

# Workshop on Organizing Conferences

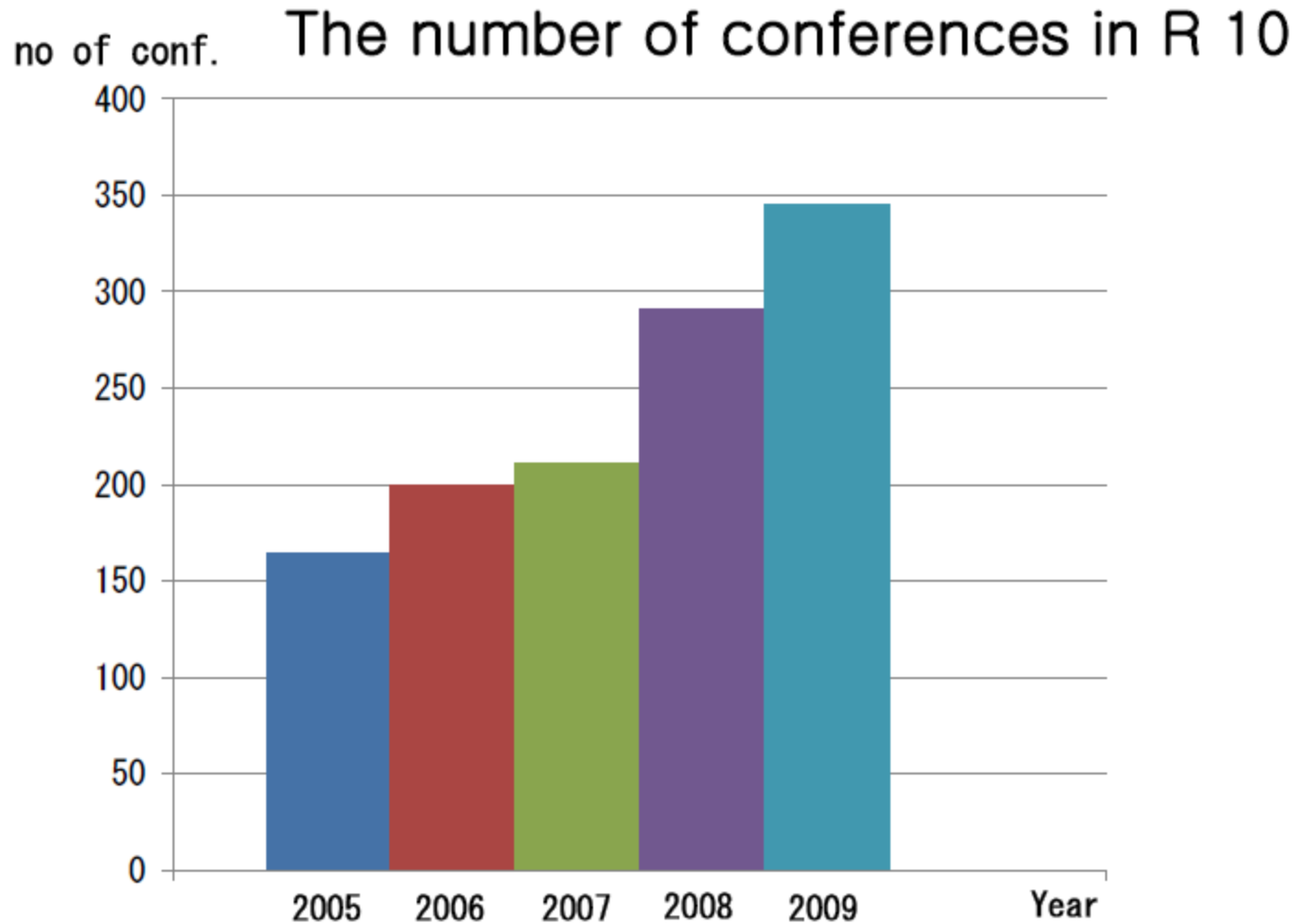
IEEE Annual Meeting  
Cebu, February 2010

