

**Return of Organization Exempt From Income Tax**  
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

**2020**

Open to Public Inspection

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.

**A** For the 2020 calendar year, or tax year beginning and ending

|  |  |  |  |
|--|--|--|--|
| <b>B</b> Check if applicable:<br><input type="checkbox"/> Address change<br><input type="checkbox"/> Name change<br><input type="checkbox"/> Initial return<br><input type="checkbox"/> Final return/terminated<br><input type="checkbox"/> Amended return<br><input type="checkbox"/> Application pending | <b>C</b> Name of organization<br>INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS, INC.               |  | <b>D</b> Employer identification number<br>13-1656633  |
|  | Doing business as IEEE   |  |  |
|  | Number and street (or P.O. box if mail is not delivered to street address) Room/suite<br>445 HOES LANE |  | <b>E</b> Telephone number<br>(732)981-0060   |
|  | City or town, state or province, country, and ZIP or foreign postal code<br>PISCATAWAY, NJ 08854       |  | <b>G</b> Gross receipts \$ 757,101,794.  |
|  | F Name and address of principal officer: STEPHEN WELBY<br>445 HOES LANE, PISCATAWAY, NJ 08854          |  | <b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No<br><b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>If "No," attach a list. See instructions<br><b>H(c)</b> Group exemption number ▶ 2038 |

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

**J** Website: ▶ WWW.IEEE.ORG

**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> | 1 Briefly describe the organization's mission or most significant activities: IEEE REMAINS TRUE TO ITS MISSION OF ADVANCING TECHNOLOGY FOR THE ADVANCEMENT OF HUMANITY. |  |   |
|                                    | 2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.                               |  |   |
|                                    | 3   | Number of voting members of the governing body (Part VI, line 1a)                  | 31  |
|                                    | 4   | Number of independent voting members of the governing body (Part VI, line 1b)      | 30  |
|                                    | 5   | Total number of individuals employed in calendar year 2020 (Part V, line 2a)       | 1141  |
|                                    | 6   | Total number of volunteers (estimate if necessary)                                 | 100000  |
|                                    | 7a  | Total unrelated business revenue from Part VIII, column (C), line 12               | 10,525,063.   |
| 7b                                 | Net unrelated business taxable income from Form 990-T, Part I, line 11  | 0.   |   |
| <b>Revenue</b>                     | 8   | Contributions and grants (Part VIII, line 1h)                                      | Prior Year: 3,077,248. Current Year: 1,941,201.                   |
|                                    | 9   | Program service revenue (Part VIII, line 2g)                                       | 515,122,637. 435,169,563.   |
|                                    | 10  | Investment income (Part VIII, column (A), lines 3, 4, and 7d)                      | 24,978,608. 23,037,408.   |
|                                    | 11  | Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)           | 20,071,559. 18,191,229.   |
|                                    | 12  | Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) | 563,250,052. 478,339,401.   |
|                                    | 13  | Grants and similar amounts paid (Part IX, column (A), lines 1-3)                   | 4,116,338. 5,174,317.   |
| <b>Expenses</b>                    | 14  | Benefits paid to or for members (Part IX, column (A), line 4)                      | 0. 0.   |
|                                    | 15  | Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)  | 176,558,640. 173,815,492.   |
|                                    | 16a   | Professional fundraising fees (Part IX, column (A), line 11e)                      | 66,605. 53,731.   |
|                                    | 16b   | Total fundraising expenses (Part IX, column (D), line 25) ▶ 1,614,227.             |   |
|                                    | 17  | Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)                       | 302,236,905. 198,581,829.   |
|                                    | 18  | Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)          | 482,978,488. 377,625,369.   |
| 19                                 | Revenue less expenses. Subtract line 18 from line 12  | 80,271,564. 100,714,032.   |   |
| <b>Net Assets or Fund Balances</b> | 20  | Total assets (Part X, line 16)   | Beginning of Current Year: 819,633,360. End of Year: 961,106,109. |
|                                    | 21  | Total liabilities (Part X, line 26)  | 248,397,772. 241,067,412.   |
|                                    | 22  | Net assets or fund balances. Subtract line 21 from line 20                         | 571,235,588. 720,038,697.   |

**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.

Signature of officer: *Thomas R Siegert* Date: 4/1/2021

THOMAS R SIEGERT, ASSISTANT TREASURER & CFO

Type or print name and title

|                               |                            |                      |      |   |      |
|-------------------------------|----------------------------|----------------------|------|---|------|
| <b>Paid Preparer Use Only</b> | Print/Type preparer's name | Preparer's signature | Date | Check if self-employed <input type="checkbox"/> | 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

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

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 990-T (corporation)          | 07          |
| Form 990-BL                              | 02          | 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          |

IEEE CONTROLLER OFFICE

- The books are in the care of ▶ 445 HOES LANE - PISCATAWAY, NJ 08854  
Telephone No. ▶ 732-981-0060 Fax No. ▶ \_\_\_\_\_
- 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, 2021, to file the exempt organization return for the organization named above. The extension is for the organization's return for:  
▶  calendar year 2020 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-BL, 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-EO and Form 8879-EO for payment instructions.

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

Form **8868** (Rev. 1-2020)

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

**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.

**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 \$ 87,307,272. including grants of \$ 4,928,859. ) (Revenue \$ 49,857,547. )  
MEMBERSHIPS & PUBLIC IMPERATIVES:  
IEEE IS A PUBLIC CHARITY DEDICATED TO ADVANCING TECHNOLOGY FOR THE  
BENEFIT OF HUMANITY. IEEE HAD A TOTAL OF 396,007 MEMBERS FROM MORE THAN  
160 COUNTRIES WORLDWIDE IN 2020 INCLUDING 107,618 STUDENT MEMBERS AND  
333,214 SOCIETY MEMBERS FROM THE 39 IEEE SOCIETIES. IN 2020, IEEE  
CREATED THE COVID-19 NEWS AND RESOURCES HUB AT IEEE SPECTRUM, A  
COMPILATION OF PRODUCTS, SERVICES, COURSES, AND TOOLS TO HELP IEEE  
MEMBERS DURING THE PANDEMIC. IEEE-USA, AN ORGANIZATIONAL UNIT  
SUPPORTING THE CAREER AND PUBLIC POLICY INTERESTS OF U.S. MEMBERS,  
LAUNCHED THE "HERE TO HELP" CAMPAIGN FEATURING ONLINE CONTENT AND  
RESOURCES TO ASSIST MEMBERS DURING THE COVID-19 CRISIS. IN ADDITION TO  
MAKING ITS E-BOOKS FREE TO ALL IEEE MEMBERS WORLDWIDE, THE CAMPAIGN

**4b** (Code: ) (Expenses \$ 163,435,988. including grants of \$ 0. ) (Revenue \$ 221,085,534. )  
PERIODICALS:  
THE IEEE XPLORE(R) DIGITAL LIBRARY IS ONE OF THE WORLD'S LARGEST  
COLLECTIONS OF TECHNICAL LITERATURE IN ENGINEERING, COMPUTER SCIENCE  
AND RELATED TECHNOLOGIES WITH OVER 5 MILLION DOCUMENTS AVAILABLE IN ITS  
VAST REPOSITORY. IN 2020, IEEE CONTINUED 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 2020, IEEE PUBLISHED 222,035 CONFERENCE ARTICLES AND 86,052  
JOURNAL AND MAGAZINE ARTICLES. IEEE'S PUBLISHING PROGRAM CONTINUES TO  
GROW AND EVOLVE FOR BOTH SUBSCRIPTION JOURNALS AND OPEN ACCESS TITLES.  
IN 2020, IEEE ADDED 14 NEW FULLY OPEN ACCESS, "GOLD," JOURNALS TO ITS  
OPEN ACCESS PUBLISHING PORTFOLIO. THROUGH GOLD OPEN ACCESS, THE AUTHOR

**4c** (Code: ) (Expenses \$ 80,811,914. including grants of \$ 245,458. ) (Revenue \$ 125,464,060. )  
CONFERENCES:  
IN 2020, IEEE SPONSORED 1,611 SPONSORED CONFERENCES IN 96 COUNTRIES  
WORLDWIDE WITH OVER 465,000 ATTENDEES, DESPITE CHALLENGES ARISING FROM  
THE GLOBAL COVID-19 PANDEMIC. IEEE LEVERAGED ITS DIGITAL EVENT CENTER  
OF EXCELLENCE, PROVIDING DIGITAL ALTERNATIVES FOR CONFERENCE ORGANIZERS  
SHIFTING TO A VIRTUAL EVENT FORMAT.  
  
IN 2020, THE MEETINGS, CONFERENCES AND EVENTS TEAM PRODUCED OVER 50  
VIRTUAL CONFERENCES AT NO CHARGE. THEY ALSO PROVIDED PLATFORMS AND  
MATERIALS FOR ORGANIZERS TO PRODUCE ANOTHER 50 EVENTS, AGAIN AT NO  
CHARGE.

**4d** Other program services (Describe on Schedule O.)  
(Expenses \$ 35,886,258. including grants of \$ 0. ) (Revenue \$ 31,056,922. )

**4e** Total program service expenses 367,441,432.

**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)?<br><i>If "Yes," complete Schedule A</i> .....  | X   |    |
| <b>2</b> Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? .....   | X   |    |
| <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> .....  |     | X  |
| <b>4 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> .....  | X   |    |
| <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 Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III</i> .....   |     | X  |
| <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> .....  |     | X  |
| <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> .....  |     | X  |
| <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> .....   |     | X  |
| <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?<br><i>If "Yes," complete Schedule D, Part IV</i> .....         | X   |    |
| <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> .....   |     | X  |
| <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> .....   | X   |    |
| <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> .....  | X   |    |
| <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> .....  |     | X  |
| <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> .....   |     | X  |
| <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> .....   |     | X  |
| <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> .....  | X   |    |
| <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> .....  |     | X  |
| <b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year?<br><i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i> .....  | X   |    |
| <b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i> .....  |     | X  |
| <b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States? .....  | X   |    |
| <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> ..... | X   |    |
| <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> .....   | X   |    |
| <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> .....   | X   |    |
| <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</i> .....   | X   |    |
| <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> .....   |     | X  |
| <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> .....   |     | X  |
| <b>20a</b> Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i> .....   |     | X  |
| <b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? .....   |     |    |
| <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> .....  | X   |    |

**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> .....  | X   |    |
| <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> .....   | X   |    |
| <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> .....  |     | X  |
| <b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? .....  |     |    |
| <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? .....   |     |    |
| <b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? .....  |     |    |
| <b>25a 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> .....  |     | X  |
| <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> .....   |     | X  |
| <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> .....   |     | X  |
| <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> ..... |     | X  |
| <b>28</b> Was the organization a party to a business transaction with one of the following parties (see 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> .....  |     | X  |
| <b>b</b> A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i> .....   | X   |    |
| <b>c</b> A 35% controlled entity of one or more individuals and/or organizations described in lines 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i> .....   |     | X  |
| <b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i> .....   |     | X  |
| <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> .....   |     | X  |
| <b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> .....   |     | X  |
| <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> .....   |     | X  |
| <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> .....   | X   |    |
| <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> .....   | X   |    |
| <b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? .....  | X   |    |
| <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> .....   | X   |    |
| <b>36 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> .....   |     | X  |
| <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> .....  |     | X  |
| <b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? <b>Note:</b> All Form 990 filers are required to complete Schedule O .....   | X   |    |

**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 in 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? ..... | X   |    |

**Part V** Statements Regarding Other IRS Filings and Tax Compliance (continued)

|  |  | 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> 1141   |     |    |
| <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>   | X   |    |
| <b>Note:</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions) ..... |  |     |    |
| <b>3a</b>  | Did the organization have unrelated business gross income of \$1,000 or more during the year? ..... <b>3a</b>  | X   |    |
| <b>b</b>   | If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O ..... <b>3b</b>  | X   |    |
| <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> | X   |    |
| <b>b</b>   | If "Yes," enter the name of the foreign country ► SEE SCHEDULE O<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>  |     | X  |
| <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>   |     | X  |
| <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>                                    |     | X  |
| <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>  |     | X  |
| <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>   |     | X  |
| <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>  |     | X  |
| <b>f</b>   | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ..... <b>7f</b>   |     | X  |
| <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? ..... <b>13a</b>  |     |    |
| <b>Note:</b> See the instructions for additional information the organization must report on Schedule O.               |  |     |    |
| <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>  |     | X  |
| <b>b</b>   | If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O ..... <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? ..... <b>15</b>   |     | X  |
| If "Yes," see instructions and file Form 4720, Schedule N.   |  |     |    |
| <b>16</b>  | Is the organization an educational institution subject to the section 4968 excise tax on net investment income? ..... <b>16</b>  |     | X  |
| If "Yes," complete Form 4720, Schedule O.  |  |     |    |

**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 ..... 31<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>b</b>  | Enter the number of voting members included on line 1a, above, who are independent ..... 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? .....   |     | X  |
| <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? .....   |     | X  |
| <b>4</b>  | Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? .....  |     | X  |
| <b>5</b>  | Did the organization become aware during the year of a significant diversion of the organization's assets? .....  |     | X  |
| <b>6</b>  | Did the organization have members or stockholders? .....  | X   |    |
| <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? .....  | X   |    |
| <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? .....   | X   |    |
| <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? .....   | X   |    |
| <b>b</b>  | Each committee with authority to act on behalf of the governing body? .....   | X   |    |
| <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 .....  |     | X  |

**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? .....   | X   |    |
| <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? .....   | X   |    |
| <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? .....  | X   |    |
| <b>b</b>   | Describe in 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 .....  | X   |    |
| <b>b</b>   | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? .....  | X   |    |
| <b>c</b>   | Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done .....   | X   |    |
| <b>13</b>  | Did the organization have a written whistleblower policy? .....  | X   |    |
| <b>14</b>  | Did the organization have a written document retention and destruction policy? .....   | X   |    |
| <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 .....   | X   |    |
| <b>b</b>   | Other officers or key employees of the organization .....  | X   |    |
|            | If "Yes" to line 15a or 15b, describe the process in 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? .....  |     | X  |
| <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 ► **SEE 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 - 732-981-0060**  
**445 HOES LANE, PISCATAWAY, NJ 08854**

**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 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 and/or Box 7 of Form 1099-MISC) 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 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 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) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC) | (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>ASST. SECRETARY & EXEC DIRECTOR                | 40.00<br>1.00   |  |                       | X       |              |                              |        | 944,211.   | 0.  | 204,093.  |
| (2) MARY WARD-CALLAN<br>MANAGING DIRECTOR TECH ACTIVITIES           | 40.00<br>0.00   |  |                       |         | X            |                              |        | 575,519.   | 0.  | 53,402.   |
| (3) KONSTANTINOS KARACHALIOS<br>MANAGING DIRECTOR IEEE STANDARDS    | 40.00<br>0.00   |  |                       |         |              | X                            |        | 512,062.   | 0.  | 37,500.   |
| (4) THOMAS R. SIEGERT<br>ASST. TREASURER & CFO                      | 40.00<br>1.00   |  |                       | X       |              |                              |        | 500,920.   | 0.  | 47,646.   |
| (5) SOPHIA MUIRHEAD<br>GENERAL COUNSEL & CCO                        | 40.00<br>0.00   |  |                       |         |              | X                            |        | 461,943.   | 0.  | 47,359.   |
| (6) EMILY CSERNICA<br>DIRECTOR NORTH AMERICAN SALES                 | 40.00<br>0.00   |  |                       |         |              | X                            |        | 452,687.   | 0.  | 39,838.   |
| (7) PAUL CANNING<br>REGIONAL SALES MANAGER EMEA                     | 40.00<br>0.00   |  |                       |         |              | X                            |        | 440,749.   | 0.  | 49,036.   |
| (8) FRANCIS STAPLES<br>SN DIRECTOR GLOBAL SALES & CUST OPS          | 40.00<br>0.00   |  |                       |         |              | X                            |        | 440,619.   | 0.  | 47,914.   |
| (9) DONNA HOURICAN<br>STAFF EXECUTIVE CORP ACTIVITIES               | 40.00<br>0.00   |  |                       |         | X            |                              |        | 437,639.   | 0.  | 37,500.   |
| (10) KAREN L HAWKINS<br>CHIEF MARKETING OFFICER                     | 40.00<br>0.00   |  |                       |         | X            |                              |        | 425,045.   | 0.  | 43,389.   |
| (11) CHERIF AMIRAT<br>CHIEF INFORMATION OFFICER                     | 40.00<br>0.00   |  |                       |         | X            |                              |        | 413,757.   | 0.  | 48,915.   |
| (12) MICHAEL FORSTER (THRU 04/20)<br>MANAGING DIRECTOR PUBLICATIONS | 40.00<br>0.00   |  |                       |         | X            |                              |        | 204,710.   | 0.  | 25,713.   |
| (13) DAVID B. DUROCHER<br>DIRECTOR & DELEGATE, DIVISION II          | 5.00<br>0.00  | X  |                       |         |              |                              |        | 17,500.  | 0.  | 0.  |
| (14) TOSHIO FUKUDA<br>IEEE PRESIDENT AND CEO                        | 10.00<br>0.00   | X  |                       | X       |              |                              |        | 1,213.   | 0.  | 0.  |
| (15) JOSE M.F. MOURA<br>IEEE PAST PRESIDENT                         | 10.00<br>0.00   | X  |                       | X       |              |                              |        | 0.   | 0.  | 0.  |
| (16) SUSAN LAND<br>IEEE PRESIDENT-ELECT                             | 10.00<br>0.00   | X  |                       | X       |              |                              |        | 0.   | 0.  | 0.  |
| (17) KATHLEEN KRAMER<br>DIRECTOR & SECRETARY                        | 10.00<br>0.00   | X  |                       | X       |              |                              |        | 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 line) | (C)<br>Position (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) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC) | (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 |  |   |   |
| (18) JOSEPH V. LILLIE<br>DIRECTOR & TREASURER                  | 10.00<br>0.00   | X   |                       | X       |              |                              |        | 0.   | 0.  | 0.  |
| (19) STEPHEN M. PHILLIPS<br>DIRECTOR & VP, EDUCATION ACTIVITY  | 10.00<br>0.00   | X   |                       | X       |              |                              |        | 0.   | 0.  | 0.  |
| (20) TAPAN SARKAR<br>DIRECTOR & VP, PUBS SVC & PROD.           | 10.00<br>0.00   | X   |                       | X       |              |                              |        | 0.   | 0.  | 0.  |
| (21) KUKJIN CHUN<br>DIRECTOR & VP, MEMB & GEOG. ACT            | 10.00<br>0.00   | X   |                       | X       |              |                              |        | 0.   | 0.  | 0.  |
| (22) ROBERT S. FISH<br>DIRECTOR & PRES., STANDARDS ASSOC.      | 10.00<br>0.00   | X   |                       | X       |              |                              |        | 0.   | 0.  | 0.  |
| (23) KAZUHIRO KOSUGE<br>DIRECTOR & VP, TECHNICAL ACTIVITIES    | 10.00<br>0.00   | X   |                       | X       |              |                              |        | 0.   | 0.  | 0.  |
| (24) JAMES M. CONRAD<br>DIRECTOR & PRESIDENT IEEE-USA          | 10.00<br>0.00   | X   |                       | X       |              |                              |        | 0.   | 0.  | 0.  |
| (25) EDUARDO F. PALACIO<br>DIRECTOR & DELEGATE, REGION 1       | 5.00<br>0.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (26) WOLFRAM BETTERMANN<br>DIRECTOR & DELEGATE, REGION 2       | 5.00<br>0.00  | X   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| <b>1b Subtotal</b>   |   |   |                       |         |              |                              |        | 5,828,574.   | 0.  | 682,305.  |
| <b>c Total from continuation sheets to Part VII, Section A</b> |   |   |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| <b>d Total (add lines 1b and 1c)</b>                           |   |   |                       |         |              |                              |        | 5,828,574.   | 0.  | 682,305.  |

