# IEEE Region 3 SoutheastCon Operations Manual

April 17, 2020

# Region 3 IEEE SoutheastCon Operations Manual

# Contents

# Region 3 IEEE SoutheastCon Operations Manual

**Revision History**

| Revision | Date | Comments/Changes |
|---|---|---|
| REV - | April 20, 2020 | Released |
| | | |
| | | |
| | | |
| | | |

# Region 3 IEEE SoutheastCon Operations Manual

## 1.    What is IEEE SoutheastCon?

IEEE SoutheastCon is an annual conference hosted each spring within Region 3 of the IEEE.  Each year the conference is hosted by a different local host entity (Section, Area, or Council).  During SoutheastCon three distinct concurrent events are held:

1) A Student Conference attended by most of the technical Universities within the Region.  The student conference includes several competitions including: Hardware, Software, Presentations, Ethics, Poster, T-Shirt, and Website.
2) A Technical Conference attended by people from all over the world.  The technical conference includes the presentation of refereed papers by the authors and may also include poster sessions for papers accepted as abstracts.
3) Region 3 Annual Meeting attended by Region 3 leadership.  This meeting is planned and run by Region 3 leadership.

The conference is co-sponsored by IEEE Region 3 and a local IEEE Organizational Unit (OU) with half of the surplus going to Region 3 and the other half going to the local OU.  A Memorandum of Understanding (MOU) is written between the local OU and Region 3 such that the Region 3 is responsible for all losses for the conference.  This means that the financial risk of running the conference is upon the Region.  However, this also means that Region 3 has administrative oversight of the conference.

As a cosponsor of the Conference, Region 3 will supply resources necessary to handle the logistics of operating the Conference.  This includes, but is not limited to:

● Site Selection
● Registration System and Supplies
● Paper Submission System

Additionally, the IEEE Center for Leadership Excellence (CLE) offers a 'one stop' training solution designed to serve the multiple and diverse range of IEEE user communities. From volunteers, non-volunteers to students, members, and conference organizers, the site offers a simpler and effective learning experience.

## 2.    Advantages of Hosting IEEE SoutheastCon

Hosting an IEEE SoutheastCon is an opportunity for a Section, Council, or Area, in conjunction with a local student branch (or branches) to generate extra revenue for the local entities and student branches while having the opportunity to network with other IEEE members and the local community.  It gives the local entity the opportunity to run a US$100K+ conference without the fear of financial loss or burden and the student branch the opportunity to manage a student competition.

IEEE SoutheastCon benefits IEEE Members in the local section, region, and worldwide.  IEEE members world-wide are provided the opportunity to network with peers in IEEE, as well as an opportunity to attend and present at a technical conference.  This is particularly beneficial to local members, who can attend a technical conference close to home. The conference also engages the local members by allowing them to volunteer to support various aspects of the conference according to their interests. Students have the opportunity to participate in the student competitions, attend some of the meetings, and to engage with the professionals.  Through local announcements and social media posts, the conference increases the visibility of the IEEE membership within the local community.  Lastly, the conference provides value to the IEEE membership by offering reduced rates to members and providing

volunteering opportunities.

# 3.     What are the Goals for IEEE SoutheastCon?
There are many goals that IEEE SoutheastCon hopes to accomplish.

- Member Continuing Education through the presentation of papers, posters, and tutorials.
- Membership Growth opportunities through the inclusion of non-members in the conference and differential fees.
- Volunteer Education through Region 3 meeting and volunteer education programs.
- Local Section Vitalization through the engagement of volunteers in the planning and execution of the conference.
- Region 3 and Local Organization financial support through distribution of the surplus.
- Student Membership engagement through the student competition and programs.
- Student Membership growth through student networking and competition.
- IEEE Affinity Groups (Young Professionals, Women in Engineering, Life Members, …) engagement through networking and professional tutorial and workshops
- Industry engagement through contributions and exhibits

# 4.     What are the Requirements for Hosting IEEE SoutheastCon?
Prior to starting the hosting process, you must confirm with Region 3 Conference Committee Chair that the year of interest is available for hosting.  Generally, the conference is awarded 3-5 years in advance.  Also, it is highly recommended that the material on the IEEE website be reviewed so that the rules and requirements for hosting an IEEE conference are clearly understood.  IEEE provides a host of resources to assist IEEE Organizational Units interested in hosting conferences.  It is highly recommended that prospective Sections interested in hosting a conference to review information available at https://www.ieee.org/conferences/organizers/organizers-index.html.   IEEE Meetings, Conferences, & Events (MCE) also provides additional resources and webinars (https://ieeetv.ieee.org/event-showcase/events) which provide valuable information to conference organizers.