**Marzuki Khalid**

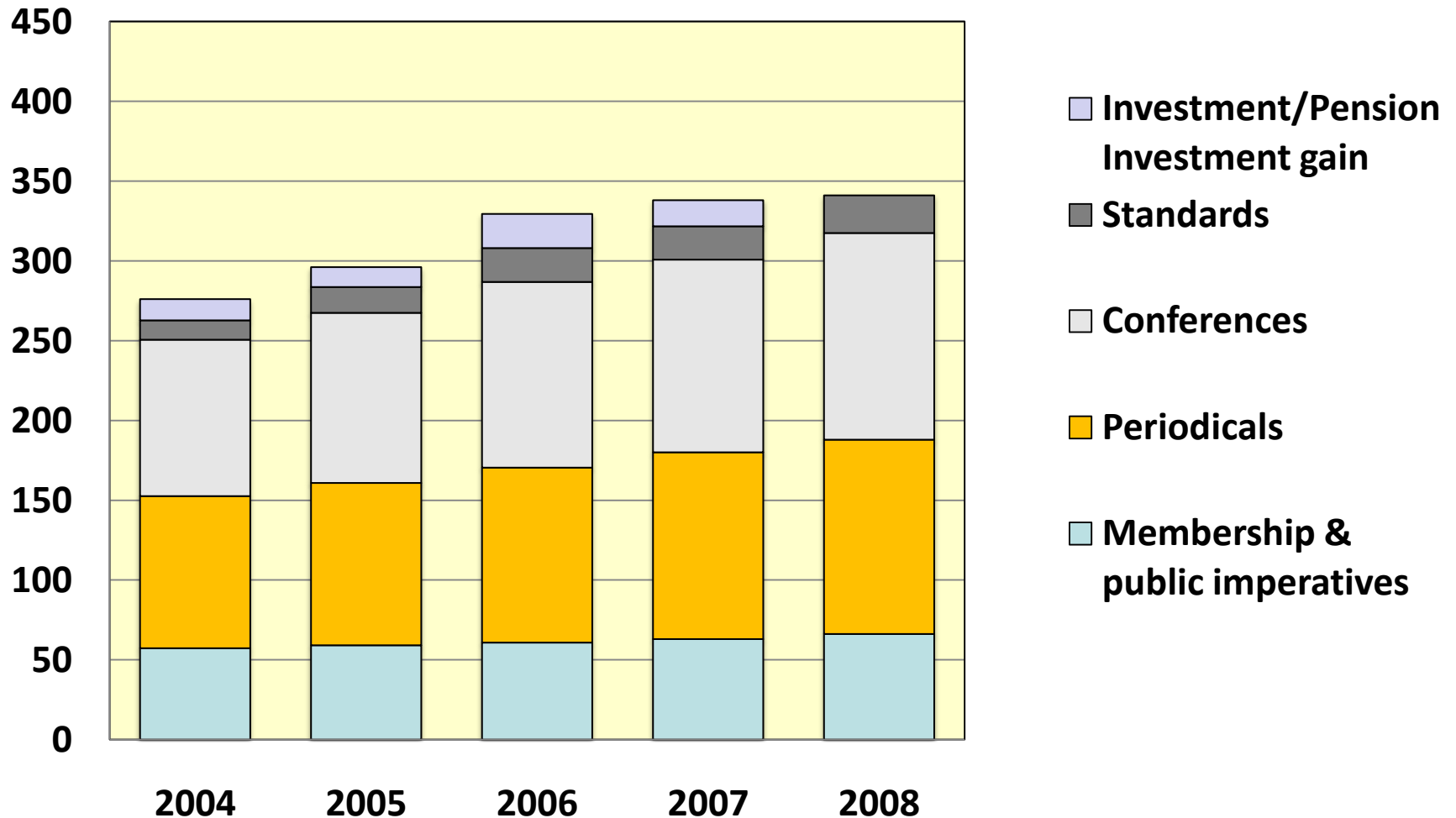
Regional Conference Coordinator

R10CON

# Conferences Organized in Region 10



# Lines of Operation Revenue US\$ (M)



<sup>3</sup>(Adopted from Pete Staecker's slides)

# Past TENCON Events

- 2005: Melbourne
- 2006: Hong Kong
- 2007: Taipei
- 2008: Hyderabad
- 2009: Singapore

## Future TENCON Events

- 2010: Fukuoka (21-24 Nov. 2010), Japan  
Fukuoka International Congress Center, Japan.
- 2011: Indonesia
- 2012: The Philippines

# REVENUES FROM TENCON SERIES

## Income from TENCON Series (in USD)

- TENCON 2005 Surplus to R10 = \$15,171 (Melbourne)
- TENCON 2006 Surplus to R10 = \$13,829 (Hong Kong)
- TENCON 2007 Surplus to R10 = \$9,266.99 (Taipei)
- TENCON 2008 Surplus to R10 = \$5353.33 (Hyderabad)
- TENCON 2009 = accounts not yet closed (Singapore)

# PRESENTATION OUTLINE

- CONFERENCE BASICS
- ABOUT POCO
- CONFERENCE BUSINESS SERVICES
- CONFERENCE CONTRACTS
- FROM THE ORGANIZER'S PERSPECTIVE
- CONFERENCE FINANCE (Pete Staecker)
- CONFERENCE PUBLICATIONS
- OTHER ISSUES OF IMPORTANCE

# Conference Basics: Workshop for New Conference Organizers

By

IEEE Panel of Conference Organizers (POCO)

# What we have to share with Conference Organizers?

**IEEE- Panel of Conference Organizers (POCO)**

- Conference Basics: Workshop for New Conference Organizers – (74-page PPT) by POCO
- How to organize an IEEE Conference?: Checklist & Timeline (14-page PPT) by POCO

You may download the following from:

[http://www.ieee.org/web/conferences/organizers/required\\_documentation.html](http://www.ieee.org/web/conferences/organizers/required_documentation.html)

# Try to attend POCO 2010

- The Panel of Conference Organizers (POCO) is the annual educational and networking event for IEEE Conference Organizers, Regional Conference Coordinators, and the Vice Presidents of Conferences for each society.
- Its purpose is to foster a sense of community among IEEE Conference volunteers, offer seminars and sessions to advance skill in coordinating an IEEE Conference, and promote IEEE Conferences and the fields of science and technology among conference attendees.
- There is no registration fee for POCO, and many societies will reimburse travel and lodging expenses for attendees. Meals are provided.

# Example of POCO Workshop in Seattle, Wa, USA – July 2008

USHERING IN A NEW ERA OF IEEE CONFERENCES

24-26 July 2008

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Thursday 24 July, 1200 – 2000

1200 – 1300 Lunch

1300 – 1445 [Conference Basics: Workshop For New Conference Organizers](#)

(supplement: [Conference Basics Handout](#))

(supplement: [Conference Basics](#)) (slides plus audio)

1500 – 1700 Conference Strategy Meeting

1800 – 2000 POCO Meet and Greet Reception – Seattle Marriott Waterfront

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Friday 25 July, 0700 – 2030

0700 – 0800 Breakfast

0800 – 0810 Welcome Jerry Engel Chair, Conferences Committee

**0810-0950 IEEE CONFERENCES: WHERE WE ARE – WHERE WE'RE GOING**



# POCO 2008 Seattle – (Continued)

**0810-0950 IEEE CONFERENCES: WHERE WE ARE – WHERE WE'RE GOING**

(supplement: [IEEE Conferences: Where We Are - Where We're Going](#)) (slides + audio)

The Value of IEEE Conferences to Industry ([PDF](#)) ([PPT](#))

J. Roberto de Marca Chair, TAB

MGA and Conferences ([PDF](#)) ([PPT](#))

Joe Lillie Chair, Member and Geographic Activities

State of the IEEE Conference Business ([PDF](#)) ([PPT](#))

Samantha Padilla Staff Director, Meetings & Conferences

The Year Ahead...

IEEE 125th Celebration & Public Visibility ([PDF](#)) ([PPT](#))

(supplement: [Information about the 125th Anniversary mark](#))

Presentations Online - Extending Your Conference Reach ([PDF](#)) ([PPT](#))

John Vig, IEEE President-Elect

0945 – 1010 Break

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**1010 - 1100 GLOBAL CONFERENCE MANAGEMENT**

# POCO2010

## 8-10 July 2010

(Panel of Conference Organizers)

### 2010 POCO

The fifth annual Panel of Conference Organizers (POCO) will be held 8-10 July 2010 at the Washington Marriott, in Washington D.C., USA. Registration information will be provided in early 2010.