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 545

|  | Yes | No |
|--|-----|----|
| 3 Did the organization list any former officer, director, trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual   |     | X  |
| 4 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? If "Yes," complete Schedule J for such individual | X   |    |
| 5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person                       |     | X  |

**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.<br>61-18 190TH STREET, FRESH MEADOW, NY 11365  | GRAPHIC CONVERSION, EDITING,<br>XML TAGGING | 5,809,179.          |
| ORACLE AMERICA, INC., 500 ORACLE PARKWAY<br>REDWOOD SHORES, SAN MATEO, CA 94065 | FINANCIAL SYSTEM SUBSCRIPTION<br>& MAINTENA | 5,463,195.          |
| IENERGIZER APTARA LIMITED<br>PO 13963, CHICAGO, IL 60693                        | XML & IMAGE CONVERSION, PAGE<br>COMPOSITION | 3,263,495.          |
| FINN PARTNERS, INC.<br>301 EAST 57TH ST., NEW YORK, NY 10022                    | COMMUNICATIONS MANAGEMENT                   | 3,219,434.          |
| IMEX GLOBAL SOLUTIONS LLC<br>6567 SOLUTION CENTER, CHICAGO, IL 60677            | INTERNATIONAL MAILING SERVICES<br>FOR IEEE  | 2,477,035.          |

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 185

SEE PART VII, SECTION A CONTINUATION SHEETS

**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 line) | (C)<br>Position (check all that apply) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC) | (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 |  |   |   |
| (27) JILL I. GOSTIN<br>DIRECTOR & DELEGATE, REGION 3          | 5.00<br>0.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (28) DAVID A. KOEHLER<br>DIRECTOR & DELEGATE, REGION 4        | 5.00<br>0.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (29) JAMES R. LOOK<br>DIRECTOR & DELEGATE, REGION 5           | 5.00<br>0.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (30) KEITH A. MOORE<br>DIRECTOR & DELEGATE, REGION 6          | 5.00<br>0.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (31) JASON J. GU<br>DIRECTOR & DELEGATE, REGION 7             | 5.00<br>0.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (32) MAGDALENA SALAZAR-PALMA<br>DIRECTOR & DELEGATE, REGION 8 | 5.00<br>0.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (33) ALBERTO SANCHEZ<br>DIRECTOR & DELEGATE, REGION 9         | 5.00<br>0.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (34) AKINORI NISHIHARA<br>DIRECTOR & DELEGATE, REGION 10      | 5.00<br>0.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (35) ALFRED E. DUNLOP<br>DIRECTOR & DELEGATE, DIVISION I      | 5.00<br>0.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (36) SERGIO BENEDETTO<br>DIRECTOR & DELEGATE, DIVISION III    | 5.00<br>0.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (37) JOHN P. VERBONCOEUR<br>DIRECTOR & DELEGATE, DIVISION IV  | 5.00<br>0.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (38) THOMAS M. CONTE<br>DIRECTOR & DELEGATE, DIVISION V       | 5.00<br>0.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (39) MANUEL CASTRO<br>DIRECTOR & DELEGATE, DIVISION VI        | 5.00<br>0.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (40) MIRIAM P. SANDERS<br>DIRECTOR & DELEGATE, DIVISION VII   | 5.00<br>0.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (41) ELIZABETH BURD<br>DIRECTOR & DELEGATE, DIVISION VIII     | 5.00<br>0.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (42) RABAB KREIDEIH WARD<br>DIRECTOR & DELEGATE, DIVISION IX  | 5.00<br>0.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| (43) LJILJANA TRAJKOVIC<br>DIRECTOR & DELEGATE, DIVISION X    | 5.00<br>0.00  | X                                      |                       |         |              |                              |        | 0.   | 0.  | 0.  |
| Total to Part VII, Section A, line 1c .....                   |   |  |                       |         |              |                              |        |  |   |   |

**Part VIII Statement of Revenue**

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

|   |   |               | (A)            | (B)                                | (C)                        | (D)  |  |
|---|---|---------------|----------------|------------------------------------|----------------------------|--|--|
|   |   |               | Total revenue  | Related or exempt function revenue | Unrelated business revenue | Revenue excluded from tax under sections 512 - 514 |  |
| Contributions, Gifts, Grants and Other Similar Amounts  | <b>1 a</b> Federated campaigns  | <b>1a</b>     |                |                                    |                            |  |  |
|   | <b>b</b> Membership dues  | <b>1b</b>     |                |                                    |                            |  |  |
|   | <b>c</b> Fundraising events   | <b>1c</b>     |                |                                    |                            |  |  |
|   | <b>d</b> Related organizations  | <b>1d</b>     | 1,891,306.     |                                    |                            |  |  |
|   | <b>e</b> Government grants (contributions)  | <b>1e</b>     |                |                                    |                            |  |  |
|   | <b>f</b> All other contributions, gifts, grants, and similar amounts not included above | <b>1f</b>     | 49,895.        |                                    |                            |  |  |
|   | <b>g</b> Noncash contributions included in lines 1a-1f                                  | <b>1g</b>     | \$             |                                    |                            |  |  |
|   | <b>h Total.</b> Add lines 1a-1f   |               |                | 1,941,201.                         |                            |  |  |
| Program Service Revenue   | <b>2 a</b> PERIODICALS  | Business Code | 900099         | 221,085,534.                       | 221,085,534.               |  |  |
|   | <b>b</b> CONFERENCE REVENUE   |               | 900099         | 125,464,060.                       | 125,464,060.               |  |  |
|   | <b>c</b> MEMBERSHIP PUBLIC IMP  |               | 900099         | 49,857,547.                        | 49,857,547.                |  |  |
|   | <b>d</b> STANDARDS REVENUE  |               | 900099         | 31,041,204.                        | 31,041,204.                |  |  |
|   | <b>e</b> ADVERTISING REVENUE  |               | 541800         | 7,705,500.                         |                            | 7,705,500.   |  |
|   | <b>f</b> All other program service revenue  |               | 900099         | 15,718.                            | 15,718.                    |  |  |
|   | <b>g Total.</b> Add lines 2a-2f   |               |                | 435,169,563.                       |                            |  |  |
| Other Revenue   | <b>3</b> Investment income (including dividends, interest, and other similar amounts)   |               |                | 11,292,446.                        |                            | 11,292,446.  |  |
|   | <b>4</b> Income from investment of tax-exempt bond proceeds                             |               |                |                                    |                            |  |  |
|   | <b>5</b> Royalties  |               |                | 15,371,666.                        |                            | 15,371,666.  |  |
|   | <b>6 a</b> Gross rents  | <b>6a</b>     | (i) Real       |                                    |                            |  |  |
|   |   |               | (ii) Personal  |                                    |                            |  |  |
|   |   |               |                |                                    |                            |  |  |
|   | <b>b</b> Less: rental expenses  | <b>6b</b>     |                |                                    |                            |  |  |
|   | <b>c</b> Rental income or (loss)  | <b>6c</b>     |                |                                    |                            |  |  |
|   | <b>d</b> Net rental income or (loss)  |               |                |                                    |                            |  |  |
|   | <b>7 a</b> Gross amount from sales of assets other than inventory                       | <b>7a</b>     | (i) Securities | 290,507,355.                       |                            |  |  |
|   |   |               | (ii) Other     |                                    |                            |  |  |
|   |   |               |                |                                    |                            |  |  |
|   |   |               |                |                                    |                            |  |  |
| <b>b</b> Less: cost or other basis and sales expenses   | <b>7b</b>   |               | 278,762,393.   |                                    |                            |  |  |
| <b>c</b> Gain or (loss)   | <b>7c</b>   |               | 11,744,962.    |                                    |                            |  |  |
| <b>d</b> Net gain or (loss)   |   |               | 11,744,962.    |                                    | 11,744,962.                |  |  |
| <b>8 a</b> Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18 | <b>8a</b>   |               |                |                                    |                            |  |  |
|   |   |               |                |                                    |                            |  |  |
|   |   |               |                |                                    |                            |  |  |
| <b>b</b> Less: direct expenses  | <b>8b</b>   |               |                |                                    |                            |  |  |
| <b>c</b> Net income or (loss) from fundraising events   |   |               |                |                                    |                            |  |  |
| <b>9 a</b> Gross income from gaming activities. See Part IV, line 19  | <b>9a</b>   |               |                |                                    |                            |  |  |
|   |   |               |                |                                    |                            |  |  |
|   |   |               |                |                                    |                            |  |  |
| <b>b</b> Less: direct expenses  | <b>9b</b>   |               |                |                                    |                            |  |  |
| <b>c</b> Net income or (loss) from gaming activities  |   |               |                |                                    |                            |  |  |
| <b>10 a</b> Gross sales of inventory, less 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   |   |               |                |                                    |                            |  |  |
| Miscellaneous Revenue   | <b>11 a</b> INTERCOMPANY SERVICES & OTHER   | Business Code | 541900         | 2,362,067.                         |                            | 2,362,067.   |  |
|   | <b>b</b> ENGINEERING CERTIFICATION PROGRAM  |               | 541900         | 457,496.                           |                            | 457,496.   |  |
|   | <b>c</b> _____  |               |                |                                    |                            |  |  |
|   | <b>d</b> All other revenue  |               |                |                                    |                            |  |  |
|   | <b>e Total.</b> Add lines 11a-11d   |               |                | 2,819,563.                         |                            |  |  |
| <b>12 Total revenue.</b> See instructions   |   |               | 478,339,401.   | 427,464,063.                       | 10,525,063.                | 38,409,074.  |  |

**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

| Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.  | (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   | 2,890,498.            | 2,890,498.                      |  |                             |
| <b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22  | 828,266.              | 828,266.                        |  |                             |
| <b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16   | 1,455,553.            | 1,455,553.                      |  |                             |
| <b>4</b> Benefits paid to or for members  |                       |                                 |  |                             |
| <b>5</b> Compensation of current officers, directors, trustees, and key employees   | 3,962,460.            | 3,724,890.                      | 237,570.                               |                             |
| <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)   | 94,377.               | 94,377.                         |  |                             |
| <b>7</b> Other salaries and wages   | 128,955,253.          | 127,493,669.                    | 577,662.                               | 883,922.                    |
| <b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)   | 19,527,966.           | 19,410,605.                     | 6,256.                                 | 111,105.                    |
| <b>9</b> Other employee benefits  | 12,441,623.           | 12,367,976.                     |  | 73,647.                     |
| <b>10</b> Payroll taxes   | 8,833,813.            | 8,490,058.                      | 270,869.                               | 72,886.                     |
| <b>11</b> Fees for services (nonemployees):   |                       |                                 |  |                             |
| <b>a</b> Management   |                       |                                 |  |                             |
| <b>b</b> Legal  | 1,840,642.            | 1,839,530.                      | 1,112.                                 |                             |
| <b>c</b> Accounting   | 710,809.              | 710,421.                        | 388.                                   |                             |
| <b>d</b> Lobbying   |                       |                                 |  |                             |
| <b>e</b> Professional fundraising services. See Part IV, line 17  | 53,731.               |                                 |  | 53,731.                     |
| <b>f</b> Investment management fees   | 1,425,700.            |                                 | 1,425,700.                             |                             |
| <b>g</b> Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)  | 32,697,406.           | 32,454,829.                     | 196,744.                               | 45,833.                     |
| <b>12</b> Advertising and promotion   | 6,109,436.            | 6,023,445.                      | 26,300.                                | 59,691.                     |
| <b>13</b> Office expenses   | 11,968,439.           | 11,819,726.                     | 72,120.                                | 76,593.                     |
| <b>14</b> Information technology  | 16,860,493.           | 16,631,159.                     | 216,947.                               | 12,387.                     |
| <b>15</b> Royalties   | 14,426,067.           | 14,426,067.                     |  |                             |
| <b>16</b> Occupancy   | 5,583,956.            | 2,218,048.                      | 3,365,908.                             |                             |
| <b>17</b> Travel  | 4,496,873.            | 4,398,489.                      | 80,903.                                | 17,481.                     |
| <b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials  |                       |                                 |  |                             |
| <b>19</b> Conferences, conventions, and meetings  | 21,498,789.           | 21,465,580.                     | 33,209.                                |                             |
| <b>20</b> Interest  | 413,418.              | 413,418.                        |  |                             |
| <b>21</b> Payments to affiliates  |                       |                                 |  |                             |
| <b>22</b> Depreciation, depletion, and amortization   | 10,154,208.           | 8,228,501.                      | 1,919,300.                             | 6,407.                      |
| <b>23</b> Insurance   | 1,436,526.            | 1,372,826.                      | 63,700.                                |                             |
| <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> PRINTING & PUBLICATIONS  | 33,553,516.           | 33,488,778.                     | 1,258.                                 | 63,480.                     |
| <b>b</b> COMMISSION EXPENSE   | 24,380,143.           | 24,380,143.                     | 0.                                     |                             |
| <b>c</b> MEMBER REGIONAL EXPENSE  | 9,137,519.            | 9,055,587.                      | 78,812.                                | 3,120.                      |
| <b>d</b> BAD DEBTS  | 955,129.              | 945,729.                        | 9,400.                                 |                             |
| <b>e</b> All other expenses   | 932,760.              | 813,264.                        | -14,448.                               | 133,944.                    |
| <b>25</b> Total functional expenses. Add lines 1 through 24e  | 377,625,369.          | 367,441,432.                    | 8,569,710.                             | 1,614,227.                  |
| <b>26</b> Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.                                    |                       |                                 |  |                             |

Check here  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)<br>Beginning of year |              | (B)<br>End of year |
|--|--|--------------------------|--------------|--------------------|
| <b>Assets</b>  | <b>1</b> Cash - non-interest-bearing .....   | 18,024,531.              | <b>1</b>     | 13,797,031.        |
|  | <b>2</b> Savings and temporary cash investments .....  | 99,514,900.              | <b>2</b>     | 174,481,200.       |
|  | <b>3</b> Pledges and grants receivable, net .....  | 179,754.                 | <b>3</b>     | 104,762.           |
|  | <b>4</b> Accounts receivable, net .....  | 95,584,442.              | <b>4</b>     | 27,607,473.        |
|  | <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>     |                    |
|  | <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>     |                    |
|  | <b>7</b> Notes and loans receivable, net .....   | 0.                       | <b>7</b>     |                    |
|  | <b>8</b> Inventories for sale or use .....   | 0.                       | <b>8</b>     |                    |
|  | <b>9</b> Prepaid expenses and deferred charges .....   | 18,502,419.              | <b>9</b>     | 15,868,464.        |
|  | <b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....   | <b>10a</b> 149,140,010.  |              |                    |
|  | <b>b</b> Less: accumulated depreciation .....  | <b>10b</b> 113,739,494.  |              |                    |
|  | <b>11</b> Investments - publicly traded securities .....   | 34,926,962.              | <b>10c</b>   | 35,400,516.        |
|  | <b>12</b> Investments - other securities. See Part IV, line 11 .....   | 474,221,591.             | <b>11</b>    | 550,986,168.       |
|  | <b>13</b> Investments - program-related. See Part IV, line 11 .....  | 78,533,300.              | <b>12</b>    | 142,223,768.       |
|  | <b>14</b> Intangible assets .....  | 0.                       | <b>13</b>    | 0.                 |
|  | <b>15</b> Other assets. See Part IV, line 11 .....   | 0.                       | <b>14</b>    |                    |
| <b>16</b> <b>Total assets.</b> Add lines 1 through 15 (must equal line 33) ..... | 145,461.   | <b>15</b>                | 636,727.     |                    |
|  | 819,633,360.   | <b>16</b>                | 961,106,109. |                    |
| <b>Liabilities</b>   | <b>17</b> Accounts payable and accrued expenses .....  | 74,543,643.              | <b>17</b>    | 69,138,305.        |
|  | <b>18</b> Grants payable .....   |                          | <b>18</b>    |                    |
|  | <b>19</b> Deferred revenue .....   | 125,486,229.             | <b>19</b>    | 117,816,491.       |
|  | <b>20</b> Tax-exempt bond liabilities .....  |                          | <b>20</b>    |                    |
|  | <b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D .....  | 48,367,900.              | <b>21</b>    | 54,112,616.        |
|  | <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 .....     |                          | <b>22</b>    |                    |
|  | <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 .....  |                          | <b>25</b>    |                    |
|  | <b>26</b> <b>Total liabilities.</b> Add lines 17 through 25 .....  | 248,397,772.             | <b>26</b>    | 241,067,412.       |
| <b>Net Assets or Fund Balances</b>   | <b>Organizations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27, 28, 32, and 33.</b>  |                          |              |                    |
|  | <b>27</b> Net assets without donor restrictions .....  | 569,347,388.             | <b>27</b>    | 717,989,897.       |
|  | <b>28</b> Net assets with donor restrictions .....   | 1,888,200.               | <b>28</b>    | 2,048,800.         |
|  | <b>Organizations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>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 .....  | 571,235,588.             | <b>32</b>    | 720,038,697.       |
| <b>33</b> Total liabilities and net assets/fund balances .....                   | 819,633,360.   | <b>33</b>                | 961,106,109. |                    |

