

10 Steps to Organizing a Successful Conference

F. Dong Tan, VP-Meetings

As your vice president for meetings, one of the questions that is frequently asked of me is: how do I organize a meeting or a workshop that is sponsored by PELS? As a conference organizer, you have two obligations. The first obligation is to your attendees that you will make their trip worthwhile by providing unparalleled technical information exchange and by providing opportunities for professional education. The second obligation is to the IEEE and the PELS by ensuring the conference is conducted with highest standards of ethics. Here is a list of 10 steps that you need to follow to organize a successful conference or workshop.

1. Get a group of people together

To organize a successful conference or workshop requires a group of dedicated volunteers who share the same technical interests. It is generally a good practice to invite a few people who have participated in similar efforts and in leadership positions before, since a conference organization is relatively loose and its success is totally dependent on each and every individual's ability to make things happen on his or her own.

2. Select a topic, a site, and a time

Once you have a group of dedicated people, you can decide on a topic and site. The topic can be any one of the existing conferences — such as APEC, PESC, INTELEC, to name a few — or a totally new subject that is sanctioned in PELS' technical charter, particularly in the areas of emerging technologies.

Site selection is important for the success of an event. They should include considerations for hotel room rate, conference rooms and facility usage, local industry, weather, easy access from major airports, etc.

Time selection is also important for you to succeed. Currently, there are many conferences in power electronics, many of which are well established. You need to avoid a time conflict with existing conferences. PELS maintains a master list on its web site of all the conferences and workshops that PELS sponsors.

3. Put together a budget

Next you need to ensure a surplus to the sponsoring society—in our case, PELS. The surplus is a major part of PELS' operating fund and it directly impacts the financial health of PELS. A general guideline for each organizer of a PELS-sponsored event is to produce a surplus of 15 to 20% of the total operating budget. An Excel spreadsheet is available from IEEE for estimating conference financials. You should send your budget to PELS Executive Director, Meetings Committee Secretary, Vice President for Meetings, or President.

4. Submit a request

Once you have the basic information on technical topic, site and time, you need to submit a formal request to PELS. The submission should be made to, in order of preference, PELS Executive Director Bob Myers (bob.myers@ieee.org), Meetings Committee Secretary, Vice President for Meetings, or President.

If you request a conference or workshop that is new to PELS, the request package must include the following, as stipulated in the IEEE Meetings Organization Manual:

- Conference Information Schedule

- Request for Conference Insurance
- IEEE Conference Publication Form
- IEEE Conference Financials

The conference information schedule is the place for you to provide the basic information of the conference such as organizer(s), sponsoring society, conference committees, etc. and to list the event on the IEEE Conference Search Page on the IEEE website. The request for conference insurance is designed to protect IEEE volunteers from liabilities that may occur during a conference. The IEEE publication form allows you to join the IEEE Book Broker program to take advantage of IEEE marketing muscle for technical publications. The IEEE conference financial is a spreadsheet that is used for planning the financial aspects.

5. Obtain formal approval

Once you have the basic information, you need contact PELS Executive Director Bob Myers (bob.myers@ieee.org), the Meetings Committee Secretary, or Vice President for Meetings so that your conference request will be discussed during the next meeting committee meeting. The meetings committee usually convenes twice in a year. The first usually coincides with APEC and the second usually happens at INTELEC (or with IAS annual meeting if INTELEC if outside US).

Your budget needs to be approved by Meetings Committee and then the PELS AdCom before you can get any cash advance to cover the cost for advanced planning activities.

6. Form a technical review committee

The next step is to form a technical committee and invite reviewers to develop a technical program. All major PELS sponsored conferences and workshops maintain a database of reviewers. You can contact the Executive Director of individual conference chairs(s) for permission to use them.

Developing a technical program demands a lot of time from the technical program chair. The tasks include a call for papers in advance, recruiting reviewers, classification and assignment of digests to reviewers, chairing a technical program meeting to finalize the program, appoint session chairs, and coordination with IEEE and conference management team (if any) to ensure all papers get to the printer on time and in the required format.

7. Execute the plan

During the conference, the conference chair needs to maintain constant communication with the hotel, the conference facility, and the conference management team (if any) to make sure things are on schedule. A conference chair needs to pay close attention to make sure the on-site spending does not adversely impact the final budget numbers.

A program chair needs to make sure all the authors are presenting and record those no-show papers if any. Coordinate with session chairs to make sure they show up on time for their sessions and synchronize each session to maximize the opportunity for attendees to switch session for their desired presentations.

8. Draft an interim final report

Four weeks after the completion of a conference or a workshop, the chair needs to draft an interim report. This report is primarily focused on financials, together with a summary of other activities. The interim report should be sent to the Executive Director who can then forward it to appropriate parties. The conference chair should also report it at the next Meeting Committee meeting.

9. Perform a financial audit

When all the financial transactions are closed, the conference treasurer or the conference chair needs to perform an audit of their financials before it is submitted for final closure. IEEE requires that any conference or workshop with income or expenses exceeding \$100,000 (US) undergo a formal audit by an independent professional auditor.

10. Close the conference by submitting a final report

All IEEE sponsored meetings need to be closed within one year from the date of the meeting. A final report must be received and approved by the IEEE Conference Services and the PELS Vice President for Meetings. The final report should include the submittal of a final conference report, conference surplus, payment of outstanding loans, and if necessary, an independent audit certified by a CPA. IEEE is available to conduct the independent audit and requests should be made through IEEE Conference Services.

IEEE has instituted a cash penalty for any meeting that is not closed in one year from the date of the conference or workshop, so it is incumbent on the conference chair and the treasurer to close the conference in time. PELS meetings committee monitors the closure of each meeting regularly to ensure timely closures of our conferences and workshops.

Dong Tan
VP for Meetings
dong.tan@ngc.com