# Purpose

- Help to orient new organizers from “the very beginning to the very end”

# Conference Business Services

*(Pink related area on detailed checklist)*

## Coordinator, Conference Operations

Cheryl A Smith

IEEE Technical Activities

Conference Business Services Department

**c.a.smith @ieee.org**

Conference Organizers Home

Page <http://www.ieee.org/conferences/conflink.html>

To reach Conference Services

IEEE Conference Business Services

445 Hoes Lane

Piscataway, NJ 08854 USA

Phone: +1 732 562 3878

Fax: +1 732 981 1769

[conference-services@ieee.org](mailto:conference-services@ieee.org)

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Monday - Friday, 8:00 AM - 4:30 PM Eastern Standard Time





# START

## (Conference Business Services)

### **Policy 10.1.2 Sponsorship**

Sponsorship relates to the responsibilities and accountabilities of an organizational unit (OU) with respect to financial, technical, publicity, and administrative aspects of a conference. For a conference to be considered an IEEE conference, it must be sponsored by at least one IEEE OU.

# START

## (Conference Business Services)

Determine type of sponsorship

- Sole sponsorship
- Co-sponsorship
- Technical co-sponsorship/Technical cooperation

# START

## (Conference Business Services)

Apply for sponsorship from IEEE organizational units (OUs)

- Societies, Councils and Technical Communities
- Geographic Activities (Regions/Sections/Chapters)

# START

## (Conference Business Services)

IEEE - IEEE Societies, Councils and Technical Communities - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://www.ieee.org/web/societies/home/index.html

IEEE Conference Search IEEE Req Docs IEEE - "How To" Ref Wachovia Lifehacker, tips and d...

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**IEEE** The world's leading professional association for the advancement of technology

Search

IEEE (Google) IEEE (Ultraseek)

About Us Membership Publications Conferences Standards Careers Education Volunteers Societies Geographic Activities

Societies Home | IEEE Societies, Councils and Technical Communities

Text size A A A

**Communities**

- IEEE Women in Engineering (WIE)
- New Technology Connections Portal
- Online Communities / Technical Collaboration
- Standards Working Groups

**Councils**

- IEEE Biometrics Council
- IEEE Council on Electronic Design Automation
- IEEE Council on Superconductivity
- IEEE Nanotechnology Council
- IEEE Sensors Council
- IEEE Systems Council
- IEEE Technology Management Council

**Societies**

- IEEE Aerospace and Electronic Systems Society
- IEEE Antennas and Propagation Society
- IEEE Broadcast Technology Society
- IEEE Circuits and Systems Society
- IEEE Communications Society
- IEEE Components Packaging, and Manufacturing Technology Society

IEEE Home » IEEE Societies, Councils and Technical Communities

### IEEE Societies, Councils and Technical Communities

Printer Friendly

Technical innovation and access to that information is a key value of IEEE membership. IEEE includes many unique technical organizations, active in the areas of publications, conferences and building technical communities.

#### Societies

Most IEEE members choose to add value to their membership by [joining](#) one or more IEEE Societies. Benefits include access to current information, opportunities to network with peers, and enhancement of the worldwide value of your profession. Many IEEE Societies offer their members online, full-text access to their publications (availability varies by IEEE Society).

IEEE Society [field of interest statements](#)  
IEEE Societies [listed by IEEE Division](#)

#### What do you want to do?

- Find Societies by [Interest](#)
- [Join](#) a Society
- Find a [Technical Conference](#)
- Browse [Call for Papers](#) Deadlines
- [Find Publications](#)
- Get Manuscript [Submission Guidelines and Tools](#)
- Initiate [Formation](#) of a Society
- Initiate [Formation](#) of a Technical Council
- Become a Society/Council [Volunteer](#)

#### Resources for Volunteers

- [Technical Activities \(TAB\)](#)

#### Featured Society

IEEE Aerospace and Electronic Systems Society

# START

## (Conference Business Services)

The screenshot shows a Mozilla Firefox browser window displaying the IEEE Geographic Activities website. The browser's address bar shows the URL [http://www.ieee.org/web/geo\\_activities/home/index.html](http://www.ieee.org/web/geo_activities/home/index.html). The website header features the IEEE logo and the tagline "The world's leading professional association for the advancement of technology". A navigation menu includes links for "About Us", "Membership", "Publications", "Conferences", "Standards", "Careers", "Education", "Volunteers", "Societies", and "Geographic Activities". The "Geographic Activities" section is active, showing a "Geographic Activities Menu" with links to "USA, Canada & Latin America", "Europe, Middle East & Africa", "Asia & Pacific", "Student Branches (all Regions)", and "Geographic Unit Operations". A "Clickable Region Map" is displayed, showing a world map with regions color-coded. The main content area is titled "Geographic Activities" and includes a "Printer Friendly" link. The text describes the IEEE's division into ten geographic regions and mentions the "IEEE Sections Congress 2008". A "myIEEE" login section is visible on the right, with fields for "Username:" and "Password:" and a "log in" button. The browser's status bar at the bottom shows "Done".

# START

## (Conference Business Services)

IEEE Engineering in Medicine and Biology Society - Mozilla Firefox

http://www.embs.org/conferences/index.html

IEEE Conference Search | IEEE Req Docs | IEEE - "How To" Ref | Wachovia | Lifehacker, tps and d...

IEEE Home | About IEEE EMBS | What's New | Contacts | EMBS Database | EMBS Archive

Home > IEEE EMBS Conferences

### IEEE EMBS Conferences

**Mark Your Calendar!**  
[IEEE EMBS 30th Annual International Conference](#)  
August 21-August 24, 2008  
Vancouver, Canada  
[Click here for details.](#)

- >> [Upcoming Conferences](#)
- >> [EMBS Meetings](#)
- >> [Past Conferences](#)

**Sponsorship Opportunities**  
Obtaining support and/or sponsorship for your next conference is easy if you are an IEEE EMBS member! For details, contact [Jodi Janiszewski](#) at the EMBS Executive Office. Note that there are [standards](#) for the submission of papers to allow IEEE to index papers using IEEE Xplore.  
If you are requesting IEEE EMBS conference sponsorship, please read the following [By-Laws](#) of the EMBS Society before contacting [Ms. Janiszewski](#).