**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>  | 478,339,401. |
| <b>2</b>  | Total expenses (must equal Part IX, column (A), line 25)   | <b>2</b>  | 377,625,369. |
| <b>3</b>  | Revenue less expenses. Subtract line 2 from line 1   | <b>3</b>  | 100,714,032. |
| <b>4</b>  | Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))                      | <b>4</b>  | 571,235,588. |
| <b>5</b>  | Net unrealized gains (losses) on investments   | <b>5</b>  | 48,089,077.  |
| <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>  | 0.           |
| <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> | 720,038,697. |

**Part XII Financial Statements and Reporting**

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

- 1** Accounting method used to prepare the Form 990:  Cash  Accrual  Other \_\_\_\_\_  
If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.
- 2a** Were the organization's financial statements compiled or reviewed by an independent accountant? \_\_\_\_\_  
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:  
 Separate basis  Consolidated basis  Both consolidated and separate basis
- b** Were the organization's financial statements audited by an independent accountant? \_\_\_\_\_  
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:  
 Separate basis  Consolidated basis  Both consolidated and separate basis
- c** 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? \_\_\_\_\_  
If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.
- 3a** As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? \_\_\_\_\_
- 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 \_\_\_\_\_

|           | Yes | No |
|-----------|-----|----|
| <b>2a</b> |     | X  |
| <b>2b</b> | X   |    |
| <b>2c</b> | X   |    |
| <b>3a</b> |     | X  |
| <b>3b</b> |     |    |

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

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

**2020**

**Open to Public Inspection**

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

**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 or 990-EZ).)
- 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)(vi).** (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 1/3% 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 1/3% 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 in 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 |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
|                                    |          |   |   |    |   |   |
| <b>Total</b>                       |          |   |   |    |   |   |

**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) 2016 | (b) 2017 | (c) 2018 | (d) 2019 | (e) 2020 | (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) 2016 | (b) 2017 | (c) 2018 | (d) 2019 | (e) 2020 | (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) .....   |          |          |          |          | 12       |                          |
| <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 2020 (line 6, column (f), divided by line 11, column (f)) .....   | 14 | %                        |
| <b>15</b> Public support percentage from 2019 Schedule A, Part II, line 14 .....  | 15 | %                        |
| <b>16a 33 1/3% support test - 2020.</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 - 2019.</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 - 2020.</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 - 2019.</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) 2016     | (b) 2017     | (c) 2018     | (d) 2019     | (e) 2020     | (f) Total    |
|---|--------------|--------------|--------------|--------------|--------------|--------------|
| <b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....   | 2,798,660.   | 4,085,277.   | 4,112,115.   | 3,077,248.   | 1,941,201.   | 16,014,501.  |
| <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 ..... | 442,126,092. | 440,584,307. | 478,572,318. | 506,395,954. | 427,464,063. | 2295142734.  |
| <b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 .....   |              |              |              |              |              |              |
| <b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....  |              |              |              |              |              |              |
| <b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....  |              |              |              |              |              |              |
| <b>6 Total.</b> Add lines 1 through 5 .....   | 444,924,752. | 444,669,584. | 482,684,433. | 509,473,202. | 429,405,264. | 2311157235.  |
| <b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons .....  |              |              |              |              |              | 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 .....           | 63,732,683.  | 61,665,552.  | 66,855,103.  | 66,236,030.  | 64,148,435.  | 322,637,803. |
| <b>c</b> Add lines 7a and 7b .....  | 63,732,683.  | 61,665,552.  | 66,855,103.  | 66,236,030.  | 64,148,435.  | 322,637,803. |
| <b>8 Public support.</b> (Subtract line 7c from line 6.)  |              |              |              |              |              | 1988519432.  |

**Section B. Total Support**

| Calendar year (or fiscal year beginning in) ►  | (a) 2016     | (b) 2017     | (c) 2018     | (d) 2019     | (e) 2020     | (f) Total    |
|--|--------------|--------------|--------------|--------------|--------------|--------------|
| <b>9</b> Amounts from line 6 .....   | 444,924,752. | 444,669,584. | 482,684,433. | 509,473,202. | 429,405,264. | 2311157235.  |
| <b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources ..... | 21,005,160.  | 24,170,044.  | 27,004,872.  | 28,460,237.  | 26,664,112.  | 127,304,425. |
| <b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 .....                           |              |              |              |              |              |              |
| <b>c</b> Add lines 10a and 10b .....   | 21,005,160.  | 24,170,044.  | 27,004,872.  | 28,460,237.  | 26,664,112.  | 127,304,425. |
| <b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on .....      |              |              |              |              |              |              |
| <b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....                                  |              |              |              |              |              |              |
| <b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)   | 465,929,912. | 468,839,628. | 509,689,305. | 537,933,439. | 456,069,376. | 2438461660.  |

**14 First 5 years.** 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 **stop here**

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

|   |           |         |
|---|-----------|---------|
| <b>15</b> Public support percentage for 2020 (line 8, column (f), divided by line 13, column (f)) ..... | <b>15</b> | 81.55 % |
| <b>16</b> Public support percentage from 2019 Schedule A, Part III, line 15 .....                       | <b>16</b> | 94.99 % |

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

|   |           |        |
|---|-----------|--------|
| <b>17</b> Investment income percentage for <b>2020</b> (line 10c, column (f), divided by line 13, column (f)) ..... | <b>17</b> | 5.22 % |
| <b>18</b> Investment income percentage from <b>2019</b> Schedule A, Part III, line 17 .....                         | <b>18</b> | 5.01 % |

**19a 33 1/3% support tests - 2020.** 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 **stop here**. The organization qualifies as a publicly supported organization

**b 33 1/3% support tests - 2019.** 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 **stop here**. The organization qualifies as a publicly supported organization

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

**Part IV Supporting Organizations**

(Complete only if you checked a box in line 12 on 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 |
|--|-----|----|
| <b>1</b> 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>  |     |    |
| <b>2</b> 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>   |     |    |
| <b>3a</b> 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>   |     |    |
| <b>b</b> 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>   |     |    |
| <b>c</b> 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>  |     |    |
| <b>4a</b> 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>  |     |    |
| <b>b</b> 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>  |     |    |
| <b>c</b> 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>   |     |    |
| <b>5a</b> 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> |     |    |
| <b>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?   |     |    |
| <b>c Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?  |     |    |
| <b>6</b> 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>  |     |    |
| <b>7</b> 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 or 990-EZ).</i>  |     |    |
| <b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>  |     |    |
| <b>9a</b> 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>   |     |    |
| <b>b</b> Did one or more disqualified persons (as defined in 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>  |     |    |
| <b>c</b> Did a disqualified person (as defined in 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>   |     |    |
| <b>10a</b> 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>  |     |    |
| <b>b</b> 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 in lines 11b and 11c below, the governing body of a supported organization? |     |    |
| <b>11a</b>   |     |    |
| <b>b</b> A family member of a person described in line 11a above?  |     |    |
| <b>11b</b>   |     |    |
| <b>c</b> A 35% controlled entity of a person described in line 11a or 11b above? <i>If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI.</i>                              |     |    |
| <b>11c</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? <i>If "No," describe in Part VI 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.</i> |     |    |
| <b>1</b>  |     |    |
| <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? <i>If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.</i>   |     |    |
| <b>2</b>  |     |    |

**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)? <i>If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).</i> |     |    |
| <b>1</b>   |     |    |

**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>1</b>  |     |    |
| <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? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>   |     |    |
| <b>2</b>  |     |    |
| <b>3</b> By reason of the relationship described in 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? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>  |     |    |
| <b>3</b>  |     |    |

**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 line 2 below.  |  |  |  |
| <b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.   |  |  |  |
| <b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI 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? <i>If "Yes," then in Part VI 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.</i> |  |  |  |
| <b>2a</b>   |  |  |  |
| <b>b</b> Did the activities described in 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? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>  |  |  |  |
| <b>2b</b>   |  |  |  |
| <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? <i>If "Yes" or "No" provide details in Part VI.</i>   |  |  |  |
| <b>3a</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? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>   |  |  |  |
| <b>3b</b>   |  |  |  |

**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.

| Section A - Adjusted Net Income |  | (A) Prior Year | (B) Current Year (optional) |
|---------------------------------|--|----------------|-----------------------------|
| 1                               | Net short-term capital gain  | 1              |                             |
| 2                               | Recoveries of prior-year distributions   | 2              |                             |
| 3                               | Other gross income (see instructions)  | 3              |                             |
| 4                               | Add lines 1 through 3.   | 4              |                             |
| 5                               | Depreciation and depletion   | 5              |                             |
| 6                               | 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) | 6              |                             |
| 7                               | Other expenses (see instructions)  | 7              |                             |
| 8                               | <b>Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4)  | 8              |                             |

| Section B - Minimum Asset Amount |   | (A) Prior Year | (B) Current Year (optional) |
|----------------------------------|---|----------------|-----------------------------|
| 1                                | Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year): |                |                             |
| a                                | Average monthly value of securities   | 1a             |                             |
| b                                | Average monthly cash balances   | 1b             |                             |
| c                                | Fair market value of other non-exempt-use assets  | 1c             |                             |
| d                                | <b>Total</b> (add lines 1a, 1b, and 1c)   | 1d             |                             |
| e                                | <b>Discount</b> claimed for blockage or other factors ( <i>explain in detail in Part VI</i> ):                                  |                |                             |
| 2                                | Acquisition indebtedness applicable to non-exempt-use assets  | 2              |                             |
| 3                                | Subtract line 2 from line 1d.   | 3              |                             |
| 4                                | Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).                                  | 4              |                             |
| 5                                | Net value of non-exempt-use assets (subtract line 4 from line 3)  | 5              |                             |
| 6                                | Multiply line 5 by 0.035.   | 6              |                             |
| 7                                | Recoveries of prior-year distributions  | 7              |                             |
| 8                                | <b>Minimum Asset Amount</b> (add line 7 to line 6)  | 8              |                             |

| Section C - Distributable Amount |   |   | Current Year |
|----------------------------------|---|---|--------------|
| 1                                | Adjusted net income for prior year (from Section A, line 8, column A)   | 1 |              |
| 2                                | Enter 0.85 of line 1.   | 2 |              |
| 3                                | Minimum asset amount for prior year (from Section B, line 8, column A)  | 3 |              |
| 4                                | Enter greater of line 2 or line 3.  | 4 |              |
| 5                                | Income tax imposed in prior year  | 5 |              |
| 6                                | <b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).   | 6 |              |
| 7                                | <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). |   |              |

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

| Section D - Distributions |  | Current Year |
|---------------------------|--|--------------|
| 1                         | Amounts paid to supported organizations to accomplish exempt purposes  | 1            |
| 2                         | Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity      | 2            |
| 3                         | Administrative expenses paid to accomplish exempt purposes of supported organizations  | 3            |
| 4                         | Amounts paid to acquire exempt-use assets  | 4            |
| 5                         | Qualified set-aside amounts (prior IRS approval required - provide details in Part VI)   | 5            |
| 6                         | Other distributions (describe in Part VI). See instructions.   | 6            |
| 7                         | <b>Total annual distributions.</b> Add lines 1 through 6.  | 7            |
| 8                         | Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions. | 8            |
| 9                         | Distributable amount for 2020 from Section C, line 6   | 9            |
| 10                        | Line 8 amount divided by line 9 amount   | 10           |

| Section E - Distribution Allocations (see instructions) | (i)<br>Excess Distributions   | (ii)<br>Underdistributions<br>Pre-2020 | (iii)<br>Distributable<br>Amount for 2020 |
|---|---|--|---|
| 1   | Distributable amount for 2020 from Section C, line 6  |  |   |
| 2   | Underdistributions, if any, for years prior to 2020 (reasonable cause required - explain in Part VI). See instructions.   |  |   |
| 3   | Excess distributions carryover, if any, to 2020   |  |   |
| a   | From 2015   |  |   |
| b   | From 2016   |  |   |
| c   | From 2017   |  |   |
| d   | From 2018   |  |   |
| e   | From 2019   |  |   |
| f   | <b>Total</b> of lines 3a through 3e   |  |   |
| g   | Applied to underdistributions of prior years  |  |   |
| h   | Applied to 2020 distributable amount  |  |   |
| i   | Carryover from 2015 not applied (see instructions)  |  |   |
| j   | Remainder. Subtract lines 3g, 3h, and 3i from line 3f.  |  |   |
| 4   | Distributions for 2020 from Section D, line 7: \$   |  |   |
| a   | Applied to underdistributions of prior years  |  |   |
| b   | Applied to 2020 distributable amount  |  |   |
| c   | Remainder. Subtract lines 4a and 4b from line 4.  |  |   |
| 5   | Remaining underdistributions for years prior to 2020, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions. |  |   |
| 6   | Remaining underdistributions for 2020. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.                        |  |   |
| 7   | <b>Excess distributions carryover to 2021.</b> Add lines 3j and 4c.   |  |   |
| 8   | Breakdown of line 7:  |  |   |
| a   | Excess from 2016  |  |   |
| b   | Excess from 2017  |  |   |
| c   | Excess from 2018  |  |   |
| d   | Excess from 2019  |  |   |
| e   | Excess from 2020  |  |   |



**SCHEDULE C**  
**(Form 990 or 990-EZ)**

**Political Campaign and Lobbying Activities**

OMB No. 1545-0047

**2020**

**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 | INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS, INC. | Employer identification number | 13-1656633 |
|----------------------|---|--------------------------------|------------|

**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.
- 2 Political campaign activity expenditures ..... ▶ \$ \_\_\_\_\_
- 3 Volunteer hours for political campaign activities .....

**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-. |
|----------|-------------|---------|---|--|
|          |             |         |   |  |
|          |             |         |   |  |
|          |             |         |   |  |
|          |             |         |   |  |
|          |             |         |   |  |
|          |             |         |   |  |
|          |             |         |   |  |
|          |             |         |   |  |
|          |             |         |   |  |

**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) .....   | 144,769.  |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>c</b>   | Total lobbying expenditures (add lines 1a and 1b) .....   | 144,769.  |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>d</b>   | Other exempt purpose expenditures .....   | 367,873,047.                                    |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <b>e</b>   | Total exempt purpose expenditures (add lines 1c and 1d) .....   | 368,017,816.                                    |  |                    |                               |   |  |   |  |  |   |                   |              |  |  |
| <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<br>(or fiscal year beginning in)                      | (a) 2017   | (b) 2018   | (c) 2019   | (d) 2020   | (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<br>(150% of line 2a, column(e))    |            |            |            |            | 6,000,000. |
| <b>c</b> Total lobbying expenditures                                | 281,196.   | 147,474.   | 119,812.   | 144,769.   | 693,251.   |
| <b>d</b> Grassroots nontaxable amount                               | 250,000.   | 250,000.   | 250,000.   | 250,000.   | 1,000,000. |
| <b>e</b> Grassroots ceiling amount<br>(150% of line 2d, column (e)) |            |            |            |            | 1,500,000. |
| <b>f</b> Grassroots lobbying expenditures                           |            |            |            |            |            |



**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)).**

|   | (a) |    | (b)    |
|---|-----|----|--------|
|   | Yes | No | Amount |
| <i>For each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.</i>  |     |    |        |
| <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 expenditure 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

2020

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: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include total number at end of year, aggregate value of contributions, grants, and end of year, and two Yes/No questions about donor property and grant fund usage.

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

Form with multiple sections: 1. Purpose(s) of conservation easements (checkboxes for land, habitat, open space, historic area, structure). 2. Conservation contribution details (2a-2d table). 3-7. Monitoring and enforcement details. 8-9. Reporting requirements.

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 with sections 1a-1b and 2. 1a: Reporting on revenue and assets for public service. 1b: Reporting on revenue and assets for public service. 2: Reporting on revenue and assets for financial gain.

