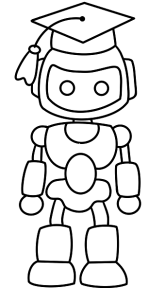


# **Show Me the Money: How to Maximize Available Section Funds**

**Jill Gostin**

**2023 IEEE VP, MGA; 2020-2021 Director R3**

**Presented at SoutheastCon 2025**

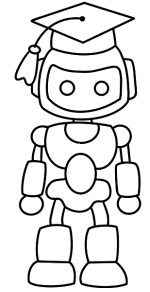


# Outline

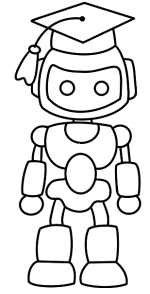
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- Introduction
  - Rebates
  - Region Funding Opportunities
  - Societies/Councils (for Chapters)
  - Students/Affinity Groups
  - MGA Surplus Projects
  - Conference/Workshop
- Surplus
  - Donations
  - IEEE Foundation Grants
  - IEEE SIGHT
  - New Initiatives
  - Helpful Info and Links
  - Conclusions and Q&A

# Introduction



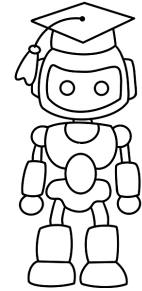
- 2023 IEEE VP, MGA; 2020-2021 Region 3 Director
- Mathematician, Principal Research Scientist, Sensors and Electromagnetic Applications Lab at the Georgia Tech Research Institute... for 1 more day
- IEEE Service: Officer or Board member in Chapter, Section, Region, MGA, 2 Societies, 1 Council, IEEE Board of Directors; Service on Committees: All of the above plus Technical Activities, HKN
- Served as Treasurer and then VP Finance for Sensors Council; Served on TAB FinCom



# REBATES: MGA rules

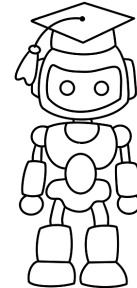
- See [MGA Operations Manual](#), Section 3.4 and Table in Section 3.4.C (also at end of this presentation)
- [IEEE Bylaws](#) I-108.5 specifies that 12% of member dues will be allocated to Geounits.
- Sections in existence on 31 December and meeting minimum requirements receive a rebate
- 10% Bonus for timeliness (financial, meeting, officer) for Sections and some Councils
- The Section's subunits (Subsections, Chapters, Student Branches and Affinity Groups) will be notified about the amount to which their activities contributed to the rebate prior to the distribution of the rebate by 31 August.





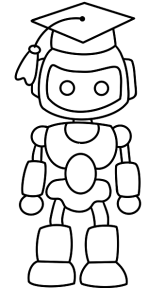
# REBATES: Activity Bonus

- **Activity bonus** to encourage local activities (funds are excluded from the 10% timeliness bonus):
  - All sections (subsections) reporting **10 meetings or more**, at least five of which must be of a technical nature, receive an additional **USD 200 (USD 100)**
  - All chapters or affinity groups reporting **6 or more meetings** (for chapters, 6 must be in the technical category) shall receive an additional **USD 75**
  - Meetings jointly hosted by more than one geounit will count toward the activity bonus of all units
  - Geounits must qualify for the timely reporting bonus in order to be eligible for an activity bonus



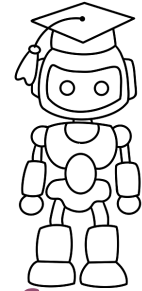
# REBATES: Requirements (1 of 2)

- **Current officer report:** Due 15 March each year, this includes reports of current section, subsection, chapter, and affinity group officers
- **Financial report:** Due 28 February each year. Student Branch and Student Branch Chapter financials are to be reported to their parent Geographic Unit



# REBATES: Requirements (2 of 2)

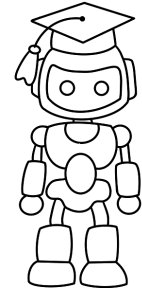
- **Meeting Activity Report(s):** Due 15 March each year. Meeting activity reports are key to unit maintenance and viability. See “File a Report for a Past Event” on vTools.
- **Bank signature card:** The bank signature card(s) for the Section and all of its Subsections, Chapters, Student Branches, and Affinity Groups must be returned to the IEEE Operations Center for the signature of the IEEE Staff Director-Financial Services before the section rebate will be released.