## 4.1.  Site Selection
The Region 3 Conference Committee will perform a site selection survey at least 3 years prior to the start of the Conference.  If no local entities have volunteered to host, then Region 3 will research and select sites for the Conference.  Region 3 Conference Committee will survey at least 3 locations to host the Conference.  Region 3 Conference Committee will research local hotels and conference venues capable of hosting the Conference and will ultimately create a proposal to host the conference to Region 3 Committee.  Having Region 3 Committee handle this process will ensure that we select properties capable of hosting the Conference.

 A local entity may express interest in hosting and provide recommended locations that meet the following requirements; however, the ultimate site survey and selection will be performed by the Region.  As of 2017 in order to host a SoutheastCon with at least 800 attendees the hotel should meet the following specifications:

- Conference Days:  Thursday – Sunday (Friday – Sunday during Section Congress years)
- Conference Dates:  Mid-March to Mid-April (Excluding Holy Week)
- Total Conference Space:  25,000 ft$^2$ (2,325 m$^2$)
- Largest Ballroom Size:  10,000 ft$^2$ (930 m$^2$)

- Secondary Ballroom Size:  7,500 ft$^2$ (700 m$^2$)
- Peak Breakout Rooms (w/Ballrooms all divided):  20
- Note:  The hardware competition space needs 7,000 – 10,000 ft$^2$ of dedicated space starting Noon Thursday for setup and open Friday – 16:00 Saturday.
- Total Rooms Nights:  675
- Peak Room Night:  325 (Friday and Saturday)
- Total Onsite Attendees: 800 - 1,000
- Average Food & Beverage Spend: $100,000

In addition, other factors that should be taken into account are:

- Wireless Internet Access throughout function space
- Distance from Airport and method of transfer
- Room cost
- Meal cost
- Location
- Accommodations for MOVE truck access adjacent to venue for parking and training.  A request for availability of MOVE at your conference should be submitted through MOVE Request Form.

## 4.2.  Proposal to Host

If a local entity is interested in hosting a SoutheastCon, they should inform Region 3 Conference Committee.  Region 3 Conference Committee will add the local entity to the list of potential hosts for a future SoutheastCon.  The Region 3 Conference Committee will research the potential host venues available to the local entities and generate a proposal to be submitted to Region 3 Committee. Region 3 Conference Committee will investigate at least 3 potential host sites for each SoutheastCon.

In addition to notifying Region 3 Conference Committee of the local entities of interest, providing the following information will greatly improve your chance of being selected:

- Identify your core volunteers (Conference Chair, Program and/or Paper Chair, Treasurer, Student Chair) (Refer to Section 5.3 for recommended volunteer positions)
- Get a commitment from the local university(ies)
- Provide some background about the location that we won't get from the Convention and Visitor's Bureau (e.g. Things to Do of Interest to Engineers...)
- Provide a list of potential local contributors and reach out to gauge interest in supporting the conference.
- Provide a list of potential off-site programs that would be of interest to the attendees (off-site reception and/or awards).
- Provide a list of venues that might not show up on a normal search (See venue requirements below).  This may include options for hosting various competitions.  Keep in mind that if multiple venues are used it will be necessary to include information relating to distance and method of travel between the venues.
- Provide information relating to:
  - o Transportation Costs
  - o Parking Costs
  - o Local Airports

## 4.3.  Branding

The official name of the conference is "IEEE Region 3 SoutheastCon <yyyy>" (where <yyyy> is the year of the conference e.g. "IEEE Region 3 SoutheastCon 2021").  The advertised website for the conference MUST be http://www.ieeesoutheastcon.org/.  This website will point and redirect to each year's

conference and give returning attendees a consistent location to visit to find the conference from year to year.