**Technical Co-sponsorship by IEEE EMBS**  
The following guidelines apply to all parties entering into a Technical Co-sponsorship with IEEE EMBS.

http://www.embs.org/conferences/index.html

IEEE UKRI Conferences - Mozilla Firefox

http://www.ieee.org.uk/conferences.html

IEEE Conference Search | IEEE Req Docs | IEEE - "How To" Ref | Wachovia | Lifehacker, tps and d...

IEEE Home | Shop IEEE | Join IEEE | myIEEE | Contact IEEE | IEEE Xplore

### United Kingdom and Republic of Ireland Section

UKRI Home | News | Events | Chapters | Students | GOLD | Join UKRI | UKRI Contacts

#### IEEE UKRI Conferences

Details of conferences that the Section sponsors or co-sponsors can be found on the [Events](#) page. For further information, please contact the UKRI Conference Coordinator, Professor Marwan Al-Akaidi - e-mail: [mma@dmu.ac.uk](mailto:mma@dmu.ac.uk)

**Agreement with IET**  
Under the terms of the [Memorandum of Understanding](#) between the IEEE and the IET (formerly called the IEE), visiting members of the IEEE can attend IET lectures and conferences at the lower IET member rate. They can also use the IET library, members' reading room and other facilities at Savoy, London. See the [IET website](#) for details of their events and facilities.

**Conference Co-sponsorship**  
The UKRI Section of IEEE often agrees to be associated with International Conferences sponsored by other organisations (such as IET, BCIS, IoP, etc.). Normally such an association is limited to assistance with publicity and with the technical programme, and is without financial responsibility on the part of IEEE. The IEEE provides exact definitions of the possible [types of conference involvement](#).

More details about the UKRI involvement in Technical Co-sponsorship can be found in the [Conference Publicity Guide](#).

For further information, please contact Professor Marwan Al-Akaidi - e-mail: [mma@dmu.ac.uk](mailto:mma@dmu.ac.uk)

UKRI Home | IEEE Home | Region 8 Home | UKRI Chapters | Privacy & Security | Terms & Conditions

Done

# START

## (Conference Business Services)

# 24 months BEFORE start date

## (Conference Business Services)

- Contact and/or complete IEEE OU's sponsorship application, if available
- Obtain sponsorship

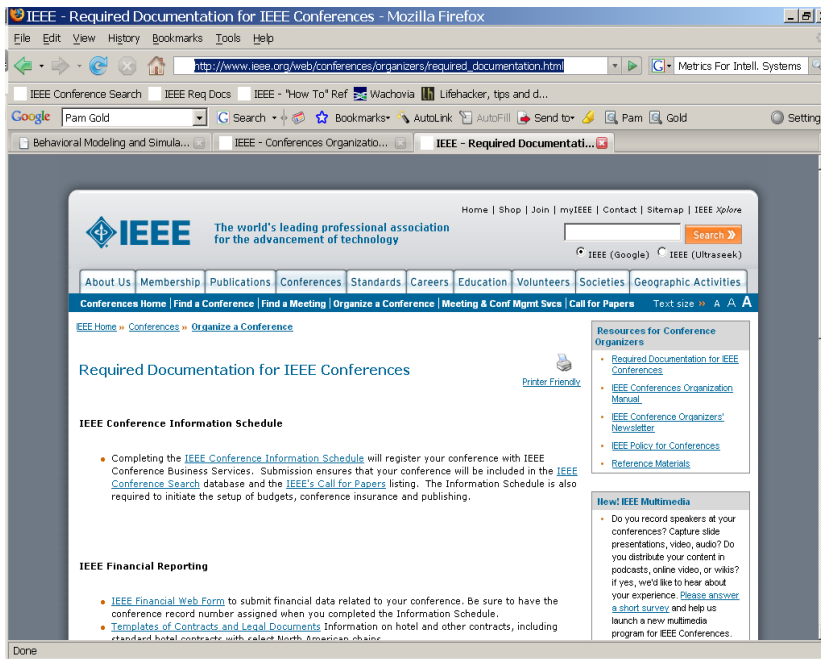
# 24-18 months **BEFORE** start date

## (Conference Business Services)

- Appoint General Chair and Conference Committee
- Contact local IEEE Section of where the conference will be held

# 24-18 months BEFORE start date (Conference Business Services)

- Complete and submit Conference Information Schedule & Committee List



The screenshot shows a Mozilla Firefox browser window displaying the IEEE website. The page title is "IEEE - Required Documentation for IEEE Conferences". The main content area is titled "Required Documentation for IEEE Conferences" and includes a section for the "IEEE Conference Information Schedule". This section contains a bulleted list of instructions for completing the schedule, including details about submission, the IEEE Conference Search database, and the IEEE's Call for Papers listing. There are also links for "IEEE Financial Reporting" and "Resources for Conference Organizers".



The screenshot shows a Mozilla browser window displaying the IEEE website's "Organize a Conference" page. The page title is "http://ta.ieee.org - Organize a Conference : Conference Information Schedule". The IEEE logo is prominently displayed at the top. Below the logo, the heading "Conference Information Schedule" is followed by a welcome message: "Welcome to the IEEE Conference Information Schedule! This form will take approximately 10-15 minutes to complete. To expedite the process, please have the following information with you, conference title, dates, location, website URL, sponsorship, contacts and committee lists (if available)." Below this message, there is a prompt: "Please enter your name, phone number and e-mail address to begin." This is followed by three input fields for "Name:", "Phone", and "Email", and a "Begin" button. At the bottom of the page, contact information for IEEE Conference Business Services is provided, including the address (445 Hoes Lane, Piscataway, NJ 08854-4141), email (conference-services@ieee.org), phone number (+1 732 562 3878), and hours (8:00 AM - 4:30 PM EDT).

# 24-18 months BEFORE start date (Conference Business Services)

## Conference Information Schedule & Committee List

http://ta.ieee.org - Organize a Conference : Conference Information Schedule - Mozilla Firefox

[Click here for Instructions](#) Questions? Please contact +1 732 562 3878 or email [conference-services@ieee.org](mailto:conference-services@ieee.org)

To ensure a successful submission, please avoid copying and pasting data. See Instructions above for more details.