# REBATES: Improve Your Rebate!

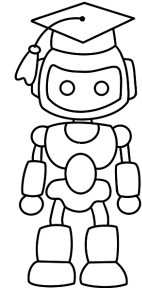
- Encourage members to apply for senior membership (see [Benefits of Senior Membership](#))
- Hold many meetings
  - Vary types of meetings
  - **Try something new** to bring in new members or uninvolved members
- Encourage subunits to work towards increasing membership – even students
- Determine if new chapters or affinity groups are possible
- Meet reporting deadlines





# Region Funding Opportunities

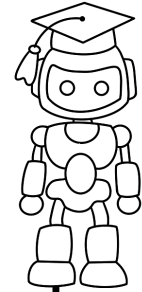
- Professional Activities Funding
  - Earlier today - “Professional Activities: Initiatives and Funding for Projects” session – see slides or talk with Sharlene Brown
- Project Funding
  - Right now! “Project Funding” session – see slides or talk with LaRhonda Julien
- Congressional Visit Day
  - For 2025, funds were made available to support Section YPs participating in CVD, with additional support from the Section. May continue next year?



# Societies/Councils (for Chapters)

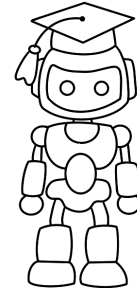
- **Chapters are supported by both MGA** (Section, Region, or Geographic Council) **and Technical Activities** (Societies/Technical Councils)
- **Many Societies/Technical Councils have robust Chapter programs that include:**
  - Financial support
  - Distinguished Lecturers
  - Mentorship / Support Resources
  - Outstanding Chapter Awards
- **Collaborate with Societies/Councils on Local Programs and Events**
  - Reach out to your local Chapter Chairs
  - Communicate with your Student Branches and SB Chapters
- **Form new Chapters and Student Branch Chapters in your Section**
  - Contact Society/Technical Council Chapter Coordinators for support

*Sections, through their Chapter Chairs, will be able to access more support for their local members.*



# Societies/Councils (for Chapters)

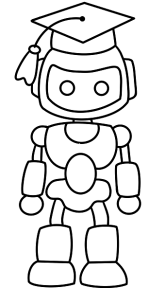
- Each Society/Council (S/C) has its own program -- Reach out to the (S/C) Chapter Coordinator
  - [Chapter Coordinators](#)
  - Rebates for holding N meetings
  - Funds for specific activities – usually a template or webform to submit request
- Utilize Distinguished Lecturer Programs
  - [List of Society/Council Distinguished Lecturer Programs](#)



# Students/Affinity Groups

- Support available for:
  - Young Professionals AGs
  - Students
  - WIE AGs
  - Life Members AGs
- Funds are limited and frequently are depleted early in the year
- Read guidelines well; request examples if needed

# Students/Affinity Groups: YP and Student Activities Committees



**Young Professionals Event Funding**  
supports Affinity Groups and Societies hosting local activities, Student Transition and Elevation events (STEP), and Meetups at IEEE conferences up to \$1,500 per activity.

More info at:

[Young Professionals Event Funding](#)

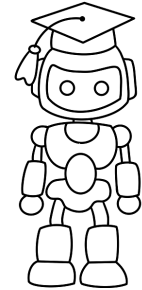


**Student Professional Awareness (SPAx)**  
provides funding to IEEE Student Branches for the organization of events that assist students in their exploration of career development topics, up to \$500 per event.

More info at:

[Student Professional Awareness](#)





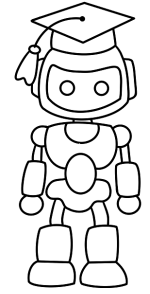
# Students/Affinity Groups: IEEE WIE



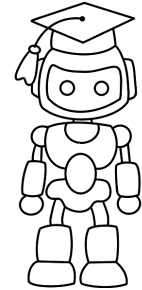
- IEEE Women in Engineering (WIE) encourages the development of local activities that add professional value to IEEE WIE members and are aligned with the WIE mission. <https://wie.ieee.org/funding/>
  - **Initial Funding** – Newly established WIE Affinity Groups (AG) and WIE Student Branch Affinity Groups (SBAG) are eligible to request up to US\$200 in start-up funding.
  - **Special Funding** – WIE AGs and WIE SBAGs may request up to US\$400 in funding for special projects or activities.
- Sample activities include: IEEE WIE workshops, IEEE WIE panel sessions at IEEE Society conferences, joint IEEE WIE/Young Professionals activities, etc.