All materials generated by the conference that use the IEEE Master Brand, must meet the IEEE Master Brand guidelines as specified at: http://www.ieee.org/about/toolkit/index.html. This includes any gift bags or shirts created for the conference.

# 5. Post-Selection Processes

## 5.1. Submit IEEE Corporate Required Documentation

Once you have been selected to host, you must submit the required documentation to IEEE Corporate. Visit http://www.ieee.org/conferences_events/conferences/organizers/setup_approval.html for the current list of required documentation.

### 5.1.1. Principles of Business Conduct/Conflict of Interest (POBC/COI)

These forms must be filled out by the general chair and conference treasurer. This form can be found at: http://www.ieee.org/about/corporate/compliance/index.html.

### 5.1.2. Memorandum of Understanding (MOU)

IEEE Region 3 is the owner of IEEE SoutheastCon. Region 3 Committee grants the local IEEE OU a license to operate IEEE SoutheastCon on behalf of Region 3. As compensation for this and a 50% financial co-sponsorship the OU will receive 50% of any surplus that is generated. Region 3 assumes 100% of the liability should the conference operate at a loss. To protect the Region's interest in the conference Region 3 Director or his delegate shall have ultimate authority over all aspects of the conference and can overrule any decision made by the local OU. The license granted to the local OU can be revoked only by a vote of Region 3 Committee.

An MOU will be generated during the conference application process. Upon approval of the host site by Region 3 Committee, Region 3 will submit the conference application. The MOU that is generated must indicate the conditions listed above. The Region 3and local OU must approve the conference application prior to starting any contract negotiations with the local venues. The application can be submitted via the Conference Organizers Portal https://www.ieee.org/conferences_events/conferences/organizers/index.html.

## 5.2. Execute Venue Contract

Region 3 Conference Committee will negotiate and execute the contracts with the Conference venue(s). The Region 3 Conference Committee will ensure that the property meets all the requirements of the Conference. Region 3 Conference Committee will make sure the contract contains provisions to cover the resources normally required for the Conference including, but not limited to:

- Power
- Internet
- Rooms
- Food & Beverage
- Function Space
- As the venue contract will have a liability of more than US$25,000 it will be necessary to submit the contract to IEEE Corporate for review and approval at conference-contracts@ieee.org.

### 5.2.1. Contract Lessons Learned

When reviewing the contract, we have found that the following clauses should be included:

- A Rate Protection Clause should be included. A rate protection clause protects the conference from having the venue sell rooms at a lower rate than the negotiated rate. Not all properties will agree to this, but this should be a part of the negotiation with the property.
- A clause should be in the contract in regards to the fees and usage of power and internet. Access to house power in the function spaces should be complimentary (may be dependent on meeting room or Food and Beverage commitments). Power in addition to normal house power should be at an additional charge. Internet should be negotiated at a fixed rate for the conference (avoid per user fees). This fixed rate may be per-day with a usage limit. If there is a usage limit, then negotiate a limit appropriate for the number of attendees to the conference.
- It is preferred that the property allow for outside vendors for A/V without additional charge. However, at certain properties the A/V must be purchased in house.
- Unless the conference venue is significantly larger (2x or more) than the minimum requirements specified in Section 3.1 above, then your contract should allocate 100% of the space 24 hours a day for the duration of the conference. The contract should state that any unneeded space will be released to the hotel/conference center anywhere between 1 to 3 months (pick a specific time period) prior to the conference.
- A clause should be added to make sure that no event should be scheduled in any space adjoining the Awards Banquet room.
- It is preferred that the property(ies) provide high-speed wireless access at all venue locations at no charge. This is an item that can be negotiated upfront and the organizing committee would need to verify access speeds for large number of conference attendees.
- If you have hosted a conference and would like to provide additional lessons learned, please contact Conference Committee for inclusion in this document

## 5.3. Establishing your Steering Committee

A core steering committee should be established shortly after Region 3 approval. The steering committee should be kept rather small to facilitate progress. This steering committee can be established using any combination of Region 3 and Local resources. The steering committee should include the following members:

- General Chair
- Vice Chair (or Co-Chair)
- Treasurer
- Secretary
- Technical Program Chair
- Student Program Chair
- Exhibits/Contributors Chair
- Publicity/Social Media Chair
- Logistics Chair
- Web Master
- Spouse/Partner Program Chair (optional, but recommended)
- Ex Officio from Region 3 Conference Committee

Each chair may, but is not required to, establish a subcommittee to implement their plans. A steering committee member may chair more than one subcommittee, but it is best to avoid spreading a volunteer too thin. The members of a subcommittee may attend the steering committee meetings, but should not

be considered voting members of the steering committee. It is recommended that you contact previous year(s) committee members for guidance and experience.  Select portion of the committee will need to attend at least prior year's conference to gain knowledge on hosting the conference.

### 5.3.1.  General Chair

The General Chair is responsible for the overall execution of the conference.  The General Chair provides mentorship to committee members and resolves any conflicts that may arise during the execution of the conference.  A General Chair delegates tasks and action items to other members of the committee and makes sure the conference remains on schedule.   The General Chair is responsible for reporting conference status to the Region.  The General Chair establishes the conference budget with the Treasurer.  The General Chair establishes the Agenda for committee meetings with the Secretary.  The General Chair runs the committee meetings and makes sure they stay on agenda.

### 5.3.2.  Vice Chair/Co-Chair

The Vice Chair is usually given the responsibility of managing a major portion of the conference at the discretion of the General Chair.  This could be the program, registration, or some other task the Vice Chair is able to manage.  The Vice Chair will become the General Chair if the General Chair is not able to perform their duty.

### 5.3.3.  Treasurer

The Treasurer maintains the finances of the conference.  The Treasurer is responsible for establishing and maintaining the budget.  The treasurer will pay all bills of the conference and ensure submittal of all appropriate documents to IEEE according to IEEE deadlines.  The Treasurer shall not also serve as the General Chair or Vice Chair/Co-Chair.

### 5.3.4.  Secretary

The Secretary takes the minutes of the committee meetings.  The Secretary maintains the action item list for the committee.  The Secretary announces the committee meetings and publishes the Agenda as established by the General Chair for the meeting.  The Secretary is responsible for making sure all committee documents are archived on Region 3 SoutheastCon Google Drive.

### 5.3.5.  Technical Program Subcommittee

The technical program subcommittee is responsible for all aspects of the technical program.  This committee will issue the call for papers, accept paper submissions, review paper submissions, select the papers for presentation at the conference, and develop the proceedings of the conference.

### 5.3.6.  Student Program Subcommittee

The student program subcommittee is responsible for all aspects of the student program.  This committee will act as a liaison with the host student branch(es).  This committee is responsible for making sure all the student competitions are properly managed.  This committee must work closely with the Regional Student Representative (RSR) and the Regional Student Activities Chair (RSAC).

### 5.3.7.  Exhibits/Contributors Subcommittee

The exhibits/contributors subcommittee is responsible for targeting, identifying, and contacting potential local contributors and exhibitors.  This committee should work with Region 3 Conference Committee to get a copy of the exhibitor/contributor prospectus as well as help in identifying regional and national exhibitors/contributors for the conference.  This will include the development of an

advertising strategy and marketing plan, see Section 5.8.  This committee will work with the Publicity Subcommittee to acknowledge contributors and sell advertisements in the program.

### 5.3.8.  Publicity/Social Media Subcommittee

The publicity/social media subcommittee is responsible for work with Region 3 Conference Committee to publicize the conference.  This committee will be responsible for placing advertisements in appropriate media (print, web, etc.) as specified in the marketing plan.  This committee is also responsible for producing conference publications other than the proceedings, including the conference program.

### 5.3.9.  Web Master

The web master will be responsible for developing and maintaining the conferences website in accordance with IEEE guidelines and provide up to date information with respect to conferences activities to communicate with the authors, students, and Region 3 participants.

### 5.3.10. Logistics Subcommittee

The logistic subcommittee is responsible for supporting the conference chair with all aspects of the conference logistics.  These activities will include facility planning, meal planning, volunteer coordination, as a minimum.