**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 |
|---------------------------------|--------|
| c Beginning balance             | 1c     |
| d Additions during the year     | 1d     |
| e Distributions during the year | 1e     |
| f Ending balance                | 1f     |
- 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 |
|--|------------------|----------------|--------------------|----------------------|---------------------|
| 1a Beginning of year balance                     |                  |                |                    |                      |                     |
| b Contributions                                  |                  |                |                    |                      |                     |
| c Net investment earnings, gains, and losses     |                  |                |                    |                      |                     |
| d Grants or scholarships                         |                  |                |                    |                      |                     |
| e Other expenditures for facilities and programs |                  |                |                    |                      |                     |
| f Administrative expenses                        |                  |                |                    |                      |                     |
| g End of year balance                            |                  |                |                    |                      |                     |

- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a Board designated or quasi-endowment  \_\_\_\_\_ %
  - b Permanent endowment  \_\_\_\_\_ %
  - c Term endowment  \_\_\_\_\_ %
- 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 |
|--|--------|----|
| (i) Unrelated organizations  | 3a(i)  |    |
| (ii) Related organizations   | 3a(ii) |    |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? | 3b     |    |
- 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 |
|--|--------------------------------------|---------------------------------|------------------------------|----------------|
| 1a Land  |                                      | 836,400.                        |                              | 836,400.       |
| b Buildings  |                                      | 37,577,226.                     | 27,848,427.                  | 9,728,799.     |
| c Leasehold improvements   |                                      | 1,208,649.                      | 897,062.                     | 311,587.       |
| d Equipment  |                                      | 109,517,735.                    | 84,994,005.                  | 24,523,730.    |
| e Other  |                                      |                                 |                              |                |
| <b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.) |                                      |                                 |                              | 35,400,516.    |

**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 (including name of security)      | (b) Book value | (c) Method of valuation: Cost or end-of-year market value |
|---|----------------|---|
| (1) Financial derivatives .....   |                |   |
| (2) Closely held equity interests .....                                   |                |   |
| (3) Other .....   |                |   |
| (A) COMMINGLED FUNDS  | 89,190,400.    | END-OF-YEAR MARKET VALUE                                  |
| (B) INVESTMENTS IN SUBSIDIARIES   | 53,033,368.    | COST  |
| (C)   |                |   |
| (D)   |                |   |
| (E)   |                |   |
| (F)   |                |   |
| (G)   |                |   |
| (H)   |                |   |
| <b>Total.</b> (Col. (b) must equal Form 990, Part X, col. (B) line 12.) ▶ | 142,223,768.   |   |

**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: Cost or end-of-year market value |
|---|----------------|---|
| (1)   |                |   |
| (2)   |                |   |
| (3)   |                |   |
| (4)   |                |   |
| (5)   |                |   |
| (6)   |                |   |
| (7)   |                |   |
| (8)   |                |   |
| (9)   |                |   |
| <b>Total.</b> (Col. (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.) ▶ |                |

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>  | 536,737,505. |
| <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> 48,089,073. |           |              |
| <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> 11,734,731. |           |              |
| <b>e</b> | Add lines <b>2a</b> through <b>2d</b>  |                       | <b>2e</b> | 59,823,804.  |
| <b>3</b> | Subtract line <b>2e</b> from line <b>1</b>   |                       | <b>3</b>  | 476,913,701. |
| <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> 1,425,700.  |           |              |
| <b>b</b> | Other (Describe in Part XIII.)   | <b>4b</b>             |           |              |
| <b>c</b> | Add lines <b>4a</b> and <b>4b</b>  |                       | <b>4c</b> | 1,425,700.   |
| <b>5</b> | Total revenue. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12.) |                       | <b>5</b>  | 478,339,401. |

**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>  | 403,651,935. |
| <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> 27,452,266. |           |              |
| <b>e</b> | Add lines <b>2a</b> through <b>2d</b>   |                       | <b>2e</b> | 27,452,266.  |
| <b>3</b> | Subtract line <b>2e</b> from line <b>1</b>  |                       | <b>3</b>  | 376,199,669. |
| <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> 1,425,700.  |           |              |
| <b>b</b> | Other (Describe in Part XIII.)  | <b>4b</b>             |           |              |
| <b>c</b> | Add lines <b>4a</b> and <b>4b</b>   |                       | <b>4c</b> | 1,425,700.   |
| <b>5</b> | Total expenses. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18.) |                       | <b>5</b>  | 377,625,369. |

**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.

PART IV, LINE 2B:

THE INSTITUTE HELD \$54,112,616 ON BEHALF OF IEEE FOUNDATION, INCORPORATED.

PART X, LINE 2:

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.

THE INSTITUTE FOLLOWS GUIDANCE THAT CLARIFIES THE ACCOUNTING FOR

**Part XIII** Supplemental Information (continued)

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,  
2020, AND 2019, MANAGEMENT HAS DETERMINED THAT THERE ARE NO SIGNIFICANT  
UNCERTAIN TAX POSITIONS THAT WOULD REQUIRE RECOGNITION OR DISCLOSURE IN  
THE ACCOMPANYING CONSOLIDATED FINANCIAL STATEMENTS.

PART XI, LINE 2D - OTHER ADJUSTMENTS:

|  |             |
|--|-------------|
| CONSOLIDATED AFFILIATES NET ELIMINATIONS | 11,550,087. |
| CONTRIBUTION EXPENSE RECLASS             | 184,644.    |
| TOTAL TO SCHEDULE D, PART XI, LINE 2D    | 11,734,731. |

PART XII, LINE 2D - OTHER ADJUSTMENTS:

|  |             |
|--|-------------|
| CONSOLIDATED AFFILIATES NET ELIMINATIONS | 27,267,622. |
| CONTRIBUTION EXPENSE RECLASS             | 184,644.    |
| TOTAL TO SCHEDULE D, PART XII, LINE 2D   | 27,452,266. |

**SCHEDULE F  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Statement of Activities Outside the United States**

▶ 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.

OMB No. 1545-0047

**2020**

Open to Public  
Inspection

|  |  |
|--|--|
| Name of the organization<br>INSTITUTE OF ELECTRICAL AND ELECTRONICS<br>ENGINEERS, INC. | Employer identification number<br>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 |
|---|-------------------------------------|--|--|--|--|
| CENTRAL AMERICA AND THE CARIBBEAN                       | 0                                   | 0  | PROGRAM SERVICES   | MEMBER & PUBLIC IMPERATIVES  | 36,923.  |
| CENTRAL AMERICA AND THE CARIBBEAN                       | 0                                   | 0  | PROGRAM SERVICES   | PERIODICALS  | 50.  |
| CENTRAL AMERICA AND THE CARIBBEAN                       | 0                                   | 0  | PROGRAM SERVICES   | CONFERENCES  | 142,858.   |
| CENTRAL AMERICA AND THE CARIBBEAN                       | 0                                   | 0  | PROGRAM SERVICES   | STANDARDS AND OTHERS   | 193,176.   |
| CENTRAL AMERICA AND THE CARIBBEAN                       | 0                                   | 0  | GRANTMAKING  |  | 1,814.   |
| EAST ASIA AND THE PACIFIC                               | 1                                   | 2  | PROGRAM SERVICES   | MEMBER & PUBLIC IMPERATIVES  | 634,153.   |
| EAST ASIA AND THE PACIFIC                               | 0                                   | 0  | PROGRAM SERVICES   | PERIODICALS  | 11,540.  |
| EAST ASIA AND THE PACIFIC                               | 0                                   | 0  | PROGRAM SERVICES   | CONFERENCES  | 7,905,353.   |
| <b>3 a</b> Subtotal .....                               | 1                                   | 2  |  |  | 8,925,867.   |
| <b>b</b> Total from continuation sheets to Part I ..... | 1                                   | 1  |  |  | 10,769,886.  |
| <b>c Totals</b> (add lines 3a and 3b) .....             | 2                                   | 3  |  |  | 19,695,753.  |

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

Schedule F (Form 990) 2020

**Part I** Continuation of Activities per Region. (Schedule F (Form 990), Part I, line 3)

| (a) Region                             | (b) Number of offices in the region | (c) Number of employees or agents in region | (d) Activities conducted in region (by type) (i.e., fundraising, program services, grants to recipients located in the region) | (e) If activity listed in (d) is a program service, describe specific type of service(s) in region | (f) Total expenditures for region |
|--|-------------------------------------|---|--|--|-----------------------------------|
| EAST ASIA AND THE PACIFIC              | 0                                   | 0   | PROGRAM SERVICES   | STANDARDS AND OTHERS   | 1,421,658.                        |
| EAST ASIA AND THE PACIFIC              | 0                                   | 0   | GRANTMAKING  |  | 444,317.                          |
| EUROPE (INCLUDING ICELAND & GREENLAND) | 0                                   | 0   | PROGRAM SERVICES   | MEMBER & PUBLIC IMPERATIVES  | 73,685.                           |
| EUROPE (INCLUDING ICELAND & GREENLAND) | 0                                   | 0   | PROGRAM SERVICES   | PERIODICALS  | 397.                              |
| EUROPE (INCLUDING ICELAND & GREENLAND) | 0                                   | 0   | PROGRAM SERVICES   | CONFERENCES  | 1,938,246.                        |
| EUROPE (INCLUDING ICELAND & GREENLAND) | 0                                   | 0   | PROGRAM SERVICES   | STANDARDS AND OTHERS   | 162,449.                          |
| EUROPE (INCLUDING ICELAND & GREENLAND) | 0                                   | 0   | GRANTMAKING  |  | 555,878.                          |
| MIDDLE EAST AND NORTH AFRICA           | 0                                   | 0   | PROGRAM SERVICES   | MEMBER & PUBLIC IMPERATIVES  | 122,720.                          |
| MIDDLE EAST AND NORTH AFRICA           | 0                                   | 0   | PROGRAM SERVICES   | PERIODICALS  | 4,786.                            |
| MIDDLE EAST AND NORTH AFRICA           | 0                                   | 0   | PROGRAM SERVICES   | CONFERENCES  | 307,095.                          |
| <b>Totals</b> .....                    |                                     |   |  |  |                                   |



**Part I** Continuation of Activities per Region. (Schedule F (Form 990), Part I, line 3)

| (a) Region                    | (b) Number of offices in the region | (c) Number of employees or agents in region | (d) Activities conducted in region (by type) (i.e., fundraising, program services, grants to recipients located in the region) | (e) If activity listed in (d) is a program service, describe specific type of service(s) in region | (f) Total expenditures for region |
|-------------------------------|-------------------------------------|---|--|--|-----------------------------------|
| MIDDLE EAST AND NORTH AFRICA  | 0                                   | 0   | PROGRAM SERVICES   | STANDARDS AND OTHERS   | 78,806.                           |
| MIDDLE EAST AND NORTH AFRICA  | 0                                   | 0   | GRANTMAKING  |  | 28,674.                           |
| NORTH AMERICA                 | 0                                   | 0   | PROGRAM SERVICES   | MEMBER & PUBLIC IMPERATIVES  | 54,968.                           |
| NORTH AMERICA                 | 0                                   | 0   | PROGRAM SERVICES   | CONFERENCES  | 3,133,360.                        |
| NORTH AMERICA                 | 1                                   | 1   | PROGRAM SERVICES   | STANDARDS AND OTHERS   | 230,653.                          |
| NORTH AMERICA                 | 0                                   | 0   | GRANTMAKING  |  | 137,893.                          |
| RUSSIA AND NEIGHBORING STATES | 0                                   | 0   | PROGRAM SERVICES   | MEMBER & PUBLIC IMPERATIVES  | 7,196.                            |
| RUSSIA AND NEIGHBORING STATES | 0                                   | 0   | PROGRAM SERVICES   | CONFERENCES  | 25,071.                           |
| RUSSIA AND NEIGHBORING STATES | 0                                   | 0   | PROGRAM SERVICES   | STANDARDS AND OTHERS   | 37,642.                           |
| RUSSIA AND NEIGHBORING STATES | 0                                   | 0   | GRANTMAKING  |  | 833.                              |
| <b>Totals</b> .....           |                                     |   |  |  |                                   |

**Part I** Continuation of Activities per Region. (Schedule F (Form 990), Part I, line 3)

| (a) Region          | (b) Number of offices in the region | (c) Number of employees or agents in region | (d) Activities conducted in region (by type) (i.e., fundraising, program services, grants to recipients located in the region) | (e) If activity listed in (d) is a program service, describe specific type of service(s) in region | (f) Total expenditures for region |
|---------------------|-------------------------------------|---|--|--|-----------------------------------|
| SOUTH AMERICA       | 0                                   | 0   | PROGRAM SERVICES   | MEMBER & PUBLIC IMPERATIVES  | 160,781.                          |
| SOUTH AMERICA       | 0                                   | 0   | PROGRAM SERVICES   | PERIODICALS  | 4,358.                            |
| SOUTH AMERICA       | 0                                   | 0   | PROGRAM SERVICES   | CONFERENCES  | 189,211.                          |
| SOUTH AMERICA       | 0                                   | 0   | PROGRAM SERVICES   | STANDARDS AND OTHERS   | 213,575.                          |
| SOUTH AMERICA       | 0                                   | 0   | GRANTMAKING  |  | 63,070.                           |
| SOUTH ASIA          | 0                                   | 0   | PROGRAM SERVICES   | MEMBER & PUBLIC IMPERATIVES  | 302,648.                          |
| SOUTH ASIA          | 0                                   | 0   | PROGRAM SERVICES   | PERIODICALS  | 3,889.                            |
| SOUTH ASIA          | 0                                   | 0   | PROGRAM SERVICES   | CONFERENCES  | 220,661.                          |
| SOUTH ASIA          | 0                                   | 0   | PROGRAM SERVICES   | STANDARDS AND OTHERS   | 376,764.                          |
| SOUTH ASIA          | 0                                   | 0   | GRANTMAKING  |  | 150,752.                          |
| <b>Totals</b> ..... |                                     |   |  |  |                                   |

**Part I** Continuation of Activities per Region. (Schedule F (Form 990), Part I, line 3)

| (a) Region          | (b) Number of offices in the region | (c) Number of employees or agents in region | (d) Activities conducted in region (by type) (i.e., fundraising, program services, grants to recipients located in the region) | (e) If activity listed in (d) is a program service, describe specific type of service(s) in region | (f) Total expenditures for region |
|---------------------|-------------------------------------|---|--|--|-----------------------------------|
| SUB-SAHARAN AFRICA  | 0                                   | 0   | PROGRAM SERVICES   | MEMBER & PUBLIC IMPERATIVES  | 81,332.                           |
| SUB-SAHARAN AFRICA  | 0                                   | 0   | PROGRAM SERVICES   | CONFERENCES  | 63,019.                           |
| SUB-SAHARAN AFRICA  | 0                                   | 0   | PROGRAM SERVICES   | STANDARDS AND OTHERS   | 101,177.                          |
| SUB-SAHARAN AFRICA  | 0                                   | 0   | GRANTMAKING  |  | 72,322.                           |
|                     |                                     |   |  |  |                                   |
|                     |                                     |   |  |  |                                   |
|                     |                                     |   |  |  |                                   |
|                     |                                     |   |  |  |                                   |
|                     |                                     |   |  |  |                                   |
|                     |                                     |   |  |  |                                   |
| <b>Totals</b> ..... | 1                                   | 1   |  |  | 10,769,886.                       |

**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.

| 1<br>(a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region                             | (d) Purpose of grant          | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of noncash assistance | (h) Description of noncash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|-------------------------------|--|--|-------------------------------|--------------------------|---------------------------------|----------------------------------|---------------------------------------|---|
|                               |  | EAST ASIA AND THE PACIFIC              | ENGINEERING ACHIEVEMENT AWARD | 38,029.                  | CHECK                           | 0.                               | N/A                                   | N/A   |
|                               |  | EAST ASIA AND THE PACIFIC              | ENGINEERING DEVELOPMENT       | 85,440.                  | WIRE                            | 0.                               | N/A                                   | N/A   |
|                               |  | EAST ASIA AND THE PACIFIC              | ENGINEERING FELLOWSHIP        | 15,000.                  | WIRE                            | 0.                               | N/A                                   | N/A   |
|                               |  | EUROPE (INCLUDING ICELAND & GREENLAND) | ENGINEERING ACHIEVEMENT AWARD | 10,000.                  | WIRE                            | 0.                               | N/A                                   | N/A   |
|                               |  | EUROPE (INCLUDING ICELAND & GREENLAND) | ENGINEERING DEVELOPMENT       | 198,187.                 | WIRE                            | 0.                               | N/A                                   | N/A   |
|                               |  | NORTH AMERICA                          | ENGINEERING DEVELOPMENT       | 40,000.                  | WIRE                            | 0.                               | N/A                                   | N/A   |
|                               |  | NORTH AMERICA                          | ENGINEERING FELLOWSHIP        | 15,000.                  | WIRE                            | 0.                               | N/A                                   | N/A   |
|                               |  | SOUTH AMERICA                          | ENGINEERING DEVELOPMENT       | 35,000.                  | WIRE                            | 0.                               | N/A                                   | N/A   |

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 ..... ► 25

3 Enter total number of other organizations or entities ..... ► 1

| <b>Part II</b> Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States. (Schedule F (Form 990), Part II, line 1) |   |                              |                             |                                 |  |  |   |  |
|---|---|------------------------------|-----------------------------|---------------------------------|--|--|---|--|
| <b>1</b><br><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 non-cash assistance | <b>(h)</b> Description of non-cash assistance | <b>(i)</b> Method of valuation (book, FMV, appraisal, other) |
|   |   | SOUTH ASIA                   | ENGINEERING DEVELOPMENT     | 14,280.                         | WIRE                                   | 0.                                       | N/A   | N/A  |
|   |   | SUB-SAHARAN AFRICA           | ENGINEERING DEVELOPMENT     | 9,600.                          | WIRE                                   | 0.                                       | N/A   | N/A  |
|   |   | MIDDLE EAST AND NORTH AFRICA | ENGINEERING DEVELOPMENT     | 10,000.                         | WIRE                                   | 0.                                       | N/A   | N/A  |
|   |   |                              |                             |                                 |  |  |   |  |
|   |   |                              |                             |                                 |  |  |   |  |
|   |   |                              |                             |                                 |  |  |   |  |
|   |   |                              |                             |                                 |  |  |   |  |
|   |   |                              |                             |                                 |  |  |   |  |
|   |   |                              |                             |                                 |  |  |   |  |
|   |   |                              |                             |                                 |  |  |   |  |
|   |   |                              |                             |                                 |  |  |   |  |
|   |   |                              |                             |                                 |  |  |   |  |