# Students/Affinity Groups: Life Members Committee



- Small (<\$2k) and large (>= \$2k) funding requests
- Must focus on at least one of the following areas:
  - Supporting LMAG outreach, engagement, and community involvement, especially in areas of student leadership development
  - Promoting LM engagement
  - Advancing the image of IEEE and its members by communicating LM ideals, programs, and IEEE initiatives through various channels
  - Providing broad support for IEEE initiatives
- More information available at the [Life Member](#) website



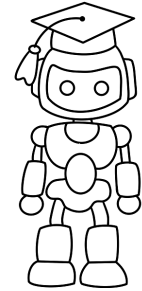
# EPICS in IEEE Service Learning Projects

- Connecting Engineering to Community Service. See [Epics in IEEE](#)
- Design, build, and deploy sustainable solutions to solve local community challenges
- Must involve an IEEE Member and a nonprofit partner
- **Up to \$10,000 in funding, mentorship, and resources**
- **2025 Proposal Deadline: 1 May**
- Project Training Course available via website
- Website also lists additional funding sources!



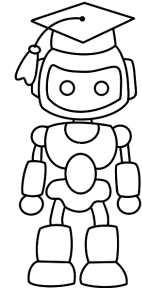
IEEE SoutheastCon 2025 – Charlotte, NC





# MGA Surplus Projects

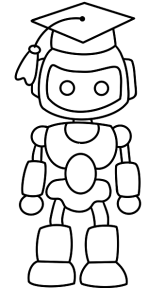
- If MGA has surplus funds from the previous year, and other requirements are met, a call is made for Regions to submit project ideas
- Should include other Regions and shall be a new initiative
- Show how it will become sustainable
- Funds must be used in the calendar year received
- Can't be used for cash awards
- A template will be provided when the call is issued
- **Work continuously to identify and socialize ideas for projects**



# MGA Surplus Projects

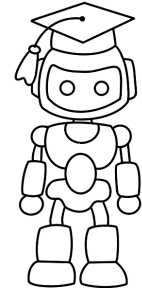
- Guidelines on Requesting MGA Surplus Funding
  - Projects of less than \$10,000 shall **not** be considered
  - As per the IEEE FOM, cash awards shall not be funded as part of this project
  - Preference will be given to **cross-Region** projects with benefits for multiple Regions and broad groups of members and that support member retention
- Review Process for Submitted Projects
  - Initial screening: MGA FinCom
  - Project evaluation: MGA OpCom and the immediate past Treasurer
    - Ranks all projects and recommends projects to MGA Board for approval
  - Number of projects shall be limited by total funds available for that year
- Project Tracking & Reporting
  - Each project will provide a progress report after 3 months and a final report at year end

Note: 2025 deadline for submission was 6 March 2025



# Conference/Workshop Surplus

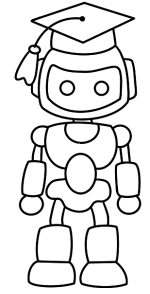
- Sponsorship opportunities with Societies, Sections, other Chapters
- See Conference, Events & Experiences (CEE) web page for more information:
  - <http://events.ieee.org>
- Locate conferences coming to your city!
  - <https://events.ieee.org/organize-an-event/search-ieee-conferences/>
- Consider Tutorials and workshops for locals that need PDHs or CEUs for certifications
  - <https://events.ieee.org/?s=certificates+badges>



# Donations

- IEEE Policy permits Sections and Chapters to accept donations for activities of scientific or technical nature
- The IEEE Development Office supports/coordinates fundraising
- “Solicitation” must be approved in advance. Discuss approval process with IEEE Development Office (varies by amount)
- Establish a Foundation Fund
  - <https://www.ieeefoundation.org/about/establish-an-ieee-foundation-fund/>
    - Submit Fund Establishment Document; must align with Foundation mission
    - Three Phases
      - The Idea (Scope, Cost, Funding Sources, Fundraising Plan, Initiative details, Metrics/Assessment)
      - Approvals (Program/Initiative Approvals, Funding Approvals)
      - IEEE Foundation Board Approvals





# IEEE Foundation Grants

- <https://www.ieeefoundation.org/funding-requests/>
- Proposal types that could be funded include, but are not limited to:
  - New projects or programs that improve access to technology, enhance technological literacy, and/or support technology education where the OU lacks sufficient funding
  - Existing projects or programs that improve access to technology, enhance technological literacy, and/or support technology education in need of funding to scale up activity
  - Workshops intended to bring together like minded individuals to work on societal issues that could benefit from technology and then disseminate the results to a larger audience
  - Fundraising dollar match opportunities for established IEEE programs who have a fund/funds with the Foundation to drive donor giving