### 5.3.11. Spouse/Partner Program Subcommittee

The spouse/partner program subcommittee is responsible for developing programs and supplying information for the spouse/partner and children of the attendees.  This subcommittee will identify local attractions and events of interest to the attendees and their partners.  This subcommittee may be chaired by a spouse/partner of a member.

## 5.4.  Hosting a Virtual Technical Meeting

As observed with SoutheastCon 2020, global pandemic and other events may pose challenges to hosting a SoutheastCon.  This disruption in hosting the Region 3 meetings and student competitions, actually enabled exploring and hosting a successful virtual technical conference where authors were able to present their papers and continue to provide a venue for authors to get the opportunity to successfully publish their technical area of research.  Virtual technical meetings can be hosted using IEEE supported conferencing tools such as WebEx Events which allow conduct of webinars with up to 3000 attendees and streaming capability for up to 40,000 attendees.  IEEE MCE has expertise in online, virtual, and digital event mediums and can also assist with hosting such events.  Additional information can be found at IEEE Virtual Events.

## 5.5.  Establish Concentration Banking Account (CBA)

The conference MUST use an IEEE concentration banking account.  Region 3 Treasurer will establish the CBA for the Conference.  The following people must be on the signature card for the concentration banking account:

- General Chair
- Conference Treasurer
- Region 3 Treasurer

All funds related to the conference must be deposited into and distributed from the CBA.  It is not allowed for any expenses to be paid directly by conference volunteers unless they submit a request for

reimbursement from the conference from the CBA.

Under no circumstances should funds received by the conference be deposited into a personal account or an account of a different IEEE organizational unit.

## 5.6. Reporting to Region 3

The conference must report status to Region 3 at the normally scheduled Region 3 ExCom and Committee meetings.  These reports should include the following information:

- General Status Overview
- Paper Submission Status (Submitted/Reviewed/Accepted)
- Registration Status (number of registrants by category)
- Room Pick-up status (number of room-nights sold)
- Financial Report (budget status update)
- Roadblocks

# 6.    Planning Your Conference

## 6.1. Budget

A well thought-out and maintained budget is important to the success of the conference.  The conference treasurer is responsible for maintaining the budget and monitoring the expenses against the budget. NetSuite will be used to track conference finances.  See https://www.ieee.org/conferences_events/conferences/organizers/conference_financial_transaction_n etsuite.html.

It is required that the preliminary budget show a 20% surplus on the conference.  Even though IEEE is a not-for-profit corporation, the surplus generated from the conference helps the Section and Region 3 support the other programs and volunteer activities that they run.

There are some rules that should be kept in mind when establishing a budget:

- The rate for non-members should be at least 15% more than members (and must be more than the cost of membership)
- The rate for students should be kept to a reasonable minimum.  This amount should be subsidized by contributions and exhibits.
- The rate for life members must be no more than the rate that students pay.

When establishing the budget, it is important to remember that the prices charged by hotels for food, beverages, and services are not based in reality.  Get a price list from the hotel as early as possible and generate an estimated food, beverage, and services cost to help determine the rates to charge attendees for your conference. Make sure tax and service charges are included in your estimate.  It is important to closely review the contract for any item that could have a budgetary impact.  The attendee fees should cover at a minimum the cost of these items.  A spreadsheet is available from Region 3 to help determine this information.

NOTE:  It is absolutely critical to keep up with the conference budget and make sure that regular budget updates are provided to IEEE.  If for any unforeseen reason the conference is cancelled or impacted, amount of liability covered by IEEE conference insurance will be based on the last approved and submitted budget.  Please see Section 6.8.

## 6.2.  Program Plan

On the IEEE Conference required documentation page there is a checklist and timeline for planning and running a conference. http://www.ieee.org/conferences_events/conferences/organizers/required_documentation.html.  The presentation can be used to establish a program plan for the conference.  The program plan does not need to be any specific format.  Past conferences have used excel spreadsheets and action item lists.  Use whatever format that your committee is comfortable with using.

## 6.3.  Call for Papers

The call for papers should be completed and ready in time to be placed in the prior year's conference program.

