



IEEE-USA Electric Grid Fellowship Program **POLICIES & PROCEDURES**

1. STATEMENT OF PURPOSE

IEEE-USA created the government fellowship program to provide a resource of relevant scientific and technical expertise to the U.S. Government. The intent is to facilitate the sharing of experience, broaden the perspectives of both the science and technology professional and the governmental community, and to promote interactions that enable one to learn from the other.

2. SPONSORSHIP OF FELLOWSHIPS

Each year, IEEE-USA seeks to sponsor IEEE members to serve a one-year fellowship in the U.S. Congress. IEEE-USA established the Government Fellows Committee (GFC) as a standing committee to manage this program. Any IEEE entity may sponsor an IEEE member as a fellow in coordination with the IEEE-USA Government Fellows Committee per the Committee's charter and subject to these guidelines.

3. BASIC QUALIFICATIONS FOR FELLOWSHIP

To be considered for an IEEE-USA Government Fellowship, applicants must submit an application confirming the following basic eligibility requirements:

- a) Applicants must be an IEEE Member (which includes those in graduate student membership status) in good standing at the time of application.
- b) Applicants must be U.S. citizens at the time of application or, at the latest, prior to selection.
- c) Additional eligibility requirements are specified in the *IEEE-USA Congressional Electric Grid Policy Fellowship Position Description*.

4. APPLICATION PROCEDURES

- 4.1 Advance Publicity: The Government Fellows Committee shall publicize a description of the program and the application requirements (and deadline) with sufficient notice to allow reasonable time for response. This shall be done via news releases and/or advertisements placed in IEEE publications with broad distribution to IEEE U.S. members, such as *IEEE Spectrum* or *IEEE-USA Insight*, as well as trade and general press as appropriate.
- 4.2 Applications Process: The Government Fellows Committee provides all application materials, including the application form and additional informational material as may be deemed useful, on the IEEE-USA website. The website clearly indicates the closing date for receipt of applications. Applicants should submit the application to the link on the IEEE-USA website.

Applicants are asked to complete an application form providing personal history, background, and contact information, to which the following items are required:

- a. A Letter of Intent covering the applicant's personal objective(s) for the Fellowship, a summary of relevant qualifications and experience, willingness to abide by the terms and conditions indicated in the program policies and procedures, and disclosure of any actual or apparent conflicts of interest (with explanation).
- b. Personal and technical resume; including description of IEEE activities and related group/society affiliations.
- c. For ethics reasons, employment outside the fellowship is not permitted, even in the case of those who are self-employed. There may be an exception to this ethics rule, for example, you earn income from an activity totally unrelated to your science and technology expertise or engineering/ science career.
- d. Three (3) letters of reference. Letters may be written by colleagues and supervisors who need not be IEEE members. The letters should speak to the applicant's technical qualifications, professional experience, IEEE volunteer activities, public policy experience, and/or suitability for the Fellowship. The letters should reflect a solid understanding of the role of an individual working in the U.S. Congress or the U.S. Department of State and should speak to the candidate's ability to work in a public policy environment.

As part of the application process, IEEE-USA may also request additional proof of advanced degrees if necessary for informed review.

Fellowship applications, together with required supporting materials, shall be submitted no later than the published application closing date and time. It is the applicant's responsibility to ensure that IEEE- USA has received a completed application by the posted deadline.

In those cases where an incomplete application is submitted, the applicant will be advised of those items required to complete the application. Applications will generally not be considered by the sponsoring entity unless completed prior to dates established for review. In those cases where an element cannot be obtained at the time of application but it is certain that the information will be available in the event of selection, the applicant may state reasons for the absence of the required item at the time of application and the expected likelihood of its future availability. The sponsoring entity may choose to entertain such applications on a case-by-case basis.

5. FELLOW SELECTION PROCEDURES

- 5.1 Selection Criteria: In evaluating applications, the Government Fellows Committee shall consider the basic eligibility requirements in Section 3 above and the specific eligibility requirements in the *IEEE-USA Electric Grid Congressional Fellowship Position Description*.
- 5.2 Review and Preliminary Selection: The candidates' applications will be reviewed by the Government Fellows Committee based on an overall assessment of the selection criteria. From these preliminary rankings, the Committee shall meet to select one or more finalists to be invited for interviews. Applicants who are chosen for an interview will also be required to submit a time-limited writing exercise based on a real-world public policy situation. The exercise will be solicited and delivered to the selection committee no later

than one week before the interviews.