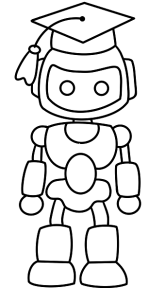
# IEEE SIGHT

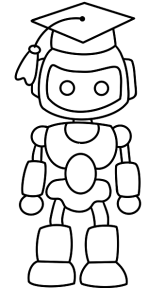
## INDIVIDUAL MEMBERS

- **Submit** a project to a call for proposals
- **Add** free [SIGHT membership](#) to your IEEE membership
- **Form** [a SIGHT Group](#) to assess needs in your local community, apply for financial resources, and implement a sustainable technological solution
- **Read** the [Annual Report and Success Story Portfolio](#) – your story may be published!
- **Take part** in the free, online courses on humanitarian technology and sustainable development topics on the [IEEE Learning Network \(ILN\)](#)
- **Donate** to the [IEEE SIGHT Fund of the IEEE Foundation](#). Your contribution of any amount helps HTB/SIGHT transform the lives of individuals and communities around the world

## IEEE ORGANIZATIONAL UNITS

- **Identify** ideas for collaboration and joint programs
- **Publicize** HTB|SIGHT opportunities so your members can benefit from them





# New Initiatives

An IEEE initiative is a new program, service, or product

... that will provide **significant benefit** to members, the public, the technical community, or customers,

... or which could have **lasting impact** on IEEE or its business processes

**Initiatives must be of strategic importance to IEEE**

Initiatives are **not operational necessities** at the time of their initiation

Projects that can be funded by appropriate baseline budget reductions within the unit are not classified as initiatives

**NIC looks for projects that will further IEEE's strategic goals.**

The infographic titled "IEEE Strategic Plan 2025-2030" outlines the organization's future direction. It is structured into three main sections: Mission, Vision, and Goals. The "OUR MISSION" section states the goal of fostering technological innovation and excellence for humanity. The "OUR VISION" section describes a world where IEEE is essential to the global technical community. The "CORE VALUES" section lists six principles: Growth & Nurturing, Trust, Partnership, Integrity in Action, Global Community Building, and Service to Humanity. The "OUR GOALS" section details three primary objectives: advancing science and technology, driving technological innovation, and providing opportunities for technology professionals. The infographic also includes the IEEE logo and a statement of commitment to a collaborative and inclusive environment.

**IEEE Strategic Plan** 2025-2030

**OUR MISSION**  
We foster technological innovation and excellence for the benefit of humanity.

**OUR VISION**  
IEEE will be essential to the global technical community and to technical professionals everywhere, and be universally recognized for the contributions of technology and of technical professionals in improving global conditions.

**CORE VALUES**

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

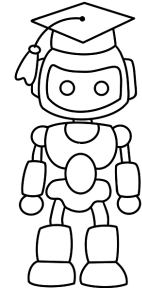
**OUR GOALS**

- Advance science and technology** as a leading trusted source of information for research, development, standards, and public policy
- Drive technological innovation** while promoting scientific integrity and the ethical development and use of technology
- Provide opportunities** for technology-related interdisciplinary collaboration, research, and knowledge sharing across industry, academia, and government
- Inspire intellectual curiosity** and support discovery and invention to engage the next generation of technology innovators
- Expand public awareness** of the significant role that engineering, science, and technology play across the globe
- Empower technology professionals** in their careers through ongoing education, mentoring, networking, and lifelong engagement

IEEE will foster a collaborative environment that is open, inclusive, and free of bias and will continue to sustain the strength, reach, and vitality of our organization for future generations.

[www.ieee.org/strategic-plan](http://www.ieee.org/strategic-plan)  
Approved by the IEEE Board of Directors, November 2024

**IEEE**  
Advancing Technology for Humanity



# New Initiatives: Seed Grants

**Seed Grant: Funds innovative or pilot projects that require US \$40,000 or less and take 12 or fewer months to complete**

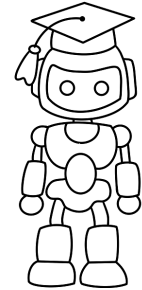
## **Phase 1: Project Description**



## **Phase 2: Seed Grant Proposal**

- An idea is submitted
- NIC provides feedback for consideration via email
- A proposal is submitted
- NIC meets to vote to fund or not to fund at their next meeting
- If approve, funding is granted immediately

*\*Funding to available to work with a business consultant early on to create a project plan*



# New Initiatives: Large-Scale Projects

New Initiatives: Large-scale projects typically seeking US \$100K or more for up to three 12-month periods

## Phase 1: Project Description



## Phase 2: Preliminary Proposal

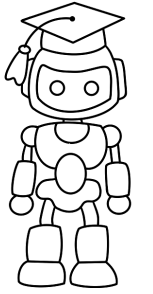


## Phase 3: Full Proposal and Business Plan

- An idea is submitted
- NIC provides feedback for consideration via email
- Preliminary Proposal is submitted
- NIC meets and votes whether to invite a Full Proposal and Business Plan
- Full Proposal and Business Plan
- NIC meets and votes whether to recommend to the IEEE Board of Directors to fund the initiative