## 6.4.  Paper Submission and Review

Region 3 Conference Committee will select and contract for the Paper Submission and Review system.  Currently the system is supplied by X-CD (http://www.x-cd.com/).  Region 3 Conference Committee will periodically review the list of available paper submission systems.  The following requirements must be met:

- Integrated with Conference Registration System
- Able to handle at least 1,000 papers
- Able to handle blind and non-blind reviews

## 6.5.  Online Registration

Region 3 Conference Committee will select and contract for the Online Registration system.  Currently the system is supplied by X-CD (http://www.x-cd.com/).  Region 3 Conference Committee will periodically review the list of available registration systems.  The following requirements must be met:

- Early and late Group Registration Capability
- Early and late Student registration with different registration fees
- Early and late Volunteer registration
- Author registration
- Contributor/Exhibitor Registration
- Onsite Badging
- Onsite Check-in
- PCI Compliant
- Integrate with a CBA capable payment system

## 6.6.  Risk Assessment and Management Plan

A Risk Assessment and Management Plan should be performed for the conference.  The discussion on how to execute a Risk Assessment and Management Plan is outside the scope of this document.  Several papers and seminars are available online.  If a conference needs help on establishing a Risk Plan, please contact Region 3 Conference Committee.  A sample Risk Analysis spreadsheet can be found in the Templates directory of the SoutheastCon Google Drive.

## 6.7.  Emergency Management Plan

Although we hope that emergencies will not happen at SoutheastCon, the conference organizers and volunteers should be prepared to handle such an event if it should occur.  Past SoutheastCons have experienced tornadoes, fires, and various medical emergencies.  It is imperative that you discuss your

emergency management plan with the property and tailor your rules to the venue.  Most venues have on-site first responders that can respond to an emergency quickly.

The Emergency Management Plan should be communicated to all SoutheastCon volunteers.  The types of emergencies that should be covered include, but are not limited to:

- Weather Emergencies (Tornado, Hurricane, Flooding)
- Fire
- Medical Emergencies (Minor & Major)
- Active Shooter
- Bomb/Terrorist Threat

When an emergency situation occurs, you may have only moments to respond, and the actions taken can have a significant impact on the event. Having a solid plan in place is the first step.

A well thought out and detailed plan is an essential part of emergency preparation. IEEE's Event Emergency Response Team (EERT), is pleased to provide this template for your use and provides a framework for developing an emergency response plan for your event.  Download the template and get your action planning started!

## 6.8.  Conference Insurance

Hosting a conference can be rewarding, but if for some reason the conference has to get cancelled, it could also be a huge liability to the organizing committee and Region 3.  As a result, any approved IEEE conference is covered by the following insurances:

### 6.8.1.  Liability Insurance

IEEE maintains Commercial General Liability (CGL) insurance to protect IEEE in the event a claim is made against IEEE and/or its Volunteers. The CGL insurance provides coverage for third-party bodily injury and property damage.

IEEE Volunteers are included on IEEE's insurance policies and protected while acting within the scope of their duly authorized duties as Conference Officers or Committee Members for the duration of the conference and its activities.

To the extent permitted by law, IEEE shall indemnify each person who serves as a duly authorized Volunteer of a duly authorized IEEE activity pursuant to IEEE Bylaw I-300.3 Indemnification .

The Conference must maintain a record of all Officers and Committee Members who are actively engaged in the management of the conference. This record ensures that coverage is afforded to the appropriate Volunteers acting on behalf of the conference.

In addition to the primary CGL insurance coverage, IEEE maintains Umbrella Liability coverage that provides additional limits of liability coverage.

Conferences utilizing a transportation service provider (e.g. Boat cruise, Bus tour, other) should obtain evidence of insurance coverage from the service provider. IEEE should be named as an additional insured. IEEE's liability insurance coverage does not apply to charters. For additional information, please contact ORIMS@ieee.org.

### 6.8.2. Property on Exhibition Insurance

Contact ORIMS@ieee.org if you require insurance for any IEEE-owned, leased, rented, or borrowed equipment. Please include the following equipment information with your request:

- Description
- Owner
- Replacement value (US$)
- Copy of rental/lease agreement with insurance requirements (if applicable)
- How will the equipment be safeguarded while on exhibition at the conference?
- Dates coverage required

### 6.8.3. Business Crime Insurance (also referred to as fidelity bonding)

IEEE maintains business crime insurance that protects IEEE in the event of loss due to fraudulent acts (e.g., theft of conference funds) committed by staff or volunteers.