**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) |
|---------------------------------|---|--------------------------|--------------------------|---------------------------------|----------------------------------|---------------------------------------|---|
| ENGINEERING ACHIEVEMENT AWARD   | EAST ASIA AND THE PACIFIC - AUSTRALIA, BRUNEI, BURMA,             | 310                      | 134,295.                 | CHECKS; WIRE TRANSFERS          | 0.                               | N/A                                   | N/A   |
| ENGINEERING ACHIEVEMENT AWARD   | EUROPE (INCLUDING ICELAND & GREENLAND) - ALBANIA, ANDORRA,        | 204                      | 153,840.                 | CHECKS; WIRE TRANSFERS          | 0.                               | N/A                                   | N/A   |
| ENGINEERING ACHIEVEMENT AWARD   | MIDDLE EAST AND NORTH AFRICA - ALGERIA, BAHRAIN, DJIBOUTI, EGYPT, | 18                       | 12,656.                  | CHECKS; WIRE TRANSFERS          | 0.                               | N/A                                   | N/A   |
| ENGINEERING ACHIEVEMENT AWARD   | NORTH AMERICA - CANADA AND MEXICO, BUT NOT THE UNITED STATES      | 91                       | 29,914.                  | CHECKS; WIRE TRANSFERS          | 0.                               | N/A                                   | N/A   |
| ENGINEERING ACHIEVEMENT AWARD   | RUSSIA AND NEIGHBORING STATES - ARMENIA, AZERBIJAN,               | 2                        | 833.                     | CHECKS                          | 0.                               | N/A                                   | N/A   |
| ENGINEERING ACHIEVEMENT AWARD   | SOUTH AMERICA - ARGENTINA, BOLIVIA, BRAZIL, CHILE, COLUMBIA,      | 18                       | 7,771.                   | CHECKS; WIRE TRANSFERS          | 0.                               | N/A                                   | N/A   |
| ENGINEERING ACHIEVEMENT AWARD   | SOUTH ASIA - AFGHANISTAN, BANGLADESH, BHUTAN, INDIA,              | 74                       | 32,394.                  | CHECKS; WIRE TRANSFERS          | 0.                               | N/A                                   | N/A   |
| ENGINEERING ACHIEVEMENT AWARD   | SUB-SAHARAN AFRICA - ANGOLA, BENIN, BOTSWANA, BURKINA FASO,       | 4                        | 1,400.                   | CHECKS; WIRE TRANSFERS          | 0.                               | N/A                                   | N/A   |
| ENGINEERING DEVELOPMENT         | EAST ASIA AND THE PACIFIC - AUSTRALIA, BRUNEI, BURMA,             | 55                       | 36,873.                  | CHECKS; WIRE TRANSFERS          | 0.                               | N/A                                   | N/A   |

| <b>Part III</b> Continuation of Grants and Other Assistance to Individuals Outside the United States. (Schedule F (Form 990), Part III) |   |                          |                          |                                 |                                   |  |   |
|---|---|--------------------------|--------------------------|---------------------------------|-----------------------------------|--|---|
| (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 non-cash assistance | (g) Description of non-cash assistance | (h) Method of valuation (book, FMV, appraisal, other) |
| ENGINEERING DEVELOPMENT   | EUROPE (INCLUDING ICELAND & GREENLAND) - ALBANIA, ANDORRA,        | 43                       | 61,486.                  | CHECKS; WIRE TRANSFERS          | 0.                                | N/A                                    | N/A   |
| ENGINEERING DEVELOPMENT   | MIDDLE EAST AND NORTH AFRICA - ALGERIA, BAHRAIN, DJIBOUTI, EGYPT, | 4                        | 2,072.                   | CHECKS                          | 0.                                | N/A                                    | N/A   |
| ENGINEERING DEVELOPMENT   | NORTH AMERICA - CANADA AND MEXICO, BUT NOT THE UNITED STATES      | 5                        | 3,706.                   | CHECKS                          | 0.                                | N/A                                    | N/A   |
| ENGINEERING DEVELOPMENT   | SOUTH AMERICA - ARGENTINA, BOLIVIA, BRAZIL, CHILE, COLUMBIA,      | 9                        | 13,116.                  | CHECKS; WIRE TRANSFERS          | 0.                                | N/A                                    | N/A   |
| ENGINEERING DEVELOPMENT   | SOUTH ASIA - AFGHANISTAN, BANGLADESH, BHUTAN, INDIA,              | 39                       | 22,900.                  | CHECKS; WIRE TRANSFERS          | 0.                                | N/A                                    | N/A   |
| ENGINEERING FELLOWSHIP  | EAST ASIA AND THE PACIFIC - AUSTRALIA, BRUNEI, BURMA,             | 5                        | 24,000.                  | WIRES                           | 0.                                | N/A                                    | N/A   |
| ENGINEERING FELLOWSHIP  | EUROPE (INCLUDING ICELAND & GREENLAND) - ALBANIA, ANDORRA,        | 4                        | 21,250.                  | WIRES                           | 0.                                | N/A                                    | N/A   |
| ENGINEERING FELLOWSHIP  | NORTH AMERICA - CANADA AND MEXICO, BUT NOT THE UNITED STATES      | 2                        | 12,000.                  | WIRES                           | 0.                                | N/A                                    | N/A   |
| ENGINEERING SCHOLARSHIP   | EAST ASIA AND THE PACIFIC - AUSTRALIA, BRUNEI, BURMA,             | 12                       | 7,847.                   | CHECKS; WIRE TRANSFERS          | 0.                                | N/A                                    | N/A   |

**Part III** Continuation of Grants and Other Assistance to Individuals Outside the United States. (Schedule F (Form 990), Part III)

| (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 non-cash assistance | (g) Description of non-cash assistance | (h) Method of valuation (book, FMV, appraisal, other) |
|---------------------------------|---|--------------------------|--------------------------|---------------------------------|-----------------------------------|--|---|
| ENGINEERING SCHOLARSHIP         | EUROPE (INCLUDING ICELAND & GREENLAND) - ALBANIA, ANDORRA,        | 4                        | 6,000.                   | CHECKS; WIRE TRANSFERS          | 0.                                | N/A                                    | N/A   |
| ENGINEERING SCHOLARSHIP         | MIDDLE EAST AND NORTH AFRICA - ALGERIA, BAHRAIN, DJIBOUTI, EGYPT, | 1                        | 1,000.                   | CHECKS                          | 0.                                | N/A                                    | N/A   |
| ENGINEERING SCHOLARSHIP         | SOUTH ASIA - AFGHANISTAN, BANGLADESH, BHUTAN, INDIA,              | 33                       | 32,149.                  | WIRES                           | 0.                                | N/A                                    | N/A   |
| ENGINEERING SCHOLARSHIP         | NORTH AMERICA - CANADA AND MEXICO, BUT NOT THE UNITED STATES      | 1                        | 1,000.                   | CHECKS                          | 0.                                | N/A                                    | N/A   |
|                                 |   |                          |                          |                                 |                                   |  |   |
|                                 |   |                          |                          |                                 |                                   |  |   |
|                                 |   |                          |                          |                                 |                                   |  |   |
|                                 |   |                          |                          |                                 |                                   |  |   |
|                                 |   |                          |                          |                                 |                                   |  |   |
|                                 |   |                          |                          |                                 |                                   |  |   |
|                                 |   |                          |                          |                                 |                                   |  |   |



**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 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.

PART I, LINE 2:

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 G**  
(Form 990 or 990-EZ)

**Supplemental Information Regarding Fundraising or Gaming Activities**

OMB No. 1545-0047

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.

**2020**

▶ Attach to Form 990 or Form 990-EZ.

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

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

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

**Part I Fundraising Activities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

**1** Indicate whether the organization raised funds through any of the following activities. Check all that apply.

- a  Mail solicitations
- b  Internet and email solicitations
- c  Phone solicitations
- d  In-person solicitations
- e  Solicitation of non-government grants
- f  Solicitation of government grants
- g  Special fundraising events

**2 a** Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?  **Yes**  **No**

**b** If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

| (i) Name and address of individual or entity (fundraiser)  | (ii) Activity          | (iii) Did fundraiser have custody or control of contributions? |    | (iv) Gross receipts from activity | (v) Amount paid to (or retained by) fundraiser listed in col. (i) | (vi) Amount paid to (or retained by) organization |
|--|------------------------|--|----|-----------------------------------|---|---|
|  |                        | Yes  | No |                                   |   |   |
| DONALD A CAMPBELL AND COMPANY<br>- ONE E WACKER DR, SUITE  | FUNDRAISING CONSULTANT |  | X  | 0.                                | 37,974.   | -37,974.  |
| KELLY BROOKS TANNEN - 6663<br>WAYNE AVE, PHILADELPHIA, PA  | FUNDRAISING MATERIALS  |  | X  | 0.                                | 10,158.   | -10,158.  |
| RAISE WELL LLC - 42956 DEER<br>CHASE PL, ASHBURN, VA 20147 | MARKETING MATERIALS    |  | X  | 0.                                | 5,600.  | -5,600.   |
|  |                        |  |    |                                   |   |   |
|  |                        |  |    |                                   |   |   |
|  |                        |  |    |                                   |   |   |
|  |                        |  |    |                                   |   |   |
|  |                        |  |    |                                   |   |   |
|  |                        |  |    |                                   |   |   |
|  |                        |  |    |                                   |   |   |
|  |                        |  |    |                                   |   |   |
| <b>Total</b>   |                        |  |    |                                   | 53,732.   | -53,732.  |

**3** List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

AR, CA, FL, HI, IL, IN, KS, KY, MA, MD, MN, MS, NC, ND, NH, NJ, NY, PA, RI, SC, TN, UT, VA, WV

**Part II Fundraising Events.** Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

|                 |    | (a) Event #1   | (b) Event #2 | (c) Other events | (d) Total events<br>(add col. (a) through<br>col. (c)) |
|-----------------|----|--|--------------|------------------|--|
|                 |    | (event type)   | (event type) | (total number)   |  |
| Revenue         | 1  | Gross receipts .....   |              |                  |  |
|                 | 2  | Less: Contributions .....  |              |                  |  |
|                 | 3  | Gross income (line 1 minus line 2) .....                           |              |                  |  |
| Direct Expenses | 4  | Cash prizes .....  |              |                  |  |
|                 | 5  | Noncash prizes .....   |              |                  |  |
|                 | 6  | Rent/facility costs .....  |              |                  |  |
|                 | 7  | Food and beverages .....   |              |                  |  |
|                 | 8  | Entertainment .....  |              |                  |  |
|                 | 9  | Other direct expenses .....  |              |                  |  |
|                 | 10 | Direct expense summary. Add lines 4 through 9 in column (d) .....  |              |                  |  |
|                 | 11 | Net income summary. Subtract line 10 from line 3, column (d) ..... |              |                  |  |

**Part III Gaming.** Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

|                 |   | (a) Bingo  | (b) Pull tabs/instant<br>bingo/progressive bingo                    | (c) Other gaming  | (d) Total gaming (add<br>col. (a) through col. (c))                 |
|-----------------|---|--|---|---|---|
|                 |   |  |   |   |   |
| Revenue         | 1 | Gross revenue .....  |   |   |   |
| Direct Expenses | 2 | Cash prizes .....  |   |   |   |
|                 | 3 | Noncash prizes .....   |   |   |   |
|                 | 4 | Rent/facility costs .....  |   |   |   |
|                 | 5 | Other direct expenses .....  |   |   |   |
|                 | 6 | Volunteer labor .....  | <input type="checkbox"/> Yes _____ %<br><input type="checkbox"/> No | <input type="checkbox"/> Yes _____ %<br><input type="checkbox"/> No | <input type="checkbox"/> Yes _____ %<br><input type="checkbox"/> No |
|                 | 7 | Direct expense summary. Add lines 2 through 5 in column (d) .....        |   |   |   |
|                 | 8 | Net gaming income summary. Subtract line 7 from line 1, column (d) ..... |   |   |   |

9 Enter the state(s) in which the organization conducts gaming activities: \_\_\_\_\_  
 a Is the organization licensed to conduct gaming activities in each of these states?  Yes  No  
 b If "No," explain: \_\_\_\_\_

10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year?  Yes  No  
 b If "Yes," explain: \_\_\_\_\_

11 Does the organization conduct gaming activities with nonmembers?  Yes  No

12 Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming?  Yes  No

13 Indicate the percentage of gaming activity conducted in:

|                               |     |   |
|-------------------------------|-----|---|
| a The organization's facility | 13a | % |
| b An outside facility         | 13b | % |

14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name ▶ \_\_\_\_\_

Address ▶ \_\_\_\_\_

15a Does the organization have a contract with a third party from whom the organization receives gaming revenue?  Yes  No

b If "Yes," enter the amount of gaming revenue received by the organization ▶ \$ \_\_\_\_\_ and the amount of gaming revenue retained by the third party ▶ \$ \_\_\_\_\_

c If "Yes," enter name and address of the third party:

Name ▶ \_\_\_\_\_

Address ▶ \_\_\_\_\_

16 Gaming manager information:

Name ▶ \_\_\_\_\_

Gaming manager compensation ▶ \$ \_\_\_\_\_

Description of services provided ▶ \_\_\_\_\_

Director/officer  Employee  Independent contractor

17 Mandatory distributions:

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?  Yes  No

b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ \$ \_\_\_\_\_

**Part IV Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

SCHEDULE G, PART I, LINE 2B, LIST OF TEN HIGHEST PAID FUNDRAISERS:

(I) NAME OF FUNDRAISER: DONALD A CAMPBELL AND COMPANY

(I) ADDRESS OF FUNDRAISER: ONE E WACKER DR, SUITE 2100, CHICAGO, IL 60601

(I) NAME OF FUNDRAISER: KELLY BROOKS TANNEN

(I) ADDRESS OF FUNDRAISER: 6663 WAYNE AVE, PHILADELPHIA, PA 19119

**Part IV** Supplemental Information *(continued)*

THE PROFESSIONAL FUNDRAISERS REPORTED IN SCHEDULE G, PART I, ASSIST

IEEE IN DEVELOPING FUNDRAISING STRATEGIES. IEEE DOES NOT TRACK

DONATIONS TO ANY SPECIFIC FUNDRAISER OR FUNDRAISING STRATEGY, AND HAS

THEREFORE OPTED TO REPORT \$0 REVENUE RAISED, RATHER THAN ESTIMATE FUNDS

TO ALLOCATE TO EACH FUNDRAISER.

**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

**2020**

**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.

| <b>1 (a)</b> Name and address of organization or government  | <b>(b)</b> EIN | <b>(c)</b> IRC section (if applicable) | <b>(d)</b> Amount of cash grant | <b>(e)</b> Amount of non-cash assistance | <b>(f)</b> Method of valuation (book, FMV, appraisal, other) | <b>(g)</b> Description of noncash assistance | <b>(h)</b> Purpose of grant or assistance |
|--|----------------|--|---------------------------------|--|--|--|---|
| IEEE FOUNDATION INC<br>445 HOES LANE<br>PISCATAWAY, NJ 08854   | 23-1710664     | 501(C)(3)                              | 2,301,371.                      | 0.                                       | N/A  | N/A  | ENGINEERING DEVELOPMENT                   |
| AFCCE SCHOLARSHIP FUND<br>PO BOX 19333<br>WASHINGTON, DC 20036   | 52-1126368     | 501(C)(6)                              | 20,000.                         | 0.                                       | N/A  | N/A  | ENGINEERING DEVELOPMENT                   |
| AMERICAN AUTOMATIC CONTROL COUNCIL<br>UW EE & CE, BOX 352500<br>SEATTLE, WA 98195                            | 11-6017940     | 501(C)(3)                              | 10,000.                         | 0.                                       | N/A  | N/A  | ENGINEERING DEVELOPMENT                   |
| ARIZONA STATE UNIVERSITY<br>FOUNDATION FOR A NEW AMERICAN<br>UNIVERSITY - P.O. BOX 2260 -<br>TEMPE, AZ 85260 | 86-6051042     | 501(C)(3)                              | 14,000.                         | 0.                                       | N/A  | N/A  | ENGINEERING DEVELOPMENT                   |
| AUGMENTEDREALITY.ORG<br>3855 SW 153RD DRIVE<br>BEAVERTON, OR 97003   | 46-0772775     | 501(C)(3)                              | 5,200.                          | 0.                                       | N/A  | N/A  | ENGINEERING DEVELOPMENT                   |
| CAMBRIDGE INNOVATION INSTITUTE<br>250 FIRST AVE, SUITE 300<br>NEEHMAN, MA 02494                              | 82-5319814     | 501(C)(3)                              | 10,000.                         | 0.                                       | N/A  | N/A  | ENGINEERING DEVELOPMENT                   |