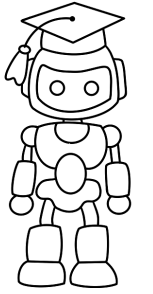
# Helpful Info and Links: R3 Volunteers who can help



- **Conferences (Joe Juisai)**
- **Finance (Joe Pennisi)**
- **Professional Activities (Sharlene Brown)**
- **Section Support (Kristin Bing)**
- **Student Activities (Bailey Heyman)**
- **Projects (LaRhonda Julien)**
- **Area Chairs:**
  1. **Jamie Imanian**
  2. **Alessio Medda**
  3. **Raul Ortega**
  4. **Paul Kuban**
  5. **Rajeev Agrawal**

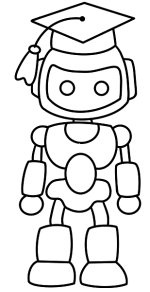


# Helpful Info and Links: Section Finances

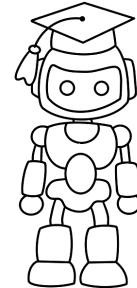


- Session Saturday on Section Budgeting (Joe Pennisi)
- See [MGA Operations Manual](#) Section 3.0, 9.5.G, 9.5.H, and 9.5.J
- [IEEE Governing Documents](#)
  - See IEEE Finance Operations Manual
  - See IEEE Policies, Sections 11 and 16
- [Geo-unit Finances](#)
- Review Sections 11 and 16 of the [IEEE Policies](#)

# Helpful Info and Links: Broader Resources



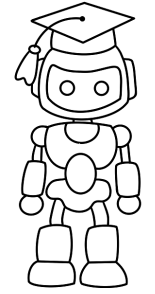
- Center for Leadership Excellence <https://ieee-elearning.org/CLE/>
- IEEE Governing Documents  
<https://www.ieee.org/about/corporate/governance/index.html>
- MGA Homepage <https://mga.ieee.org>
- IEEE Finance Operations Manual (FOM)  
<https://www.ieee.org/content/dam/ieee-org/ieee/web/org/financial-ops-manual.pdf>
- IEEE Volunteer Hub <https://mga.ieee.org/volunteer-hub>



# Conclusions and Q&A

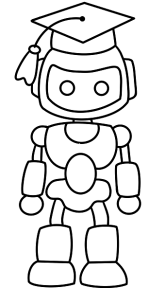
- Money is available, mostly from rebates
- Money is available from various units across IEEE
- You must report meetings
- You must report new officers
- You must submit meeting reports
- **Consider sharing activities with other Sections**
- **Your rebate is larger if you are more active and you submit reports early**

## Q&A



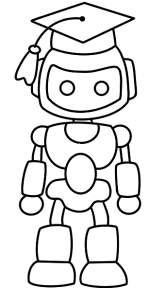
# Additional Information

## Rebate table from MGA Operations Manual Section 3.4.C (1 of 2)



Organizational Unit	Section	Subsection	Chapter	Affinity Group	Geographic Councils that are the parents of active Chapters & Affinity Groups	Geographic Units outside of a Section	Student Branches
Base	US\$2,000  (Pro-rated for New Sections)	US\$500.00	US\$200.00	US\$200.00	US\$200/unit	US\$200.00	US\$50.00 for Branches with fewer than fifty (50) IEEE Student Branch members and US\$100.00 for Branches with fifty (50) or more IEEE Student Branch members
Per Member Rebate	US\$3/Member  US\$1.50/Affiliate  US\$4/Sr. Member or Fellow  US\$3.00/Associate Member  US\$3.00/Student or Grad Student Member (if belonging to a student branch)						US\$2.00 per Student Branch Member
Required Minimum	5	5	2 Technical	2		2	4

## Rebate table from MGA Operations Manual Section 3.4.C (2 of 2)



Organizational Unit	Section	Subsection	Chapter	Affinity Group	Geographic Councils that are the parents of active Chapters & Affinity Groups	Geographic Units outside of a Section	Student Branches
Number of Meetings/Events	(Chapter and/or Affinity Group meetings may be counted in fulfilling Section meeting requirements)						
Required Minimum of Active Members	50 Higher Grade	25 Higher Grade	12 Higher Grade	6 Higher Grade	N/A	50 Higher Grade	12 Student Members or Graduate Student Members
Timeliness Bonus	10% of total rebate not including activity bonus				10% of total rebate not including activity bonus		