The IEEE business crime insurance does not provide coverage for theft of IEEE funds by third-party registration service providers.

### 6.8.4. Event Cancellation Insurance

Effective October 2013, all approved IEEE conferences that are 100% financially sponsored by IEEE are automatically covered by an event cancellation insurance policy. In order for a conference to qualify for coverage under the IEEE Event Cancellation Insurance Policy, the following conditions MUST be met:

1. The conference must be 100% financially sponsored by one or more IEEE Society and/or organizational unit,
2. The conference must be approved by IEEE and included in the IEEE Conference Database, and
3. A detailed conference budget MUST be submitted and included in the IEEE Conference Database.

The Event Cancellation Insurance protects the conferences from lost revenue and/or additional expenses incurred as a result of an unforeseen cancellation, postponement, or curtailment of an event. Examples of such disruptions might include natural disasters (hurricanes, tornadoes, blizzards, etc.), fire or flood damage to a venue, airline or hotel staff strikes, and other unforeseen causes of event cancellation.

Event Emergency Response Team (EERT) is IEEE's centralized event emergency preparedness hub, offering strategies, best practices, and resources for all IEEE global events. EERT can assist organizers in minimizing the impact of emergencies on event performance, safety and well-being attendees, and organizational reputation.  More information on EERT can be found at https://www.ieee.org/conferences/organizers/emergency.html.

All other conferences (not wholly owned by IEEE) continue to have the option to purchase individual Event Cancellation Insurance policies. To take advantage of the program IEEE has negotiated, please submit a completed Event Cancellation Insurance application and a copy of the conference budget to ORIMS@ieee.org.

### 6.8.5. Conference venue Certificates of Insurance

Certificates of insurance that are required by the conference venue are available upon request. They must be prepared by IEEE's insurance broker and should be requested 30-60 days in advance of the

conference. Please allow 5-7 business days for processing.

To obtain a current certificate of insurance, submit a [completed certificate request form](#) to [ORIMS@ieee.org](mailto:ORIMS@ieee.org). Please include a copy of the venue's insurance requirements and a copy of the executed agreement between the IEEE and the venue.

## 6.9.  Sales & Marketing Plan

A Sales & Marketing Plan should be established in coordination with Region 3 Conference Committee as soon as possible after the conference is awarded.  The success of every conference depends on the level of attendance, which is directly related to the marketing activities involved.  There are a wide variety of marketing channels to consider for getting the word out about your conference.  Always think about your target market and how to communicate as a basis for determining the right mix of communication channels.  Adding basic marketing techniques to a traditional approach to organizing an event can have big impact both in building your community and in positive financial results.  Creation of blended marketing and communications plan comprised of website development, social media, and direct and indirect outreach and advertising to your local, regional, and international network of support can promote development and engagement of your target audience.

With any conference, development of a consistent theme that promotes your goals of the conference is key.  In most cases, the theme can be based on strength of the hosting Section's or Council's technological/industrial/economic business drivers that are the forcing function of economic development where the conference will be hosted.  The theme will be a key driver for developing your conferences brand and promoting it through media.

Having a plan with clear goals and reporting on outcomes will help track success in reaching audiences to increase registration, participation & brand awareness.  You can utilize some of the resources available through IEEE MCE to customize an Audience Development Plan to fit the goals of your conference using a blend of marketing and communications strategies including but not limited to:

- Email Marketing
- Social Media
- Online Targeted Advertising
- Custom landing pages for speakers, attendees, and exhibitors
- Research & outreach
- Lead generation
- Connection & leverage to IEEE resources

Your Sales and Marketing plan should not only include ways to increase author and member participation, but also establish a means by which you can attract corporate contributors.  Your local Convention and Visitors Bureau and Chamber of Commerce should be a good resource for assisting you to promote your conference to chamber members.

# 7.    The Student Program

The student program is one of the key components of the SoutheastCon as it brings together universities within Region 3 to compete against each other.  These competitions are developed and managed by both the local hosting Section and Region 3 Student Activities Committee (SAC).  The hosting Section/Student

branch is responsible for:

- Robotics hardware competition
- Software competition
- Hackathon (optional)
- Any other locally developed competition

The robotics hardware competition will need to publish its hardware competition rules during the last day of the previous year's conference. Hardware competition rules will need to be provided to the Conference Committee for review and comments/feedback 30-days prior to release of the rules.