- 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.**

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

Schedule I (Form 990) 2020

**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

| (a) Name and address of organization or government   | (b) EIN    | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance |
|--|------------|-------------------------------|--------------------------|-----------------------------------|---|--|------------------------------------|
| CARNEGIE MELLON UNIVERSITY<br>5000 FORBES AVE.<br>PITTSBURGH, PA 15213   | 25-0969449 | 501(C)(3)                     | 9,780.                   | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |
| GEORGETOWN UNIVERSITY<br>37TH AND O STREETS, NW<br>WASHINGTON, DC 20057  | 53-0196603 | 501(C)(3)                     | 100,000.                 | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |
| GEORGIA TECH RESEARCH CORPORATION<br>926 DALNEY ST. NW, 4TH FLOOR<br>ATLANTA, GA 30318                         | 58-0603146 | 501(C)(3)                     | 12,000.                  | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |
| INTERNATIONAL COUNCIL ON SYSTEMS<br>ENGINEERING - 7670 OPPORTUNITY<br>ROAD, SUITE 220 - SAN DIEGO, CA<br>92111 | 77-0294074 | 501(C)(3)                     | 22,000.                  | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |
| LOUISIANA STATE UNIVERSITY<br>200 FREY COMPUTING SER<br>BATON ROUGE, LA 70803                                  | 72-6000848 | 501(C)(3)                     | 17,712.                  | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |
| MASSACHUSETTS INSTI OF TECHNOLOGY<br>77 MASSACHUSETTS AVE<br>CAMBRIDGE, MA 02139                               | 04-2103594 | 501(C)(3)                     | 75,000.                  | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |
| NATIONAL ELECTRONICS MUSEUM, INC.<br>PO BOX 1693, MS 4015<br>BALTIMORE, MD 21203                               | 52-1226197 | 501(C)(3)                     | 15,000.                  | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |
| NORTHERN ARIZONA UNIVERSITY<br>PO BOX 4069<br>FLAGSTAFF, AZ 86011  | 74-2579628 | 501(C)(3)                     | 14,977.                  | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |
| NOVA SOUTHEASTERN UNIVERSITY, INC.<br>3301 COLLEGE AVE.<br>FORT LAUDERDALE, FL 33314                           | 59-1083502 | 501(C)(3)                     | 13,750.                  | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |



**Part II** Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)

| (a) Name and address of organization or government  | (b) EIN    | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance |
|---|------------|-------------------------------|--------------------------|-----------------------------------|---|--|------------------------------------|
| OAKLAND UNIVERSITY<br>2200 N. SQUIRREL ROAD<br>ROCHESTER, MI 48309                                  | 38-1714400 | 501(C)(3)                     | 10,000.                  | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |
| REGENTS OF THE UNIVERSITY OF MINNESOTA - NW 5960, PO BOX 1450 - MINNEAPOLIS, MN 55485               | 41-6007513 | 501(C)(3)                     | 10,000.                  | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |
| REGIS UNIVERSITY<br>3333 REGIS BOULEVARD<br>DENVER, CO 80221  | 84-0402707 | 501(C)(3)                     | 35,190.                  | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |
| ROCHESTER INSTITUTE OF TECHNOLOGY<br>2275 NATHANIEL ROCHESTER HALL<br>ROCHESTER, NY 14623           | 16-0743140 | 501(C)(3)                     | 10,000.                  | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |
| TEXAS A AND M ENGINEERING EXPERIMENT STATION - FISCAL OFFICE, 3124 TAMU - COLLEGE STATION, TX 77843 | 74-1974733 | 501(C)(3)                     | 36,000.                  | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |
| THE UNIVERSITY OF TEXAS AT AUSTIN<br>110 INNER CIRCLE CAMPUS DRIVE<br>AUSTIN, TX 78712              | 74-6000203 | 501(C)(3)                     | 20,000.                  | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |
| TRUSTEES OF THE STEVENS INSTITUTE OF TECHNOLOGY - CASTLE POINT ON HUDSON - HOBOKEN, NJ 07030        | 22-1487354 | 501(C)(3)                     | 10,000.                  | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |
| UNIVERSITY OF NEW MEXICO ELECTRICAL & COMPUTER ENGINEERING, MSC01 1100 - ALBUQUERQUE, NM 87131      | 85-6000642 | 501(C)(3)                     | 19,250.                  | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |
| WICHITA STATE UNIVERSITY<br>1845 FAIRMOUNT ST., BOX 136<br>WICHITA, KS 67260                        | 48-1124839 | 501(C)(3)                     | 15,000.                  | 0.                                | N/A   | N/A                                    | ENGINEERING DEVELOPMENT            |

**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 non-cash assistance | (e) Method of valuation (book, FMV, appraisal, other) | (f) Description of noncash assistance |
|---------------------------------|--------------------------|--------------------------|-----------------------------------|---|---------------------------------------|
| ENGINEERING ACHIEVEMENT AWARD   | 345                      | 351,379.                 | 0.                                | N/A   | N/A                                   |
| ENGINEERING DEVELOPMENT         | 61                       | 58,637.                  | 0.                                | N/A   | N/A                                   |
| ENGINEERING FELLOWSHIP          | 23                       | 396,000.                 | 0.                                | N/A   | N/A                                   |
| ENGINEERING SCHOLARSHIP         | 21                       | 22,250.                  | 0.                                | N/A   | N/A                                   |

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

PART I, LINE 2:

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 J  
(Form 990)**

**Compensation Information**

OMB No. 1545-0047

**2020**

Open to Public Inspection

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.

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 Questions Regarding Compensation**

**1a** 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.

- |   |  |
|---|--|
| <input checked="" type="checkbox"/> First-class or charter travel             | <input type="checkbox"/> Housing allowance or residence for personal use   |
| <input checked="" type="checkbox"/> Travel for companions                     | <input type="checkbox"/> Payments for business use of personal residence   |
| <input checked="" type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees     |
| <input type="checkbox"/> Discretionary spending account                       | <input type="checkbox"/> Personal services (such as maid, chauffeur, chef) |

**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 .....

**2** 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? .....

**3** 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.

- |   |   |
|---|---|
| <input checked="" type="checkbox"/> Compensation committee              | <input type="checkbox"/> Written employment contract                                |
| <input checked="" type="checkbox"/> Independent compensation consultant | <input checked="" type="checkbox"/> Compensation survey or study                    |
| <input checked="" type="checkbox"/> Form 990 of other organizations     | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

**4** 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:

- a** Receive a severance payment or change-of-control payment? .....
- b** Participate in or receive payment from a supplemental nonqualified retirement plan? .....
- c** Participate in or receive payment from an equity-based compensation arrangement? .....
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

**Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.**

**5** 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:

- a** The organization? .....
- b** Any related organization? .....
- If "Yes" on line 5a or 5b, describe in Part III.

**6** 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:

- a** The organization? .....
- b** Any related organization? .....
- If "Yes" on line 6a or 6b, describe in Part III.

**7** 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 .....

**8** 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 .....

**9** If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? .....

|           | Yes | No |
|-----------|-----|----|
| <b>1b</b> | X   |    |
| <b>2</b>  | X   |    |
| <b>4a</b> |     | X  |
| <b>4b</b> | X   |    |
| <b>4c</b> |     | X  |
| <b>5a</b> | X   |    |
| <b>5b</b> |     | X  |
| <b>6a</b> |     | X  |
| <b>6b</b> |     | X  |
| <b>7</b>  | X   |    |
| <b>8</b>  |     | X  |
| <b>9</b>  |     |    |

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

Schedule J (Form 990) 2020

**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 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 |  |                         |                                 |   |
| (1) STEPHEN WELBY<br>ASST. SECRETARY & EXEC DIRECTOR                | (i)  | 635,012.   | 190,000.                            | 119,199.                            | 202,493.                                       | 1,600.                  | 1,148,304.                      | 60,000.   |
|   | (ii) | 0.   | 0.                                  | 0.                                  | 0.   | 0.                      | 0.                              | 0.  |
| (2) MARY WARD-CALLAN<br>MANAGING DIRECTOR TECH ACTIVITIES           | (i)  | 396,659.   | 107,300.                            | 71,560.                             | 37,500.  | 15,902.                 | 628,921.                        | 0.  |
|   | (ii) | 0.   | 0.                                  | 0.                                  | 0.   | 0.                      | 0.                              | 0.  |
| (3) KONSTANTINOS KARACHALIOS<br>MANAGING DIRECTOR IEEE STANDARDS    | (i)  | 404,736.   | 63,690.                             | 43,636.                             | 37,500.  | 0.                      | 549,562.                        | 0.  |
|   | (ii) | 0.   | 0.                                  | 0.                                  | 0.   | 0.                      | 0.                              | 0.  |
| (4) THOMAS R. SIEGERT<br>ASST. TREASURER & CFO                      | (i)  | 428,141.   | 51,720.                             | 21,059.                             | 37,500.  | 10,146.                 | 548,566.                        | 0.  |
|   | (ii) | 0.   | 0.                                  | 0.                                  | 0.   | 0.                      | 0.                              | 0.  |
| (5) SOPHIA MUIRHEAD<br>GENERAL COUNSEL & CCO                        | (i)  | 410,780.   | 38,250.                             | 12,913.                             | 30,638.  | 16,721.                 | 509,302.                        | 0.  |
|   | (ii) | 0.   | 0.                                  | 0.                                  | 0.   | 0.                      | 0.                              | 0.  |
| (6) EMILY CSERNICA<br>DIRECTOR NORTH AMERICAN SALES                 | (i)  | 118,845.   | 302,945.                            | 30,897.                             | 30,638.  | 9,200.                  | 492,525.                        | 0.  |
|   | (ii) | 0.   | 0.                                  | 0.                                  | 0.   | 0.                      | 0.                              | 0.  |
| (7) PAUL CANNING<br>REGIONAL SALES MANAGER EMEA                     | (i)  | 146,835.   | 241,815.                            | 52,099.                             | 37,500.  | 11,536.                 | 489,785.                        | 0.  |
|   | (ii) | 0.   | 0.                                  | 0.                                  | 0.   | 0.                      | 0.                              | 0.  |
| (8) FRANCIS STAPLES<br>SN DIRECTOR GLOBAL SALES & CUST OPS          | (i)  | 202,187.   | 204,140.                            | 34,292.                             | 37,500.  | 10,414.                 | 488,533.                        | 0.  |
|   | (ii) | 0.   | 0.                                  | 0.                                  | 0.   | 0.                      | 0.                              | 0.  |
| (9) DONNA HOURICAN<br>STAFF EXECUTIVE CORP ACTIVITIES               | (i)  | 327,807.   | 84,000.                             | 25,832.                             | 37,500.  | 0.                      | 475,139.                        | 0.  |
|   | (ii) | 0.   | 0.                                  | 0.                                  | 0.   | 0.                      | 0.                              | 0.  |
| (10) KAREN L HAWKINS<br>CHIEF MARKETING OFFICER                     | (i)  | 312,100.   | 88,880.                             | 24,065.                             | 37,500.  | 5,889.                  | 468,434.                        | 0.  |
|   | (ii) | 0.   | 0.                                  | 0.                                  | 0.   | 0.                      | 0.                              | 0.  |
| (11) CHERIF AMIRAT<br>CHIEF INFORMATION OFFICER                     | (i)  | 354,096.   | 46,740.                             | 12,921.                             | 37,500.  | 11,415.                 | 462,672.                        | 0.  |
|   | (ii) | 0.   | 0.                                  | 0.                                  | 0.   | 0.                      | 0.                              | 0.  |
| (12) MICHAEL FORSTER (THRU 04/20)<br>MANAGING DIRECTOR PUBLICATIONS | (i)  | 80,647.  | 88,870.                             | 35,193.                             | 22,229.  | 3,484.                  | 230,423.                        | 0.  |
|   | (ii) | 0.   | 0.                                  | 0.                                  | 0.   | 0.                      | 0.                              | 0.  |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |
|   | (i)  |  |                                     |                                     |  |                         |                                 |   |
|   | (ii) |  |                                     |                                     |  |                         |                                 |   |

**Part III Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

PART I, LINE 1A:

FIRST-CLASS TRAVEL: IN ACCORDANCE WITH POLICY, BUSINESS CLASS FARES ARE PERMISSIBLE, IF BUDGETED BY THE ORGANIZATIONAL UNIT, AND IF THE FLYING TIME IS OVER EIGHT CONSECUTIVE HOURS FOR A SINGLE SEGMENT OR OVER EIGHT HOURS FLYING TIME WHERE A LAYOVER IS REQUIRED. BUSINESS CLASS IS DEFINED AS AN INTERMEDIATE CLASS ABOVE ECONOMY CLASS BUT BELOW FIRST CLASS. IN ALL CASES INDIVIDUALS ARE ENCOURAGED TO PURCHASE UPGRADEABLE COACH CLASS FARES AND USE MILES OR COUPONS TO UPGRADE TO BUSINESS CLASS. PERMISSION TO TRAVEL BUSINESS CLASS FOR MEDICAL REASONS MAY BE GRANTED BY THE PRESIDENT. IF FIRST CLASS IS THE ONLY AVAILABLE CLASS OTHER THAN ECONOMY CLASS, REIMBURSEMENT SHALL OCCUR ONLY WHEN ALL CRITERIA TO TRAVEL BUSINESS CLASS HAVE BEEN MET AND PERMISSION IS GRANTED BY THE UNIT VICE PRESIDENT OR PRESIDENT, OR, IN THE CASE OF STAFF, THE IEEE EXECUTIVE DIRECTOR. ALL REIMBURSED FIRST CLASS FARES SHALL BE REPORTED TO THE IEEE AUDIT COMMITTEE. IN 2020, THE IEEE REGION 7 DIRECTOR WAS REIMBURSED FOR FIRST CLASS TRAVEL OR BUSINESS FIRST CLASS TRAVEL. NO PART OF THESE REIMBURSEMENTS WAS TREATED AS TAXABLE COMPENSATION.

**Part III Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

TRAVEL FOR COMPANIONS:

IN ACCORDANCE WITH POLICY, DUE TO THE EXTENSIVE TRAVEL REQUIRED BY THE IEEE  
PRESIDENT, THE IEEE PRESIDENT IS REIMBURSED FOR REASONABLE, BUDGETED TRAVEL  
EXPENSES FOR THEIR SPOUSE OR OTHER TRAVEL COMPANION WHEN ACCOMPANYING THE  
PRESIDENT ON IEEE BUSINESS. IN 2020, THE IEEE PRESIDENT RECEIVED  
REIMBURSEMENT FOR SPOUSAL TRAVEL INCURRED IN 2020. THESE REIMBURSEMENTS  
WERE TREATED AS TAXABLE COMPENSATION TO THE IEEE PRESIDENT.

TAX INDEMNIFICATION AND GROSS UP PAYMENTS:

IN ACCORDANCE WITH POLICY, THE IEEE PRESIDENT IS PAID A CASH GROSS UP  
PAYMENT TO COVER ANY FOREIGN OR UNITED STATES FEDERAL, STATE, OR LOCAL  
INCOME TAXES APPLICABLE TO THE AGGREGATE VALUE OF THE SPOUSE OR OTHER  
TRAVEL COMPANION TRAVEL EXPENSE REIMBURSEMENT, PLUS THE CASH GROSS UP  
PAYMENT. IN 2020, THE IEEE PRESIDENT RECEIVED A TAX INDEMNIFICATION AND  
GROSS-UP PAYMENT FOR SPOUSAL TRAVEL INCURRED IN 2020. THIS PAYMENT WAS  
TREATED AS TAXABLE COMPENSATION TO THE IEEE PRESIDENT.

PART I, LINE 3:

THE IEEE BOARD OF DIRECTORS, THROUGH ITS EXTERNAL LEGAL COUNSEL ENGAGED A

**Part III Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

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.

A COMMITTEE CONSISTING OF THE IEEE PRESIDENT, THE IEEE PAST PRESIDENT, AND

THE IEEE PRESIDENT-ELECT (THE EXECUTIVE PERFORMANCE AND COMPENSATION

COMMITTEE) IS CHARGED WITH EVALUATING THE TOTAL COMPENSATION PACKAGE OF THE

IEEE EXECUTIVE DIRECTOR, WHO SERVES AS THE CHIEF OPERATIONS OFFICER ("ED &

COO"), AND A COMMITTEE OF INDEPENDENT BOARD MEMBERS AND NON-BOARD MEMBERS

(THE IEEE EMPLOYEE BENEFITS & COMPENSATION COMMITTEE) IS CHARGED WITH

EVALUATING THE TOTAL COMPENSATION PACKAGE OF THE OTHER SELECTED EXECUTIVES

AND BOARD MEMBERS, EXCLUDING THE IEEE ED & COO.

THE 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. EXTERNAL MARKET COMPARISONS

**Part III Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

WERE BASED ON TWO PRIMARY SOURCES OF DATA: (1) FORM 990 FILINGS FOR A GROUP

OF PEER ORGANIZATIONS IDENTIFIED BY COMPENSATION CONSULTANT BASED ON

VARIOUS CRITERIA AND (2) PUBLISHED SURVEYS, FOCUSING ON COMPARABLE

ENTITIES. THE FOLLOWING SCREENING CRITERIA WERE USED TO 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.

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 TWO COMMITTEES REVIEW INDIVIDUAL AND MARKET DATA AS PART OF THEIR



**Part III Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

PROCESS TO DETERMINE APPROPRIATE COMPENSATION. THE TWO COMMITTEES DEBATE  
AND DOCUMENT THEIR DECISIONS ABOUT WHAT IS REASONABLE AND THEIR  
DECISION-MAKING PROCESSES. THE COMPENSATION CONSULTANT PROVIDED A  
"PRESUMPTION OF REASONABLE COMPENSATION" OPINION LETTER FOR THE IEEE FILES,  
DOCUMENTING ITS ANALYSIS AND RECOMMENDATIONS REGARDING MARKET  
REASONABLENESS.

PART I, LINE 4B:

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 \$171,856 (CONTRIBUTION ACCRUAL) IS REPORTED IN SCHEDULE J, PART II,  
COLUMN C. MR. WELBY VESTED AND RECEIVED PREVIOUSLY DEFERRED COMPENSATION OF  
\$60,000 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.

PART I, LINE 5:

**Part III Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

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 INCENTIVE BONUS

PLAN.

PART I, LINE 7:

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 L  
(Form 990 or 990-EZ)

Transactions With Interested Persons

OMB No. 1545-0047

2020

Open To Public Inspection

Department of the Treasury  
Internal Revenue Service

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 for instructions and the latest information.

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.

Table with 4 main columns: (a) Name of disqualified person, (b) Relationship between disqualified person and organization, (c) Description of transaction, (d) Corrected? (Yes/No)

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.

Table with 9 main columns: (a) Name of interested person, (b) Relationship with organization, (c) Purpose of loan, (d) Loan to or from the organization? (To/From), (e) Original principal amount, (f) Balance due, (g) In default? (Yes/No), (h) Approved by board or committee? (Yes/No), (i) Written agreement? (Yes/No)

Total \$

Part III Grants or Assistance Benefiting Interested Persons.