**\* Required Field**

GENERAL INFO					
* Full Title of Conference	<input type="text"/>				
Conference Acronym	<input type="text"/>	* Conference Start Date	<input type="text"/>	* Conference End Date	<input type="text"/>
Conference Location	<input type="text"/>				
City	<input type="text"/>	Country Please Select	State / Province	* Estimated Attendance	<input type="text"/>
* Conference Scope (50 words max)	<input type="text"/>		* Conference Keywords (5-8 Keywords separated by commas)	<input type="text"/>	
Conference Focus	Check all that apply <input type="checkbox"/> Application <input type="checkbox"/> Scientific /Academic <input type="checkbox"/> Other	Exhibits <input type="radio"/> Yes <input checked="" type="radio"/> No	No. of exhibits, if any <input type="text"/>	Tutorials	<input type="radio"/> Yes <input checked="" type="radio"/> No
Conference URL	<input type="text"/>	Are you producing a Conference Publication?	<input type="radio"/> Yes <input checked="" type="radio"/> No	Call for Papers URL	<input type="text"/>

Done

# **24-18 months BEFORE start date**

## **(Conference Business Services)**

### **Conference Information Schedule & Committee List**

- Registers your conference with the IEEE
- Initiates insurance, budget and publishing processes
- Sponsorship Confirmation with IEEE OUs
- Policy 10.1.16 – Naming of IEEE Conferences
- Policy 10.1.17 – Use of the IEEE Logo



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### Conferences Menu

Find a Conference

▼ Organize a Conference

Conference Set-up & Approval

Financial Management & Reporting

Technical Program

Conference Publications

Registration

Panel of Conference Organizers (POCO)

Conference Organizers' Manual

Required Documentation

Additional Resources

Services

Browse Call for Papers

Buy a Conference Proceeding

[IEEE Home](#) » [Conferences](#) » [Organize a Conference](#)

## Services Available to IEEE Conference Organizers



These departments within IEEE offer services to IEEE Conference Organizers at competitive rates.

On this page:

- [Computer Society Press](#)
- [eXpress Conference Publishing](#)
- [Internal & Operations Audit](#)
- [Meeting & Conference Management](#)
- [Teleconferencing Services](#)
- [Web Conferencing Services](#)

### Computer Society Press

[www.computer.org/cps](http://www.computer.org/cps)

The IEEE Computer Society's Conference Publishing Services (CPS) produces high-quality, peer-reviewed conference publications in print, digital and online products. Our mission is to utilize the CPS staff's 60+ years of aggregated experience to make the whole publishing process as simple and pain-free as possible for conferences while producing the

#### Contact Computer Society Conference Publishing Services

- Phone: +1 714 821 8380
- E-mail: [cps@computer.org](mailto:cps@computer.org)

#### Contact eXpress Conference Publishing

- Phone: + 1 732 562 3890
- E-mail: [conferencepublishing@ieee.org](mailto:conferencepublishing@ieee.org)

#### Contact Meeting & Conference Management

- Phone: +1 732 981 3428
- E-mail: [mcminfo@ieee.org](mailto:mcminfo@ieee.org)

#### Contact Web Conferencing Services

- Phone: +1 732 981 3441
- Email: [web-conf@ieee.org](mailto:web-conf@ieee.org)

# LIST OF 2009 IEEE R10 Conferences in [www.ieee.org](http://www.ieee.org) calendar of events- some examples

[2009 First International Conference on COMMunication Systems And NETworks \(COMSNETS 2009\)](#) [05 Jan - 10 Jan 2009](#)

[2009 International Bhurban Conference on Applied Sciences and Technology \(IBCAST\)](#) [05 Jan - 08 Jan 2009](#)

[2009 International Conference on Web Intelligent Systems \(ICWIS\)](#) [08 Jan - 10 Jan 2009](#)

[2009 International Conference on Emerging Trends in Computing \(ICETiC\)](#) [08 Jan - 10 Jan 2009](#)

[2009 Asia-Pacific Magnetic Recording Conference \(APMRC\)](#) [14 Jan - 16 Jan 2009](#)

[2009 Asia and South Pacific Design Automation Conference ASP-DAC 2009](#) [19 Jan - 22 Jan 2009](#)

[2009 Australian Communications Theory Workshop \(AusCTW\)](#) [04 Feb - 06 Feb 2009](#)

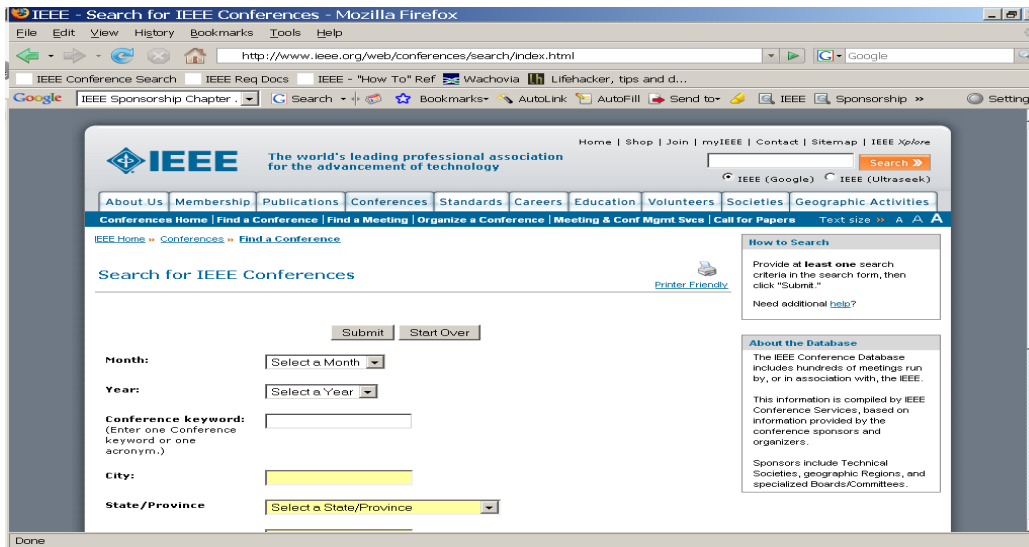
[2009 15th Korea-Japan Joint Workshop on Frontiers of Computer Vision \(FCV2009\)](#) [05 Feb - 07 Feb 2009](#)

[2009 IEEE International Conference on Industrial Technology - \(ICIT\)](#) [10 Feb - 13 Feb 2009](#)