- 5.3 Finalist Interviews: Finalists are required to attend a personal — either virtual or in-person — interview at a time and place designated by the Government Fellows Committee. If interviews are held in-person, IEEE-USA will reimburse reasonable travel and related expenses for participation in the interview. Finalist(s) shall be interviewed personally by the Government Fellows Committee members and staff, and other program partners and Institute staff as necessary.
- 5.4 Final Selection: Based on the results of the interview(s) and the totality of the application process, the Government Fellows Committee shall recommend to the IEEE-USA Board, the name(s) of the Fellow(s) selected for their approval.
- 5.5 Notification and Acceptance: Upon selection, the IEEE-USA Managing Director or appropriate staff designee shall arrange for prompt notices to be sent to the selected Fellow(s). The announcement may be made by telephone. At an applicant's request, the announcement shall be followed by a written formal letter of notification. Applicants shall return the announcement with an acceptance of the Fellowship. Following acceptance, the Fellow(s) will be presented with the proposed Terms of Appointment (i.e., a formal contract between the Institute and the Fellow) outlining the terms and conditions of the Fellowship. (See Item 6.1 below). IEEE-USA shall also arrange for such public notices as may be desired.
- 5.6 Securing Fellowship Assignment: The fellow is responsible for securing a fellowship position within Congress, and negotiating the scope and conditions of work. IEEE-USA will provide whatever reasonable advice and assistance are possible.

6. TERMS AND CONDITIONS OF APPOINTMENT

- 6.1 Generally: Following acceptance, the terms and conditions of appointment shall be specified in a Fellowship Agreement signed by the Fellow and by appropriate representatives of the IEEE. The standard terms and conditions are outlined in Sections 6.2-6.7 below.
- 6.2 Terms of Appointment: The standard term of appointment shall be for one year (12 months) commencing in September. Other terms may be negotiated for mutual convenience. Extensions may be granted under certain circumstances by affirmative vote of the Government Fellows Committee and with the consent of the IEEE-USA President. If agreed upon by the fellowship host office, and resources permitting, fellows could be offered the opportunity to renew for a second year, at no cost to IEEE-USA.
- 6.3 Fellowship Stipend(s) and Allowances: IEEE-USA will provide a Fellowship stipend. Only full-time, professional work experience shall count towards the experience requirements stated in Section 3 - BASIC QUALIFICATIONS FOR FELLOWSHIP. Time spent working in an internship or student-related employment shall not be counted. Stipends are normally paid in two equal lump sum payments at the beginning and mid-point of the Fellowship. Alternative payment schedules can be negotiated.
- 6.4 Reports: Fellows are required to provide the Government Fellows Committee with three written reports. The first or placement report is due within 30 days after placement in the Fellowship and should describe why the Fellow chose his or her placement, provide an overview of responsibilities and on-going activities, and provide feedback on the orientation and placement process. The mid-term report is due after the sixth month of the Fellowship and should provide an overview of on-going activities and accomplishments. The final report, due no later than one month after completion of the Fellowship, should describe the

Fellow's activities and accomplishments including the scope and impact of any activities connected with his or her assignments, and offer any personal perspectives or recommendations for improvements to the program. In addition, Fellows are encouraged to provide brief monthly status reports.

- 6.5 Presentations: If appropriate and consistent with the fellow's schedule, the fellow may be called upon to give verbal presentations to the IEEE-USA Board of Directors or to other Institute members or groups. Reimbursement for related travel must be authorized in advance by the Secretary, Government Fellows Committee and will be an allowable expense directly chargeable to IEEE-USA.
- 6.6 Interviews and Orientation: Each selected fellow is required to attend a fellowship orientation program. The orientation takes place in Washington, DC. IEEE-USA will pay the required orientation program registration fee.
- 6.7 Freedom from Influence: The following guidelines are provided to ensure the Fellow's freedom from improper influence:
- a. It is clearly understood by all parties that the Fellow is not an employee of IEEE.
 - b. The Fellow is free to choose his or her assignments consistent with the purposes of the Fellowship and is not bound to represent the views or positions of IEEE as a condition of the Fellowship but may call upon the Institute for technical information and any other general support required. IEEE will not attempt to control or regulate the Fellow's independence of thought or service.
 - c. The Fellow may continue to communicate with past employers and is encouraged to seek technical information from all cognizant sources. However, he or she shall not compromise the integrity of the advice and assistance rendered to the Federal Government by permitting undue influence by any organization or individual, nor by actions that would suggest such influence.
 - d. The Fellow may not accept any other employment or additional reimbursements for services rendered during his or her term of office except as specifically disclosed in the original application and agreed to in writing by the Institute. Unusual situations shall be referred to the Vice President for Government relations in consultation with the Managing Director of IEEE-USA for interpretation and rulings.
 - e. The Fellow shall not engage in partisan political activities during the term of appointment.
 - f. As a condition of the Fellowship, the Fellow may be required by the Federal Government to sign a statement declaring adherence to policies and laws governing codes of ethical conduct.