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

Table with 5 main columns: (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

**Part IV Business Transactions Involving Interested Persons.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

| (a) Name of interested person | (b) Relationship between interested person and the organization | (c) Amount of transaction | (d) Description of transaction | (e) Sharing of organization's revenues? |    |
|-------------------------------|---|---------------------------|--------------------------------|---|----|
|                               |   |                           |                                | Yes                                     | No |
| THOMAS M CALLAN               | FAMILY MEMBER   | 94,377.                   | EMPLOYMENT                     |   | X  |
|                               |   |                           |                                |   |    |
|                               |   |                           |                                |   |    |
|                               |   |                           |                                |   |    |
|                               |   |                           |                                |   |    |
|                               |   |                           |                                |   |    |
|                               |   |                           |                                |   |    |
|                               |   |                           |                                |   |    |

**Part V Supplemental Information.**

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

SCH L, PART IV, BUSINESS TRANSACTIONS INVOLVING INTERESTED PERSONS:

(A) NAME OF PERSON: THOMAS M CALLAN

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

FAMILY MEMBER OF MARY WARD-CALLAN, KEY EMPLOYEE

(C) AMOUNT OF TRANSACTION \$ 94,377.

(D) DESCRIPTION OF TRANSACTION: EMPLOYMENT

(E) SHARING OF ORGANIZATION REVENUES? = NO

**SCHEDULE O**  
**(Form 990 or 990-EZ)**

Department of the 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

**2020**

Open to Public  
Inspection

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

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

IN 2020, IEEE MEMBERS, VOLUNTEERS, AND THE ORGANIZATION, CAME TOGETHER

IN RESPONSE TO THE GLOBAL COVID-19 PANDEMIC. DESPITE THE LOSS OF

FACE-TO-FACE OPPORTUNITIES AND INTERACTION, THE ROLE OF IEEE BECAME

EVEN MORE IMPERATIVE: TO FACILITATE THE EXCHANGE OF KNOWLEDGE, ADVANCE

THE TECHNICAL STATE OF THE ART, PROMOTE GUIDELINES AND STANDARDS FOR

PROFESSIONAL EXCELLENCE, AND RAISE PUBLIC AWARENESS AND RECOGNITION OF

OUR MEMBERS' CONTRIBUTIONS.

IEEE OPERATIONS NOT ONLY CONTINUED BUT INTENSIFIED TO MEET THE

INCREASED NEED FOR ACCESS TO TECHNICAL RESOURCES; THE NEED FOR SWIFTER

DISSEMINATION OF PANDEMIC-RELATED PAPERS, A SEAMLESS TRANSITION TO

ONLINE PLATFORMS FOR CONFERENCES AND EVENTS AND EMBRACING NEW WAYS TO

CONNECT AND COMMUNICATE. WE LEARNED EVEN MORE WAYS TO USE TECHNOLOGY TO

WORK SMARTER AND TO REACH WIDER AUDIENCES BY ENGAGING THEM HOW AND

WHERE IT WORKED BEST FOR THEM.

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

VISION STATEMENT: IEEE WILL BE ESSENTIAL TO THE GLOBAL TECHNICAL

COMMUNITY AND TO TECHNICAL PROFESSIONAL EVERYWHERE AND BE UNIVERSALLY

RECOGNIZED FOR THE CONTRIBUTIONS OF TECHNOLOGY AND OF TECHNICAL

PROFESSIONALS IN IMPROVING GLOBAL CONDITIONS.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS:

ALSO INCLUDED A VARIETY OF ONLINE RESOURCES, INCLUDING ONLINE PANEL

DISCUSSIONS FOR VIRTUAL JOB SEEKERS, AND TIPS AND TRICKS ON HOW TO STAY

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

Schedule O (Form 990 or 990-EZ) 2020

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

ACTIVE AT HOME WHEN GYMS ARE CLOSED.

IEEE SPECTRUM, IEEE'S FLAGSHIP MAGAZINE, FEATURED SEVERAL IEEE MEMBERS

AND THEIR WORK TO SUPPORT EFFORTS IN THE FIGHT AGAINST COVID-19,

INCLUDING:

1) MODELING THE EFFECTIVENESS OF PREVENTIVE MEASURES - AN IEEE FELLOW

LED A TEAM OF RESEARCHERS DEVELOPING A MATHEMATICAL MODEL TO EVALUATE

THE IMPACT OF PREVENTION MEASURES, SUCH AS MASK WEARING AND CONTACT

TRACING, ON LIMITING THE SPREAD OF COVID-19.

2) KEEPING MEDICAL WORKERS SAFE WITH 3D PRINTING - AN IEEE MEMBER

TRANSITIONED A 3D PRINTING COMPANY TO CREATE PERSONAL PROTECTIVE

EQUIPMENT FOR MEDICAL WORKERS, HELPING BRIDGE SHORT-TERM SUPPLY GAPS.

3) USING AR TO COMBAT COVID-19 - A CANADIAN IEEE MEMBER ADAPTED A

THERMAL IMAGING AUGMENTED REALITY VISOR TO MEASURE THE BODY TEMPERATURE

OF UP TO FIVE PEOPLE AT ONCE. THE DEVICE HAS BEEN INSTALLED IN

LONG-TERM CARE FACILITIES, GROCERY STORES AND UNIVERSITIES.

4) HANDS-ON LEARNING IN A VIRTUAL WORLD - AN IEEE SENIOR MEMBER IN

GERMANY OPENED A REMOTE LAB TO STUDENTS ACROSS THE GLOBE TO GIVE THEM

THE OPPORTUNITY TO PERFORM HANDS-ON EXPERIMENTS WITH REAL HARDWARE OVER

THE INTERNET.

5) BUILDING AND REPAIRING VENTILATORS TO HELP PATIENTS - VOLUNTEERS

FROM THE IEEE RIO DE JANEIRO SECTION, IN PARTNERSHIP WITH LOCAL

UNIVERSITIES, PROFESSIONAL ASSOCIATIONS, INDUSTRY REPRESENTATIVES AND

THE BRAZILIAN GOVERNMENT, REPAIRED MORE THAN A DOZEN BROKEN VENTILATORS

USED IN PUBLIC HOSPITALS.

6) ROBOT VEHICLES MAKE CONTACTLESS DELIVERIES - AN IEEE SENIOR MEMBER

DEVELOPED A FLEET OF SELF-DRIVING VANS TO DELIVER GROCERIES TO

COMMUNITIES UNDER LOCKDOWN. THE VANS MADE MORE THAN 2,500 AUTONOMOUS

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

TRIPS IN CHINA.

IEEE CONTINUES TO ENGAGE WITH GLOBAL COMMUNITIES TO IMPROVE TECHNOLOGY

INFRASTRUCTURE AND SUPPORT ENGINEERING EDUCATION WHERE IT IS NEEDED

THROUGH SEVERAL COLLABORATIVE PROJECTS. THE IEEE HUMANITARIAN

ACTIVITIES COMMITTEE AND SPECIAL INTEREST GROUP ON HUMANITARIAN

TECHNOLOGY (SIGHT) IS A GLOBAL NETWORK OF IEEE VOLUNTEERS PARTNERING

WITH UNDERSERVED COMMUNITIES AND LOCAL ORGANIZATIONS TO IDENTIFY AND

ADDRESS CRITICAL PROBLEMS. IN 2020 IEEE SIGHT FUNDED OVER 100 PROJECTS

INCLUDING:

1) THE IEEE MALAYSIA SECTION IEEE ENGINEERING IN MEDICINE AND BIOLOGY

SOCIETY CHAPTER RECEIVED FUNDING TO CREATE A DEVICE THAT LIMITS THE

SPREAD OF PATIENT AEROSOLS GENERATED DURING DENTAL APPOINTMENTS. THE

DEVICE ALLOWS DENTISTS TO WORK WITH PATIENTS WHILE MAINTAINING A HIGHER

DEGREE OF SAFETY. OVER 150 DEVICES WERE DISTRIBUTED TO A GOVERNMENT

HOSPITAL AND CLINICS IN MALAYSIA.

2) THE IEEE UGANDA SECTION RECEIVED FUNDING FOR ITS PROJECT THAT USED

3D PRINTING TECHNOLOGIES TO ASSIST THE COUNTRY TO ADDRESS A LACK OF

MEDICAL SUPPLIES. THE TEAM PRODUCED 3D-PRINTED FACE SHIELDS AND MADE

THEM AVAILABLE TO FRONT-LINE HEALTH WORKERS.

3) THE IEEE ZAMBIA SECTION SIGHT GROUP DESIGNED, PRODUCED, AND

DISTRIBUTED REUSABLE FACE MASKS. THEY ALSO CREATED EDUCATIONAL

MATERIALS ON MEASURES TO REDUCE THE SPREAD OF THE VIRUS AND SHARED THEM

WITH COMMUNITY MEMBERS.

OTHER IEEE PROGRAMS INCLUDED:

IEEE INDIA, IN COLLABORATION WITH THE INDIA COUNCIL, REQUESTED

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PROPOSALS TO ADDRESS AND MITIGATE THE COVID-19 PANDEMIC. THE RESULT WAS

THE FUNDING FOR VIROBOT, A ROBOTIC NURSE DESIGNED TO ASSIST DOCTORS AND

CAREGIVERS WHILE ATTENDING TO COVID-19 PATIENTS.

THROUGHOUT THE PANDEMIC, IEEE CONTINUED TO SUPPORT MEMBERS - BOTH YOUNG

PROFESSIONALS AND HIGHER-GRADE MEMBERS - BY OFFERING SEVERAL VIRTUAL

RESOURCES TO HELP THEM ADVANCE PROFESSIONALLY.

1) CONTINUING EDUCATION - IEEE PROVIDES MEMBERS WITH CONTINUING

EDUCATION RESOURCES. IN 2020, IEEE CREATED THE ROLE OF

"EDUCATOR-IN-CHIEF" IN THE AREAS OF ARTIFICIAL INTELLIGENCE, INTERNET

OF THINGS AND SMART GRID TO HELP IDENTIFY AND DEVELOP CONTENT AND

RESOURCES TO SUPPORT LIFELONG LEARNING OPPORTUNITIES.

2) VIRTUAL LEARNING - IN 2020, IEEE LAUNCHED MORE THAN 60 FREE

EDUCATIONAL WEBINARS PRODUCED BY IEEE EDUCATIONAL ACTIVITIES AND

DESIGNED FOR STUDENTS, FACULTY, AND TECHNICAL PROFESSIONALS.

3) YOUNG PROFESSIONALS - IEEE CONTINUES ITS WORK TO INCLUDE MORE YOUNG

PROFESSIONALS IN THE ORGANIZATION'S LEADERSHIP, AS WELL AS FOSTERING

GREATER GEOGRAPHIC DIVERSITY. THE 2020 "PANDEMIC TO OPPORTUNITY -

COLLABORATIVE LEADERSHIP TOWARD TECHNOLOGY ADVANCEMENT FOR HUMANITY"

VIRTUAL CONGRESS ENABLED STUDENTS AND YOUNG PROFESSIONALS TO EXPLORE

NEW MODES OF COLLABORATION AND WAYS TO ADVANCE TECHNOLOGY, BOTH DURING

AND AFTER THE PANDEMIC.

FORM 990, PART III, LINE 4B, PROGRAM SERVICE ACCOMPLISHMENTS:

PAYS AN ARTICLE PUBLICATION CHARGE, AND THE ARTICLE IS IMMEDIATELY

FREELY AVAILABLE ONLINE FOR ALL TO READ, DOWNLOAD, AND SHARE. IEEE'S

FULLY OPEN ACCESS JOURNALS SPAN A WIDE RANGE OF TECHNOLOGIES INCLUDING

TELECOMMUNICATIONS, COMPUTING, BIOMEDICAL ENGINEERING, AUTOMOTIVE



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TECHNOLOGY, SIGNAL PROCESSING, INDUSTRY APPLICATIONS POWER AND ENERGY

AND MORE.

THROUGHOUT THE PANDEMIC, IEEE PROVIDED FREE ACCESS TO A COLLECTION OF

COVID-19-RELATED RESEARCH ARTICLES AND STANDARDS. INCLUDED WERE

COVID-19-RELATED PAPERS AND STANDARDS IN THE IEEE XPLORE(R) DIGITAL

LIBRARY ON TOPICS SUCH AS USING ARTIFICIAL INTELLIGENCE FOR HEALTH

DIAGNOSTICS, TELEMEDICINE, AND THE USE OF ROBOTICS IN LABORATORIES.

IN ADDITION TO PROVIDING FREE ACCESS TO COVID-19 RELATED PAPERS, IEEE

SOCIETIES ALSO CREATED A FAST TRACK FOR THE RAPID REVIEW AND

PUBLICATION OF RESEARCH AND DATA THAT COULD HELP IN THE FIGHT AGAINST

COVID-19. THE IEEE ENGINEERING IN MEDICINE AND BIOLOGY SOCIETY CREATED

AN EXPEDITED PEER-REVIEW PROCESS THAT ENSURED HIGH-QUALITY, RELEVANT

PAPERS WERE DISSEMINATED IN A MATTER OF DAYS, RATHER THAN MONTHS, TO

CLINICIANS AND ENGINEERS WORKING ON THE FRONT LINES.

IEEE SIGNED ITS FIRST OPEN ACCESS READ AND PUBLISH AGREEMENT WITH THE

UNIVERSITY OF ILLINOIS, A LEADING INSTITUTION FOR ENGINEERING RESEARCH.

UNDER THE AGREEMENT, RESEARCHERS HAVE ACCESS TO IEEE'S PREMIER

COLLECTION OF JOURNALS, CONFERENCES, AND STANDARDS VIA THE IEEE

XPLORE(R) DIGITAL LIBRARY AND CAN PUBLISH ARTICLES VIA OPEN ACCESS -

FREE AND AVAILABLE TO BE READ BY THE PUBLIC - WITHOUT HAVING TO BE

RESPONSIBLE FOR ARTICLE PROCESSING CHARGES.

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 THE

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NEXT BREAKTHROUGH TECHNOLOGIES.

FORM 990, PART III, LINE 4C, PROGRAM SERVICE ACCOMPLISHMENTS:

2020 CONFERENCES INCLUDED:

1) IEEE INTERNATIONAL CONFERENCE ON COMPUTATIONAL ELECTROMAGNETICS -

FIRST HYBRID EVENT, WHICH IMPLEMENTED SPECIFIC PROTOCOLS TO KEEP

ATTENDEES SAFE, INCLUDING DIVIDED MEETING ROOMS TO ENSURE SOCIAL

DISTANCING REQUIREMENTS WERE MET.

2) 2020 VIRTUAL 5G WORLD FORUM - PROGRAM INCLUDED SESSIONS, SPEAKERS,

AND TUTORIALS WITH 728 ATTENDEES FROM 49 COUNTRIES.

3) IEEE INTERNATIONAL CONFERENCE ON ACOUSTICS, SPEECH AND SIGNAL

PROCESSING - THIS CONFERENCE TRANSITIONED TO VIRTUAL WITHIN SIX WEEKS,

WITH 16,000 ATTENDEES.

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:

STANDARDS AND OTHER IEEE PROGRAMS:

IN 2020, 138 NEW STANDARDS WERE APPROVED FOR PUBLICATION. DESPITE THE

PANDEMIC, TECHNOLOGY AND INNOVATION CONTINUED TO MOVE FORWARD. IN 2020,

THE IEEE STANDARDS ASSOCIATION (IEEE SA) COMPLETED THE FIRST PHASE FOR

AN AUTONOMOUS AND INTELLIGENT SYSTEMS CERTIFICATION. THE INITIAL WORK

DEVELOPED CERTIFICATION CRITERIA FOR RESPONSIBLE INNOVATION AND

DELIVERY OF AUTONOMOUS AND INTELLIGENT SYSTEMS. IEEE INVITED COMPANIES,

GOVERNMENTS, PUBLIC BODIES, AND OTHER INTERESTED STAKEHOLDERS TO ENGAGE

IN THE SECOND PHASE, WHICH WILL FOCUS ON DEPLOYING TRUSTWORTHY SYSTEMS

IN BUSINESS-TO-BUSINESS, BUSINESS-TO-CONSUMER AND

BUSINESS-TO-GOVERNMENT ENVIRONMENTS.

IEEE INTRODUCED IEEE SA OPEN, AN OPEN-SOURCE COLLABORATION PLATFORM

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THAT PROVIDES SUPPORT AND SERVICES FOR OPEN-SOURCE PROJECTS, INCLUDING

PROJECTS RELATED TO STANDARDS DEVELOPMENT, COMMUNITY PROJECTS, PROJECTS

UNDERTAKEN BY INDUSTRY CONSORTIA AND PROJECTS SPONSORED BY INDUSTRY.

IEEE UTILIZED SA OPEN TO DEVELOP STANDARDS IN 2020.

IEEE RECEIVED CONSULTATIVE STATUS WITH THE UNITED NATIONS ECONOMIC AND

SOCIAL COUNCIL (ECOSOC) IN 2020. ECOSOC IS PART OF THE UNITED NATIONS'

EFFORTS TO ADVANCE THE THREE DIMENSIONS OF SUSTAINABLE DEVELOPMENT -

ECONOMIC, SOCIAL AND ENVIRONMENTAL. THIS APPROVAL RECOGNIZES IEEE'S

CONTRIBUTIONS TO SUSTAINABLE DEVELOPMENT AND HUMANITARIAN TECHNOLOGY,

SUPPORTING THE ACHIEVEMENT OF THE UN SUSTAINABLE DEVELOPMENT GOALS AND

PROVIDES FURTHER OPPORTUNITIES TO CONTRIBUTE TO THESE EFFORTS.

