |
|--|-----|----|
| <b>1</b> During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II–IV? |     |    |
| <b>a</b> Receipt of <b>(i)</b> interest, <b>(ii)</b> annuities, <b>(iii)</b> royalties, or <b>(iv)</b> rent from a controlled entity . . . . .               |     | ✓  |
| <b>b</b> Gift, grant, or capital contribution to related organization(s) . . . . .   | ✓   |    |
| <b>c</b> Gift, grant, or capital contribution from related organization(s) . . . . .   | ✓   |    |
| <b>d</b> Loans or loan guarantees to or for related organization(s) . . . . .  |     | ✓  |
| <b>e</b> Loans or loan guarantees by related organization(s) . . . . .   |     | ✓  |
| <b>f</b> Dividends from related organization(s) . . . . .  |     | ✓  |
| <b>g</b> Sale of assets to related organization(s) . . . . .   |     | ✓  |
| <b>h</b> Purchase of assets from related organization(s) . . . . .   |     | ✓  |
| <b>i</b> Exchange of assets with related organization(s) . . . . .   |     | ✓  |
| <b>j</b> Lease of facilities, equipment, or other assets to related organization(s) . . . . .  | ✓   |    |
| <b>k</b> Lease of facilities, equipment, or other assets from related organization(s) . . . . .  |     | ✓  |
| <b>l</b> Performance of services or membership or fundraising solicitations for related organization(s) . . . . .  | ✓   |    |
| <b>m</b> Performance of services or membership or fundraising solicitations by related organization(s) . . . . .   | ✓   |    |
| <b>n</b> Sharing of facilities, equipment, mailing lists, or other assets with related organization(s) . . . . .   | ✓   |    |
| <b>o</b> Sharing of paid employees with related organization(s) . . . . .  | ✓   |    |
| <b>p</b> Reimbursement paid to related organization(s) for expenses . . . . .  | ✓   |    |
| <b>q</b> Reimbursement paid by related organization(s) for expenses . . . . .  | ✓   |    |
| <b>r</b> Other transfer of cash or property to related organization(s) . . . . .   | ✓   |    |
| <b>s</b> Other transfer of cash or property from related organization(s) . . . . .   | ✓   |    |

**2** If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

| (a)<br>Name of related organization                  | (b)<br>Transaction type (a–s) | (c)<br>Amount involved | (d)<br>Method of determining amount involved |
|--|-------------------------------|------------------------|--|
| <b>(1)</b> GLOBAL IEEE INSTITUTE FOR ENGINEERS INDIA | M                             | 2,446,025              | ACCRUAL                                      |
| <b>(2)</b> IEEE ASIA-PACIFIC LIMITED                 | M                             | 1,510,885              | ACCRUAL                                      |
| <b>(3)</b> IEEE TECHNOLOGY CENTRE GMBH               | P                             | 1,355,767              | ACCRUAL                                      |
| <b>(4)</b> IEEE WORLDWIDE LIMITED                    | R                             | 114,129                | ACCRUAL                                      |
| <b>(5)</b> IEEE, INC.                                | M                             | 1,637,052              | ACCRUAL                                      |
| <b>(6)</b>   |                               |                        |  |

**Part VI** **Unrelated Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

| (a)<br>Name, address, and EIN of entity | (b)<br>Primary activity | (c)<br>Legal domicile (state or foreign country) | (d)<br>Predominant income (related, unrelated, excluded from tax under sections 512–514) | (e)<br>Are all partners section 501(c)(3) organizations? |    | (f)<br>Share of total income | (g)<br>Share of end-of-year assets | (h)<br>Disproportionate allocations? |    | (i)<br>Code V—UBI amount in box 20 of Schedule K-1 (Form 1065) | (j)<br>General or managing partner? |    | (k)<br>Percentage ownership |
|---|-------------------------|--|--|--|----|------------------------------|------------------------------------|--------------------------------------|----|--|-------------------------------------|----|-----------------------------|
|   |                         |  |  | Yes  | No |                              |                                    | Yes                                  | No |  | Yes                                 | No |                             |
| (1) .....                               |                         |  |  |  |    |                              |                                    |                                      |    |  |                                     |    |                             |
| (2) .....                               |                         |  |  |  |    |                              |                                    |                                      |    |  |                                     |    |                             |
| (3) .....                               |                         |  |  |  |    |                              |                                    |                                      |    |  |                                     |    |                             |
| (4) .....                               |                         |  |  |  |    |                              |                                    |                                      |    |  |                                     |    |                             |
| (5) .....                               |                         |  |  |  |    |                              |                                    |                                      |    |  |                                     |    |                             |
| (6) .....                               |                         |  |  |  |    |                              |                                    |                                      |    |  |                                     |    |                             |
| (7) .....                               |                         |  |  |  |    |                              |                                    |                                      |    |  |                                     |    |                             |
| (8) .....                               |                         |  |  |  |    |                              |                                    |                                      |    |  |                                     |    |                             |
| (9) .....                               |                         |  |  |  |    |                              |                                    |                                      |    |  |                                     |    |                             |
| (10) .....                              |                         |  |  |  |    |                              |                                    |                                      |    |  |                                     |    |                             |
| (11) .....                              |                         |  |  |  |    |                              |                                    |                                      |    |  |                                     |    |                             |
| (12) .....                              |                         |  |  |  |    |                              |                                    |                                      |    |  |                                     |    |                             |
| (13) .....                              |                         |  |  |  |    |                              |                                    |                                      |    |  |                                     |    |                             |
| (14) .....                              |                         |  |  |  |    |                              |                                    |                                      |    |  |                                     |    |                             |
| (15) .....                              |                         |  |  |  |    |                              |                                    |                                      |    |  |                                     |    |                             |
| (16) .....                              |                         |  |  |  |    |                              |                                    |                                      |    |  |                                     |    |                             |

**Part IV****Identification of Related Organizations Taxable as a Corporation or Trust** (continued)

| (a) Name, address and EIN of related organization   | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Direct controlling entity | (e) Type of entity (C-corp, S-corp or trust) | (f) Share of total income | (g) Share of end-of-year assets | (h) Percentage ownership | (i) Section 512(b)(13) controlled entity? |    |
|---|----------------------|---|-------------------------------|--|---------------------------|---------------------------------|--------------------------|---|----|
|   |                      |   |                               |  |                           |                                 |                          | Yes                                       | No |
| (1) IEEE, INC. (20-8766830)<br>445 HOES LANE, PISCATAWAY, NJ 08854  | SUPPORT SERVICES     | DE  | IEEE                          | C CORPORATION                                | 1,918,183                 | 2,115,051                       | 100.00                   | ✓   |    |
| (2) IEEE EUROPE GMBH<br>C/O FIDUCIA, INTERGEST SA RUE JOSEPH-GIRAD,<br>CAROUGE, 24-1227, SZ                                       | SUPPORT SERVICES     | SWITZERLAND                                   | IEEE                          | C CORPORATION                                | 0                         | 0                               | 100.00                   | ✓   |    |
| (3) INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS (IEEE) LATIN AMERICA SA,, C/O POSADAS,<br>MONES ROSES, MONTEVIDEO, 6937, UY | SUPPORT SERVICES     | URUGUAY                                       | IEEE                          | C CORPORATION                                | 0                         | 0                               | 100.00                   | ✓   |    |