6.8 Modification/Termination of the Fellowship

The standard terms and conditions of the Fellowship may be modified or terminated by mutual agreement of the parties or as specified below. Although it is the intention of the Institute to continue this program throughout each term of appointment, circumstances may dictate cancellation at any time. Should this occur, the Institute will provide to the affected fellow the balance of any agreed-upon reimbursements in one or more amounts. Similarly, the fellow accepts an obligation to return any per diem expense reimbursements received for periods after the termination of the fellowship.

Fellowships will be automatically rescinded, and the fellowship agreement cancelled if the fellow has not confirmed a fellowship placement within 60 days after the commencement of the fellowship term, unless the Government Fellows Committee grants an extension.

The fellow's placement and/or assignments are at the pleasure of the host office and are subject to termination at will without explanation. In that instance, the Government Fellows Committee, depending on the circumstances, may work with the fellow to secure a new assignment or terminate the fellowship.

In the event of malfeasance on the part of the fellow as determined by a vote of the IEEE-USA Board of Directors voting-as-whole, the fellowship and associated grant may be immediately suspended.

If illness, disability or urgent personal considerations make it temporarily impossible for the fellow to serve, the Institute shall continue pro-rata or per diem payments for up to 30 days. Should a leave of longer duration be necessary, the IEEE-USA Government Fellows Committee shall, after consultation with the fellow's host office, decide whether to continue or terminate the fellowship.

If the fellow voluntarily terminates for reasons other than illness, disability or urgent personal considerations (as determined by the Government Fellows Committee), payments will be immediately terminated, and no additional expenses will be paid. The fellow accepts an obligation to return any per diem expense reimbursements received for periods after the termination of the fellowship.

7. DISCLAIMER POLICIES

- 7.1 Employment Status: The designation of a fellow and the execution of a fellowship agreement do not constitute an employment contract between the fellow and IEEE, Inc., or any IEEE officials. During the fellowship, no employer-employee relationship shall exist between the fellow and the Institute. The conditions of the fellowship agreement shall be binding on both parties only to the extent that both agree in the written agreements.
- 7.2 Financial Liability: IEEE's total financial liability for reimbursement to the fellow shall not exceed the agreed upon amount for stipend or per diem expenses specified in this agreement unless approved by the Government Fellows Committee Chairman. No person shall have any claim against the Institute for any other expenses, nor for the actions of the fellow.

8. FEDERAL INCOME TAX IMPLICATIONS OF THE IEEE-USA FELLOWSHIP

- 8.1 General: The Institute of Electrical and Electronics Engineers, Inc. (IEEE), a corporation exempt from Federal Income Tax pursuant to Section 501(c)(3) of the Internal Revenue Code (IRC), is an organization established for the purposes of scientific, educational and the advancement of the theory and practice of electrical engineering, electronics, radio and the allied branches of engineering and the related arts and sciences. In order to promote understanding of the influence of such technology on the public welfare, IEEE provides fellowship grants to engineers to choose a fellowship assignment consistent with the purposes of the fellowship program and is not bound to represent the views or positions of IEEE or their employer to the host office as a condition of the fellowship.
- 8.2 Action to be taken by the grantee of a Fellowship grant from IEEE (grantor): It is suggested that the grantee discuss the taxability of their fellowship grants with their personal tax advisors. IEEE makes no representations regarding application or interpretations of the tax

laws and disclaims any responsibility for improper tax filings by the Fellow.

8.3 Action to be taken by the grantor (IEEE) on reporting Fellowship grants to the IRS: IEEE will issue a Form 1099 to grantee and the IRS to report distributed fellowship grants.

9. Amendment

These Guidelines were developed by the IEEE-USA Government Fellows Committee and may be amended by majority vote of that body subject to the IEEE-USA Bylaws and related policies.