# 24-18 months BEFORE start date (Conference Business Services)

## Conference Information Schedule & Committee List

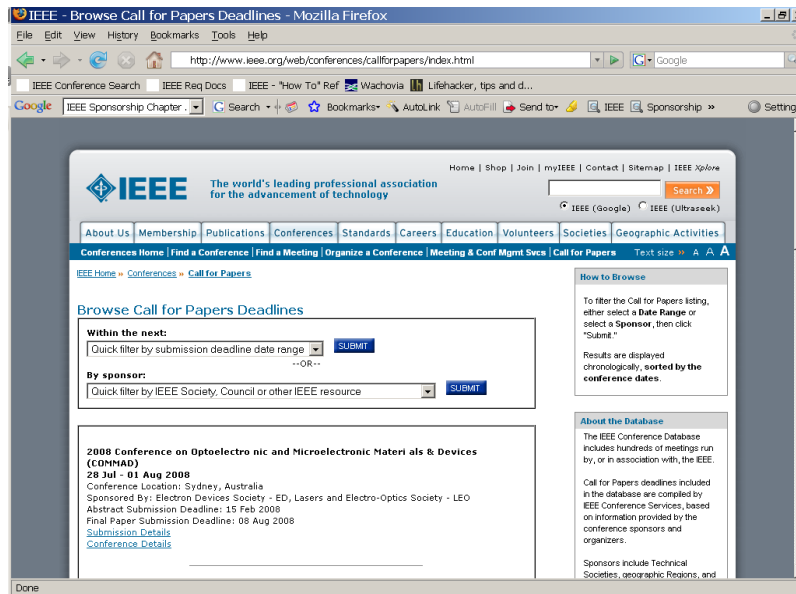
- Conference number
- IEEE Conference Search



The screenshot shows the IEEE Conference Search page in a Mozilla Firefox browser window. The browser's address bar displays the URL <http://www.ieee.org/web/conferences/search/index.html>. The page header includes the IEEE logo and the tagline "The world's leading professional association for the advancement of technology". A navigation menu at the top lists various categories: About Us, Membership, Publications, Conferences, Standards, Careers, Education, Volunteers, Societies, and Geographic Activities. Below this, a secondary menu offers options like "Conferences Home", "Find a Conference", "Find a Meeting", "Organize a Conference", "Meeting & Conf Mgmt Svcs", and "Call for Papers". The main content area is titled "Search for IEEE Conferences" and features a search form with the following fields: "Month" (a dropdown menu), "Year" (a dropdown menu), "Conference keyword:" (a text input field with a note: "Enter one Conference keyword or one acronym."), "City:" (a text input field), and "State/Province" (a dropdown menu). To the right of the search form, there are two informational boxes: "How to Search" and "About the Database". The "How to Search" box provides instructions on using the search form and includes a "Submit" button. The "About the Database" box explains the scope of the IEEE Conference Database and lists various sponsors.

# 24-18 months BEFORE start date (Conference Business Services)

- Browse Call for Papers Deadlines



- Updates/changes can be e-mailed to [conference-services@ieee.org](mailto:conference-services@ieee.org)

# Conference Business Services

## Need Help?

### Coordinator, Conference Operations

Cheryl A Smith

IEEE Technical Activities

Conference Business Services Department

[c.a.smith @ieee.org](mailto:c.a.smith@ieee.org)

Conference Related General Inquiries

Phone: +1 732 562 3878

E-mail: [conference-services@ieee.org](mailto:conference-services@ieee.org)

# 24-18 months BEFORE start date

## (Conference Contracting)

- Set Forth The Relationship Of All Parties  
Establish Memorandum of Understanding (MOU)  
[if applicable]
- Contact Conference Management Company  
Enter into contract negotiations [if applicable]
- Select Site  
Enter into contract negotiations [if applicable]

# Conference Contracts

*MOUs Policy and Templates*  
*Hotel Contracts*

# Need Help? (Conference Contracts)

Templates of Contracts and Legal Documents

[www.ieee.org/web/conferences/organizers/contracts.html](http://www.ieee.org/web/conferences/organizers/contracts.html)

MOUs

<http://www.ieee.org/web/conferences/organizers/MOU.html>

E-mail: [conference-contracts@ieee.org](mailto:conference-contracts@ieee.org)

# Organizers Perspective

*Planning Your Conference Event*

# **From the Organizers Perspective**

*(White related area on detailed checklist)*

**Manager, Conference Planning  
Meeting & Conference Management**



# 18 - 15 months BEFORE start date

## (Organizers Perspective)

- Send RFP to Exhibit Decorators & Develop exhibitor prospectus
- Reach out to Educational Institutions, Corporations, Government & Industry for support
- Apply for Grants

# 15 - 12 months BEFORE start date

## (Organizers Perspective)

- Identify Paper Management System
- Determine Technical Program & Establish abstract/paper deadlines
- Establish Call For Papers
- Update Conference Website with CFP

# 15 - 12 months BEFORE start date

## (Organizers Perspective)

- Establish Visa Process (encourage attendees to apply for visas early)
- Promote CFP and Exhibitor Prospectus at the current year's conference
- Review and confirm hotel meeting space and room block is still accurate based on history
- Meet with previous year's conference committee to discuss best practices

# 12 - 9 months BEFORE start date

## (Organizers Perspective)

- Create website link for paper submission site. Make sure to clearly publicize:
  - Paper Submission Criteria & Instructions
  - Publication Schedule & Deadlines
  - Copyright Agreement
  - FAQ's
- e-notice mailing (if approved)

# 9 - 6 months BEFORE start date

## (Organizers Perspective)

- Create Registration form & establish registration collection that is PCI compliant
- Plan social activities & tour program
- Send out RFP's for ground transportation

# 6 – 4 months BEFORE start date

## (Organizers Perspective)

- Launch Registration Site
- Complete paper review process, finalize technical program, notify speakers
- Create & publish Advanced Program

# 4 - 3 months BEFORE start date

## (Organizers Perspective)

- Solicit bids from printers and/or CD manufacturers based on accepted papers
- Order attendee giveaways, speaker gifts and other conference gift items
- Determine preliminary exhibitor space assignments
- Request weekly reports from hotels

