MGA Conference Sponsorship Process

Susan Hutton
Project Management
Member & Geographic Activities

20 July 2011
Beijing China
IEEE BoD Motion regarding sponsorship for MGA Conferences

- Board approved motion in May 2011
  - Sections or Regions must approve sponsorship of conferences in certain cases
  - Applies to both technically co-sponsored and financially co-sponsored conferences
  - Applies only when an MGA organizational unit partners with a non-IEEE entity

- MGA has developed a new conference sponsorship process to support the Board approved motion
Today’s presentation topics

- When is approval from the Section required
- Process for obtaining approval from the Section
- Responsibilities of the co-sponsoring IEEE entity and the Section
- Implementation plan for the new process
- Where and when to get training for your volunteers
Sponsorship Scenarios

- Scenario I
  - IEEE PES Chapter and IEEE ComSoc Chapter in Beijing (or any other IEEE entity) wish to co-sponsor a conference
  - PES Chapter is 100% financial sponsor
  - ComSoc Chapter is technical co-sponsor

- Approval level required
  - PES Chapter enters into MOU with ComSoc Chapter. No additional approvals required.
Sponsorship Scenarios

- **Scenario II**
  - IEEE PES Chapter wishes to co-sponsor a conference with a local university
  - Local university is 100% financial sponsor
  - PES Chapter is technical co-sponsor

- **Approval level required**
  - PES Chapter must seek approval of their IEEE Section before entering into MOU with university
Sponsorship Scenarios

- Scenario III
  - IEEE PES Chapter wishes to co-sponsor a conference with a local university
  - Local University is 40% financial sponsor
  - PES Chapter is 60% financial sponsor

- Approval level required
  - PES Chapter must seek approval of their IEEE Section before entering MOU with university
In Summary

- Section level approval is required
  - When any MGA OU co-sponsors a conference with an outside entity
  - Applies to all MGA OUs - Subsections, Chapters, Geographic Councils, Affinity Groups, Student Branches, etc.
  - Applies to financial as well as technical co-sponsorships

- Policy provides Region discretion
  - Region approvals may be required for certain cases
New process for obtaining co-sponsorship approval

Conference Organizer requests co-sponsorship from an IEEE entity

IEEE entity requires “Conference Quality Questionnaire” to be completed by Conference Organizer*

IEEE entity uses the Conference Quality Questionnaire to evaluate the quality of the technical program

If IEEE entity desires to co-sponsor Conference, an MOU is created between the sponsoring parties and forwarded to the Section

* Conference Quality Questionnaire follows
New Process for obtaining co-sponsorship approval (continued)

If Section approves co-sponsorship, MOU is signed by the Section Chair and returned to sponsoring IEEE entity

Conference Organizer is notified of agreement to co-sponsor

MOU is executed by Conference Business Services in Piscataway NJ and conference is entered into IEEE Conference Database

Copy of MOU is forwarded to Region Director for information purposes
Conference Quality Questionnaire

- Identify structure of Technical Program Committee
  - Number of members
  - Roles of members
  - Details about each reviewer

- Describe the direct and substantial involvement of IEEE Co-Sponsoring Entity

- Define Review Process
  - Type of materials reviewed
  - Reviewer’s criteria
  - Resolution of conflicting opinions
  - Papers per reviewer

- Define Submissions/Acceptance Rate

- Describe how papers will be presented at the conference
Responsibilities

- Co-sponsoring IEEE entity
  - Obtain the proper approvals for co-sponsorship
  - Be involved in the technical program
  - Ensure technical quality of the conference
  - Ensure proper use of IEEE brand
  - Ensure that all IEEE policies are followed by the conference organizers
Responsibilities

IEEE Section

- Evaluate technical quality of the conference
- Ensure direct and substantial involvement from the co-sponsoring IEEE entity before approving
- Monitor conferences that have been approved for co-sponsorship
Note to co-sponsoring entities:

**IEEE Conference Business Services must execute the MOU and initiate the conference before the conference may:**

- Use IEEE Logo in any way
- Reference IEEE as a sponsor
- Reference IEEE Xplore or IEEE Publications
- Use IEEE name in any collateral
- Use IEEE in the Conference Name
Implementation Plan

- Training of new process and policy – July through December 2011
- Use of process required Jan 2012
- IEEE Conference Exchange (ICX) Development – Phase I complete 1st quarter 2012
- Modifications to IEEE.org Conference landing pages – by EOY
- MGA Operations Manual updates – by EOY
## Training Plan

<table>
<thead>
<tr>
<th>Training/Communication</th>
<th>Type</th>
<th>When</th>
<th>Where</th>
<th>Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volunteer Leadership Workshop</td>
<td>Face-to-face - details of new process and expectations for section approval and IEEE conference co-sponsors</td>
<td>7/20/2011</td>
<td>Beijing, China</td>
<td>Section and Sub-Section Chairs, Conference Coordinators and other IEEE volunteers</td>
</tr>
</tbody>
</table>
| POCO Training Session                       | 1. General Session Conference Sponsorship & MOU Presentation (brief description of new process)  
2. Conferences Committee Panel Discussion (Q&A)  
| Sections Congress                           | Conducting Conferences Workshop - brief description of new process  | 8/20 - 8/21/2011 | San Francisco, CA | 1200 Section Leaders & IEEE volunteers                                    |
| Conference Coordinator & Section Chair Training | Series of Webinars - detailed presentation and discussion of new process and expectations for Section Chairs with regards to approval process | 10/1- 11/1/2011 | 6-8 Webinars initiated from Piscataway scheduled to accommodate the various time zones | Region Directors, Region Conference Coordinators, Section Chairs |
## Training Plan

<table>
<thead>
<tr>
<th>Training/Communication</th>
<th>Type</th>
<th>When</th>
<th>Where</th>
<th>Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conference Sponsor Training</td>
<td>Series of Webinars - detailed presentation and discussion of new process and expectations for IEEE OU conference sponsors</td>
<td>11/1 - 12/1/2011</td>
<td>6-8 Webinars initiated from Piscataway scheduled to accommodate the various time zones</td>
<td>All IEEE MGA OU Chairs who sponsor conferences (Subsections, Chapters, Councils, Student Branches, Affinity Groups, etc.)</td>
</tr>
<tr>
<td>SCOOP</td>
<td>Outbound Email Communication</td>
<td>Nov Issue</td>
<td>Email</td>
<td>IEEE Volunteers</td>
</tr>
<tr>
<td>Conference Organizers Newsletter</td>
<td>Outbound Email Communication</td>
<td>Nov Issue</td>
<td>Email</td>
<td>IEEE Conference Organizers</td>
</tr>
<tr>
<td>Region Meeting Presentations</td>
<td>Face-to-face presentations - available if required</td>
<td>Beginning in October 2011 and continuing throughout 2012</td>
<td>Various Region Meetings</td>
<td>Region/Section Leadership</td>
</tr>
</tbody>
</table>
Questions