IEEE'S MOBILE OUTREACH VEHICLE (MOVE) WAS DEPLOYED TO ASSIST VICTIMS OF

NATURAL DISASTERS WHERE VOLUNTEERS PROVIDED CRITICAL COMMUNICATIONS

INFRASTRUCTURE AND SUPPORT TO A FEDERAL RESOURCE CENTER AND TO AMERICAN

RED CROSS RESPONDERS WORKING IN THE AFFECTED COMMUNITY.

EXPENSES \$ 35,886,258. INCLUDING GRANTS OF \$ 0. REVENUE \$ 31,056,922.

FORM 990, PART V, LINE 4B, LIST OF FOREIGN COUNTRIES:

ARGENTINA, AUSTRALIA, AUSTRIA, BANGLADESH,

BELARUS, BELGIUM, BOSNIA-HERZEGOVINA, BRAZIL,

CANADA, CHILE, CHINA, COLOMBIA,

COSTA RICA, CYPRUS, CZECH REPUBLIC, DENMARK,

ECUADOR, EL SALVADOR, FINLAND, FRANCE,

GERMANY, GHANA, GUATEMALA, HONDURAS,

HUNGARY, HONG KONG, HUNGARY, ICELAND,

INDIA, INDONESIA, ISRAEL, ITALY,

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JAPAN, JORDAN, KENYA, KUWAIT,

LEBANON, LITHUANIA, MACEDONIA, MALAYSIA,

MALTA, MEXICO, NEW ZEALAND, NICARAGUA,

NIGERIA, NORWAY, PAKISTAN, PANAMA,

PERU, POLAND, PORTUGAL,

PHILIPPINES, ROMANIA, RUSSIA, SAUDI ARABIA,

SINGAPORE, SLOVENIA, SOUTH AFRICA, SPAIN,

SRI LANKA, SWEDEN, SWITZERLAND, TAIWAN,

THAILAND, TRINIDAD AND TOBAGO, TUNISIA, TURKEY,

UGANDA, UKRAINE, UNITED ARAB EMIRATES, UNITED KINGDOM,

URUGUAY, VENEZUELA

FORM 990, PART VI, SECTION A, LINE 6:

IEEE HAS A TOTAL OF 396,007 MEMBERS IN OVER 160 COUNTRIES AROUND THE WORLD.

FORM 990, PART VI, SECTION A, LINE 7A:

THE MEMBERS OF IEEE ELECT THE DIRECTORS OF IEEE IN ACCORDANCE WITH THE  
GOVERNING DOCUMENTS.

FORM 990, PART VI, SECTION A, LINE 7B:

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 AS DEFINED IN THE BYLAWS.

FORM 990, PART VI, SECTION B, LINE 11B:

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

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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, SECTION B, LINE 12C:

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 A 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, SECTION B, LINE 15:

THE IEEE BOARD OF DIRECTORS, THROUGH ITS EXTERNAL LEGAL COUNSEL ENGAGED A

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.

A COMMITTEE CONSISTING OF THE IEEE PRESIDENT, THE IEEE PAST PRESIDENT, AND

THE IEEE PRESIDENT-ELECT (THE EXECUTIVE PERFORMANCE AND COMPENSATION

COMMITTEE) IS CHARGED WITH EVALUATING THE TOTAL COMPENSATION PACKAGE OF THE

IEEE EXECUTIVE DIRECTOR, WHO SERVES AS THE CHIEF OPERATIONS OFFICER ("ED &

COO"), AND A COMMITTEE OF INDEPENDENT BOARD MEMBERS AND NON-BOARD MEMBERS

(THE IEEE EMPLOYEE BENEFITS & COMPENSATION COMMITTEE) IS CHARGED WITH

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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.

THE 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. EXTERNAL MARKET COMPARISONS WERE BASED ON TWO PRIMARY SOURCES OF DATA: (1) FORM 990 FILINGS FOR A GROUP OF PEER ORGANIZATIONS IDENTIFIED BY 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 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. 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 TWO COMMITTEES REVIEW INDIVIDUAL AND MARKET DATA AND DEBATE AND DOCUMENT THEIR DECISIONS ABOUT WHAT IS REASONABLE AND THE DECISION-MAKING PROCESSES. THE COMPENSATION CONSULTANT PROVIDED A "PRESUMPTION OF REASONABLE COMPENSATION" OPINION LETTER FOR THE IEEE FILES.

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FORM 990, PART VI, LINE 17, LIST OF STATES RECEIVING COPY OF FORM 990:

AK,AL,AR,CA,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, SECTION C, LINE 19:

THE IEEE GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND FINANCIAL

STATEMENTS ARE AVAILABLE ON THE IEEE WEBSITE AND TO THE PUBLIC UPON

REQUEST.

PART VII, SECTION A, LINE 1A:

EMPLOYEE HOURS REFLECT THE IEEE STANDARD WORK WEEK OF 40 HOURS PER

WEEK. HOURS FOR VOLUNTEER OFFICERS AND DIRECTORS ARE BASED ON ESTIMATES

OF TIME SPENT FOR EACH POSITION. ACTUAL HOURS FOR EACH PERSON MAY VARY

BY WEEK.

**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

**2020**

**Open to Public  
Inspection**

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|--------------------------|---|--------------------------------|------------|
| Name of the organization | INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS, INC. | Employer identification number | 13-1656633 |
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**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)<br>of disregarded entity                           | (b)<br>Primary activity                                | (c)<br>Legal domicile (state or<br>foreign country) | (d)<br>Total income | (e)<br>End-of-year assets | (f)<br>Direct controlling<br>entity                           |
|--|--|---|---------------------|---------------------------|---|
| IEEE BROADCAST TECHNOLOGY CONVENTION LLC -<br>13-1656633, 445 HOES LANE, PISCATAWAY, NJ<br>08854 | PARTNER OF A UK PARTNERSHIP<br>OPERATING A CONFERENCE. | DELAWARE  | 28,286.             | 1,524.                    | INSTITUTE OF ELECTRICAL<br>AND ELECTRONICS<br>ENGINEERS, INC. |
| IEEE INTERNATIONAL LLC - 45-0570011<br>445 HOES LANE<br>PISCATAWAY, NJ 08854                     | NON-PROFIT ACTIVITIES -<br>SCIENTIFIC & EDUCATIONAL    | DELAWARE  | 0.                  | 306,934.                  | INSTITUTE OF ELECTRICAL<br>AND ELECTRONICS<br>ENGINEERS, INC. |
| IEEE GLOBAL LLC - 13-1656633<br>445 HOES LANE<br>PISCATAWAY, NJ 08854                            | NON-PROFIT ACTIVITIES -<br>SCIENTIFIC & EDUCATIONAL    | DELAWARE  | 0.                  | 168,302.                  | INSTITUTE OF ELECTRICAL<br>AND ELECTRONICS<br>ENGINEERS, INC. |

**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<br>of related organization  | (b)<br>Primary activity   | (c)<br>Legal domicile (state or<br>foreign country) | (d)<br>Exempt Code<br>section | (e)<br>Public charity<br>status (if section<br>501(c)(3)) | (f)<br>Direct controlling<br>entity           | (g)<br>Section 512(b)(13)<br>controlled<br>entity? |    |
|---|---|---|-------------------------------|---|---|--|----|
|   |   |   |                               |   |   | Yes  | No |
| IEEE FOUNDATION INC - 23-7310664<br>445 HOES LANE<br>PISCATAWAY, NJ 08854   | ENCOURAGE TECHNOLOGICAL<br>DEVELOPMENT IN<br>ENGINEERING.           | NEW YORK  | 501(C)(3)                     | LINE 7  | NONE  |  | X  |
| IEEE ASIA-PACIFIC LIMITED<br>1 FUSIONOPOLIS WALK 04-07 S. TOWER SOLARIS<br>SINGAPORE, SINGAPORE                       | SCIENTIFIC & EDUCATIONAL  | SINGAPORE   | 501(C)(3)                     |   | INSTITUTE OF<br>ELECTRICAL AND<br>ELECTRONICS | X  |    |
| GLOBAL IEEE INSTITUTE FOR ENGINEERS INDIA<br>26/1 5TH FL WTC BRIDGE GATEWAY DR RAJKUMAR R<br>BENGALURU, INDIA 560 055 | SCIENTIFIC & EDUCATIONAL  | INDIA   | 501(C)(3)                     |   | IEEE ASIA-PACIFIC<br>LIMITED                  |  | X  |
| IEEE TECHNOLOGY CENTRE GMBH<br>HEINSTRASSE 38<br>VIENNA, AUSTRIA  | ENGAGE IN RESEARCH<br>DEVELOPMENT AND INNOVATION<br>IN THE FIELD OF | AUSTRIA   | 501(C)(3)                     |   | INSTITUTE OF<br>ELECTRICAL AND<br>ELECTRONICS | X  |    |

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

SEE PART VII FOR CONTINUATIONS

Schedule R (Form 990) 2020



Part II Continuation of Identification of Related Tax-Exempt Organizations

Table with columns (a) Name, address, and EIN of related organization; (b) Primary activity; (c) Legal domicile (state or foreign country); (d) Exempt Code section; (e) Public charity status (if section 501(c)(3)); (f) Direct controlling entity; (g) Section 512(b)(13) controlled organization? with sub-columns Yes and No.

**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<br>of related organization | (b)<br>Primary activity | (c)<br>Legal domicile<br>(state or<br>foreign<br>country) | (d)<br>Direct controlling<br>entity | (e)<br>Predominant income<br>(related, unrelated,<br>excluded from tax under<br>sections 512-514) | (f)<br>Share of total<br>income | (g)<br>Share of<br>end-of-year<br>assets | (h)<br>Disproportionate<br>allocations? |    | (i)<br>Code V-UBI<br>amount in box<br>20 of Schedule<br>K-1 (Form 1065) | (j)<br>General or<br>managing<br>partner? |    | (k)<br>Percentage<br>ownership |
|--|-------------------------|---|-------------------------------------|---|---------------------------------|--|---|----|---|---|----|--------------------------------|
|  |                         |   |                                     |   |                                 |  | Yes                                     | No |   | Yes                                       | No |                                |
|  |                         |   |                                     |   |                                 |  |   |    |   |   |    |                                |
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**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<br>of related organization   | (b)<br>Primary activity                                   | (c)<br>Legal domicile<br>(state or<br>foreign<br>country) | (d)<br>Direct controlling<br>entity           | (e)<br>Type of entity<br>(C corp, S corp,<br>or trust) | (f)<br>Share of total<br>income | (g)<br>Share of<br>end-of-year<br>assets | (h)<br>Percentage<br>ownership | (i)<br>Section<br>512(b)(13)<br>controlled<br>entity? |    |
|--|---|---|---|--|---------------------------------|--|--------------------------------|---|----|
|  |   |   |   |  |                                 |  |                                | Yes   | No |
| IEEE INC - 20-8766830<br>445 HOES LANE<br>PISCATAWAY, NJ 08854   | SUPPORT SERVICES  | DE  | INSTITUTE OF<br>ELECTRICAL AND<br>ELECTRONICS | C CORP   | 11,128,994.                     | 2,820,840.                               | 100%                           | X   |    |
| IEEE EUROPE GMBH<br>C/O FIDUCIA-INTERGEST SA RUE JOSEPH-GIRAD<br>24-1227 CAROUGE, SWITZERLAND                                    | SUPPORT SERVICES  | SWITZERLAND   | INSTITUTE OF<br>ELECTRICAL AND<br>ELECTRONICS | C CORP   | 0.                              | 0.                                       | 100%                           | X   |    |
| INSTITUTE OF ELECTRICAL AND ELECTRONICS<br>ENGINEERS (IEEE) LATIN AMERICA SA, CO<br>POSADAS POSADAS AND VECINO JUNCAL 1305 FLOOR | SUPPORT SERVICES  | URUGUAY   | INSTITUTE OF<br>ELECTRICAL AND<br>ELECTRONICS | C CORP   | 0.                              | 2,329.                                   | 100%                           | X   |    |
| IEEE GLOBALSPEC, INC. - 14-1816368<br>201 FULLER STREET, SUITE 202<br>ALBANY, NY 12203   | ONLINE ADVERTISING,<br>WEBSITE AND CATALOG<br>ENGINEERING | DE  | IEEE INC                                      | C CORP   | 0.                              | 0.                                       | 100%                           | X   |    |
|  |   |   |   |  |                                 |  |                                |   |    |
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**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.

**1** 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?

|  | Yes | No |
|--|-----|----|
| <b>a</b> Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity ..... |     | X  |
| <b>b</b> Gift, grant, or capital contribution to related organization(s) .....                                 | X   |    |
| <b>c</b> Gift, grant, or capital contribution from related organization(s) .....                               | X   |    |
| <b>d</b> Loans or loan guarantees to or for related organization(s) .....                                      |     | X  |
| <b>e</b> Loans or loan guarantees by related organization(s) .....   |     | X  |
| <b>f</b> Dividends from related organization(s) .....  |     | X  |
| <b>g</b> Sale of assets to related organization(s) .....   |     | X  |
| <b>h</b> Purchase of assets from related organization(s) .....   |     | X  |
| <b>i</b> Exchange of assets with related organization(s) .....   |     | X  |
| <b>j</b> Lease of facilities, equipment, or other assets to related organization(s) .....                      |     | X  |
| <b>k</b> Lease of facilities, equipment, or other assets from related organization(s) .....                    |     | X  |
| <b>l</b> Performance of services or membership or fundraising solicitations for related organization(s) .....  | X   |    |
| <b>m</b> Performance of services or membership or fundraising solicitations by related organization(s) .....   | X   |    |
| <b>n</b> Sharing of facilities, equipment, mailing lists, or other assets with related organization(s) .....   | X   |    |
| <b>o</b> Sharing of paid employees with related organization(s) .....  | X   |    |
| <b>p</b> Reimbursement paid to related organization(s) for expenses .....                                      | X   |    |
| <b>q</b> Reimbursement paid by related organization(s) for expenses .....                                      | X   |    |
| <b>r</b> Other transfer of cash or property to related organization(s) .....                                   | X   |    |
| <b>s</b> Other transfer of cash or property from related organization(s) .....                                 |     | X  |

**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 |
|-------------------------------------|-------------------------------|------------------------|--|
| (1) IEEE ASIA-PACIFIC LIMITED       | M                             | 1,374,560.             | ACCRUAL                                      |
| (2) IEEE, INC.                      | L                             | 62,745.                | ACCRUAL                                      |
| (3) IEEE WORLDWIDE LIMITED          | R                             | 207,806.               | ACCRUAL                                      |
| (4)                                 |                               |                        |  |
| (5)                                 |                               |                        |  |
| (6)                                 |                               |                        |  |

**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<br>of entity | (b)<br>Primary activity | (c)<br>Legal domicile<br>(state or foreign<br>country) | (d)<br>Predominant income<br>(related, unrelated,<br>excluded from tax under<br>sections 512-514) | (e)<br>Are all<br>partners sec.<br>501(c)(3)<br>orgs.? |    | (f)<br>Share of<br>total<br>income | (g)<br>Share of<br>end-of-year<br>assets | (h)<br>Dispropor-<br>tionate<br>allocations? |    | (i)<br>Code V-UBI<br>amount in box 20<br>of Schedule K-1<br>(Form 1065) | (j)<br>General or<br>managing<br>partner? |    | (k)<br>Percentage<br>ownership |
|--|-------------------------|--|---|--|----|------------------------------------|--|--|----|---|---|----|--------------------------------|
|  |                         |  |   | Yes  | No |                                    |  | Yes  | No |   | Yes                                       | No |                                |
|  |                         |  |   |  |    |                                    |  |  |    |   |   |    |                                |
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**Part VII Supplemental Information**

Provide additional information for responses to questions on Schedule R. See instructions.

**PART II, IDENTIFICATION OF RELATED TAX-EXEMPT ORGANIZATIONS:**

NAME OF RELATED ORGANIZATION:

IEEE ASIA-PACIFIC LIMITED

DIRECT CONTROLLING ENTITY: INSTITUTE OF ELECTRICAL AND ELECTRONICS

ENGINEERS, INC

NAME OF RELATED ORGANIZATION:

IEEE TECHNOLOGY CENTRE GMBH

PRIMARY ACTIVITY: ENGAGE IN RESEARCH DEVELOPMENT AND INNOVATION IN THE

FIELD OF ENGINEERING

DIRECT CONTROLLING ENTITY: INSTITUTE OF ELECTRICAL AND ELECTRONICS

ENGINEERS, INC

NAME OF RELATED ORGANIZATION:

IEEE WORLDWIDE LIMITED

DIRECT CONTROLLING ENTITY: INSTITUTE OF ELECTRICAL AND ELECTRONICS

ENGINEERS, INC

**PART IV, IDENTIFICATION OF RELATED ORGANIZATIONS TAXABLE AS CORP OR TRUST:**

NAME OF RELATED ORGANIZATION:

IEEE INC

DIRECT CONTROLLING ENTITY: INSTITUTE OF ELECTRICAL AND ELECTRONICS

ENGINEERS, INC.

NAME OF RELATED ORGANIZATION:

IEEE EUROPE GMBH

**Part VII Supplemental Information**

Provide additional information for responses to questions on Schedule R. See instructions.

DIRECT CONTROLLING ENTITY: INSTITUTE OF ELECTRICAL AND ELECTRONICS

ENGINEERS, INC.

NAME AND ADDRESS OF RELATED ORGANIZATION:

INSTITUTE OF ELECTRICAL AND ELECTRONICS ENGINEERS (IEEE)

LATIN AMERICA SA

CO POSADAS POSADAS AND VECINO JUNCAL 1305 FLOOR 21

MONTEVIDEO, URUGUAY CP11000

DIRECT CONTROLLING ENTITY: INSTITUTE OF ELECTRICAL AND ELECTRONICS

ENGINEERS, INC.