# 2 months BEFORE start date

## (Organizers Perspective)

- Review room block with hotel against attendance and contracts
- Complete & print final program, advertising & registration reminders
- Develop & finalize volunteer job functions/onsite needs

# 6 - 4 weeks BEFORE start date

## (Organizers Perspective)

- Early Registration Deadline
- Send preliminary specs to venue/hotel
- Ship Final Program to conference site
- Submit Pre-Conference Forecast
- Review shipping dates, customs if applicable (allow enough time to ship materials to conference)

# 2 days BEFORE start date

## (Organizers Perspective)

- Confirm onsite logistics
  - Venue/Hotel
  - Meet with suppliers/vendors (i.e.. transportation company)
  - Meet with committee/volunteers to review onsite responsibilities
- Set-up registration area, exhibit space, information booth & office area

# During Conference

## (Organizers Perspective)

- Onsite Registration
- Monitor Budget
- Monitor daily activities
- Hold Post Conference/Wrap Up Meeting with
  - Committee
  - Venue/Hotel
  - Other Vendors

# AFTER

## (Organizers Perspective)

### 1 Week After end date

- Committee Members submit final statistics and lessons learned to Conference Chair

### 20 Days After end date

- Registration clean up process (process refunds, receipts, balance dues)

# 1 Month AFTER end date (Organizers Perspective)

- Process Outstanding Bills
- Update Conference History

# Need Help? (Organizers Perspective)

IEEE Meeting & Conference Management

<http://www.ieee.org/go/mcm>

E-mail: [mcm-info@ieee.org](mailto:mcm-info@ieee.org)

# Conference Finance

*(Green related area on detailed checklist)*

**Supervisor  
Conference Finance**

**Pete Staecker**  
**IEEE Treasurer**



# 24-18 months BEFORE start date

## (Conference Finance)

- Review **IEEE Insurance coverage** (determine if additional coverage is required)
- Review **tax information** to ensure IRS and international compliance-VAT (Value Added Tax) and GST (Goods and Services Tax)

# 15-12 months BEFORE start date

## (Conference Finance)

- **Submit conference budget** with written IEEE OU approval(s) for IEEE headquarters review and approval
  - Example: 2 IEEE OUs and 1 outside entity financially sponsoring. An email from each of the 2 IEEE OUs needed stating approval.
- General Chair and Finance Chair/Treasurer must complete and submit **POBC/COI forms**
- Submit updated **committee list**, if applicable
  - If updates were made since previous submission
  - If not submitted with information schedule
    - Committee list facilitates insurance coverage of individuals acting on behalf of the conference
- Establish **conference bank account for** receipt and disbursement of conference funds
  - Concentration Banking
  - **Local Bank in Conference Name:**
    - Template: The IEEE, Inc., d/b/a Year IEEE Conference Title
    - Example: The IEEE, Inc., d/b/a 2008 IEEE POCO
  - University Ledger account etc.
    - Fiscal MOU needed

# Up to the conference

## (Conference Finance)

- **Request and obtain loan from IEEE sponsoring Organizational Unit (OU), if needed**
  - IEEE OU sends email to [conference-finance@ieee.org](mailto:conference-finance@ieee.org) stating:
    - Amount of loan
    - Where it is to be sent
    - Type of transfer
      - Check
      - Wire
      - Transfer from IEEE GL to CB account
  - Wire Transfer Request form can be used
    - Accessible on Required Documents web page  
[http://www.ieee.org/web/conferences/organizers/required\\_documentation.html](http://www.ieee.org/web/conferences/organizers/required_documentation.html)

# By November 30<sup>th</sup> each year

## (Conference Finance)

- **Submit Pre or Post forecast**
  - Online financial web form

# Between set up and close of conference (Conference Finance)

- **Secure W-8 and/or W-9 forms for tax compliance**

Individuals receiving payment from IEEE must complete either a W-8 and/or W-9 forms.

# No later than January 10th of each year (Conference Finance)

- Complete **1099 and 1042** schedule of payment **forms** for all payments made in the **previous calendar year**. If no payments were made, 1099 and 1042 should still be submitted indicating "NONE"
  - 1099 for all conferences worldwide
  - 1042 for U.S. conferences only
- Submit **annual report on foreign bank accounts** to IEEE Tax Dept.
  - Name and address of bank
  - Amount in the account
  - Interest earned for the year

# 6-4 weeks BEFORE start date

(Conference Finance)

- **Submit Pre Conference forecast**  
(unless already done during last quarter of the calendar year)

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## 1 month AFTER end date

- **Repay all loans**
- **Submit Post Conference forecast**  
(unless already done during last quarter of the calendar year)

# 3 months AFTER end date

## (Conference Finance)

- **Distribute surplus**  
(to all financial sponsoring entities)
- **Close conference bank account & submit proof of account closure**
  - **Examples:**
    - **CB account**
      - Destroy Check form
    - **Local Bank account**
      - Last statement showing zero balance
    - **University ledger account**
      - Letter stating account is closed

# 4-5 months AFTER end date

## (Conference Finance)

- Prepare and **submit all audit material** to independent auditor

# 3-6 months AFTER end date

## (Conference Finance)

- **Submit Final Financial report with Certification of Accuracy**  
(Also submit copy of audit report if outside auditing firm conducted the audit)

# Presentations on Conference Finance at POCO Series

Finances and Closing  
Your Conference

*(Topic covered during  
General Session)*

Finance Intensive  
Conference Workshop

Two, 1-hour sessions held

# Need Help?

## (Conference Finance)

Kevin Uherek

Direct Phone: +1 732 562 3876

[k.uherek@ieee.org](mailto:k.uherek@ieee.org)

Conference Related General Inquiries

Phone: +1 732 562 3876

E-mail: [conference-finance@ieee.org](mailto:conference-finance@ieee.org)

# Conference Publications

*(Orange related area on detailed checklist)*

**Strategic Program Development**

**Sr. Manager, IEEE Meetings & Conferences**



# 12-9 months BEFORE start date (Conference Publications)

- Submit Conference Publication Form
  - THIS IS THE KEY STEP IN THE PROCESS!
  - Results in Letter of Acquisition (LoA), which provides Pub Chair (or designee) with key information:
    - International Standard Book Numbers (ISBNs)
    - International Standard Serials Number (ISSN), if applicable
    - IEEE Catalog Number
    - Library of Congress Number
    - Content submission requirements
    - Copyright information
    - Delivery details
    - Estimated payment information
    - More
  - Info at Online Resource Center for Conference Publication Organizers ([www.ieee.org/confpubcenter](http://www.ieee.org/confpubcenter))
    - Under “Information for Use when Interacting with IEEE”

# 12-9 months BEFORE start date

## (Conference Publications)

- Register for IEEE PDF eXpress site
  - Optional (yet highly recommended), free tool (no charge to conference or authors) that allows conference organizers and authors to prepare IEEE Xplore-compatible PDFs
  - Only conferences that have completed the acquisition process are eligible to register for site
  - Only organizers or their designees can request site (not authors or others)
  - Info at Online Resource Center for Conference Publication Organizers ([www.ieee.org/confpubcenter](http://www.ieee.org/confpubcenter))
    - In left navigation bar
  - Also at [www.ieee.org/pdfexpress](http://www.ieee.org/pdfexpress)

# 12-9 months BEFORE start date (Conference Publications)

- Register to use the IEEE Electronic Copyright Form (eCF)
  - Optional (yet highly recommended) free tool available to conferences that are using an online author-manuscript submission system
  - Helps facilitate the copyrights process
  - Info at Online Resource Center for Conference Publication Organizers ([www.ieee.org/confpubcenter](http://www.ieee.org/confpubcenter))
    - Under “Information for Use with the Author Community”
  - Also at [www.ieee.org/copyrights](http://www.ieee.org/copyrights)

# 4-3 months BEFORE start date

## (Conference Publications)

- Organize and prepare for production of conference publication
  - Identify/contract with production vendor
  - Determine formats (CD? DVD? Print? Other?)
  - Ensure information provided in LoA is included in final publication
  - More support info at Online Resource Center for Conference Publication Organizers ([www.ieee.org/confpubcenter](http://www.ieee.org/confpubcenter))
    - Under “Information for Use with Vendors/Volunteers Who are Handling Production”

# Just Prior to Start Date

## (Conference Publications)

- Complete production of conference publication
  - Ensure publication is available for onsite distribution
    - Note: Some conferences do not make content available onsite and instead produce a post-proceedings. In those cases, organization/preparation/production may occur on a different timetable
  - Distribution of publication must not occur prior to start date of conference
    - Distribution prior to conference can lead to legal concerns
      - Patent disputes
      - ITAR or copyright violations
      - Other

# 1 week AFTER start date

## (Conference Publications)

- Submit content to IEEE
  - Follow instructions in LoA regarding submission requirements and delivery
  - TIMELINESS OF CONTENT DELIVERY IS MAJOR ISSUE FOR IEEE
    - Timeliness impacts many things, including how often your content is accessed
  - No payments made to conference until content is received

# Need Help?

## (Conference Publications)

- Contact IEEE Conference Content Management staff
  - ConfPubs@ieee.org
  - Will provide direct support for issues they manage or will direct you to appropriate contact(s)
- Visit Online Resource Center for Conference Publication Organizers ([www.ieee.org/confpubcenter](http://www.ieee.org/confpubcenter))
- More information being presented during POCO General Session, workshops and demos

# Conference Publications

## (Presentations at POCO)

Conference Proceedings:  
Making Your  
Conference A Part of  
the Future

*(Topic covered during  
General Session)*

Proceedings In-Depth  
Conference Workshop

(Two, 1-hour sessions  
held)

# OTHER ISSUES OF IMPORTANCE

# ISSUES OF CONCERN

- **Low quality papers**
  - Need to improve reviewing process
  - Identify IPC members who have good technical background (work with Technical Activities Coordinator)
  
- **Plagiarism**
  - Conference organizer must be strict on this
  
- **Provide Technical Co-Sponsorship by R10**
  - Have supported a few Conferences organized by R10 OUs for 2009 and 2010 by part sponsor or technical co-sponsor

# ISSUES OF CONCERN

## Committee on Technical Co-Sponsorship

- **Technical Co-Sponsorship Ad Hoc Committee**
- The committee is to identify options to increase the positives and decrease the negatives of IEEE technical co sponsorship. There is currently a lack of agreement on how and when technical co-sponsorship should be used. In addition, the guidelines for technical co sponsorship are unclear. The use of technical co-sponsorship has increased over the past few years. **Some technically cosponsored conferences compete with existing conferences offered by the societies/councils, some use the IEEE logo and Xplore while the surplus generated goes to non-IEEE entities, and, at least one tech cosponsored conference chair has stated that he provides a forum for articles that were rejected by an IEEE financially sponsored conference (and his conference articles go into Xplore).** The full extent of the problem is not yet understood.
- **Members**  
Tommy Mayne, Chair, Tom Habetler, Roberto de Marca, Deb Cooper, David Hodges, and Gerald Engel
- **Staff** : Susan Root, IEEE Conference Services (Committee Support)

# Grant from Xplore (Email to Pat Thompson)

- - (1) How do we (conference organizer) make arrangements for Xplore acquisition of our proceedings? Do we need to apply in advance? To whom? –
- As done previously, **you must submit the IEEE Information Schedule and IEEE Conference Publication form at least six months prior to the conference taking place.** All conferences accepted into the IEEE Conference Publication Program (aka Book Broker Program) are loaded into Xplore. You will need to go to the following URL to obtain these forms and submit them:  
  
[http://www.ieee.org/web/conferences/organizers/required\\_documentation.html](http://www.ieee.org/web/conferences/organizers/required_documentation.html)  
-- Conference Organizers Page

# (Continued)

- (2) Is Xplore acquisition the same as the previous Book Broker Program? I used to organize TENCON2000 conference and it was under the book broker program and we were paid some money for the proceedings. Could you clarify?
- The Book Broker Program is now called "IEEE Conference Publication Program". The same processes are in effect. The acquisition payment is now based on number of papers and the financial involvement from an IEEE Organizational Unit.
  - The conference must submit an Xplore CD (this is mandatory) in order to receive an acquisition payment.
  - The conference is paid \$25.00 per paper if the IEEE Organizational Unit is 100% financially sponsoring the conference. If the conference is now full financially sponsored, the acquisition payment is pro-rated based on the amount of financial sponsorship. If the conference is only technically sponsored by an IEEE Organizational Unit, the conference receives a flat acquisition payment of \$1,000.00.

# THANK YOU

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