SAC will be responsible for developing and organizing the following minimum competitions:

- Ethics
- Presentation
- Networking
- T-Shirt
- Web site

The conference student program subcommittee will work with SAC and logistic subcommittee in organization and conduct of these competitions. The hosting Section/Student Branch will be responsible for identifying and providing the judges and volunteers for all of the competitions.

# 8. The Technical Program

The technical program is another key component of the SoutheastCon, and in actuality the primary component for any surplus that the conference will realize. Much like the hardware robotics competition, the technical program activities start with the release of the conference Call for Papers during previous year's conference. The technical program subcommittee is responsible for developing the call for papers, assembling technical paper reviewers, and developing tutorials.

# 9. The Region 3 Program

Region 3 Program is typically held on Friday, Saturday, and Sunday morning. Region 3 volunteers participate, and approximately 85 people attend. Region 3 pays for the members of the Executive Committee and each Section Chair (or a representative) to attend. Some Sections send multiple volunteers to the meeting, but their cost is covered by their Section.

Region 3 program is set by Region 3 Director, with support from the Executive Committee members. The program typically includes Leadership training, IEEE-USA President-Elect Candidates' Presentations, IEEE President-Elect Candidates' Presentations, Area meetings, MOVE truck tours and training, Red Cross training, and an Awards Banquet on Saturday night. Typically, a Young Professional networking event is organized by the YP Coordinator, and a WIE networking or lunch is organized by the WIE Coordinator.

Area chair meetings are typically held on Friday night, and a separate room is needed for each chair meeting.

Depending on the program, Region 3 may need multiple rooms for concurrent sessions on Friday and/or Saturday. Work closely with Region 3 Director to understand their space and A/V needs, and to keep them informed of the availability of space at the venue. Region 3 Committee business meeting is held on Sunday morning, ending at noon. This meeting takes place in one room, large enough to hold all region attendees.

Saturday morning often starts with an Eta Kappa Nu (HKN) Induction ceremony. On Sunday morning a Region 3 Committee is held, and the program ends at noon.

A sample conference schedule is available on the Conference Google Drive.

# 10. Running the Conference

## 10.1. Semantics
When dealing with a hotel venue, it is important to understand the terminology and semantics used.

- Banquet Event Order (BEO) – This is a document that gives the direction to the hotel and A/V vendors describing when and how the function space should be laid out.
- Turn – This is a term used to indicate that a function space layout must change between events. Depending on the size of the change to the function space, the turn will require a certain amount of time. When a room must be turned, it is important to work with the hotel to determine the amount of time to complete the turn and schedule accordingly.
- Conference Services Manager (CSM) – This is the person at the hotel that will actually be responsible for executing your conference for the hotel. This will be primary point of contact at the hotel during the conference. The venue may also assign a dedicated Banquet Manager that will be responsible for meal functions.

## 10.2. Food & Beverage (F&B)
The conference normally provides meals at the conference. The conference normally provides full-paid attendees all meals. The following meals are normally provided:

- Thursday Breakfast (if needed for tutorials)
- AM Break (if needed for tutorials)
- Thursday Lunch (if needed for tutorials and volunteers)
- PM Break (if needed for tutorials)
- Friday Breakfast (full-paid attendees & volunteers)
- AM Break (all attendees)
- Friday Lunch (full-paid attendees & volunteers)
- PM Break (all attendees)
- Friday Reception (all attendees)
- Saturday Breakfast (full-paid attendees & volunteers)
- AM Break (all attendees)
- Saturday Lunch (full-paid attendees & volunteers)
- PM Break (all attendees)
- Saturday Banquet (all attendees)
- Sunday Breakfast (full-paid attendees & volunteers)
- AM Break (all attendees)
- Sunday Lunch (Conference Debrief)

It is recommended to host hot breakfast buffets.  Depending on type of property under contract, breakfast may already be included.  For lunch, it is usual to have either a deli buffet, box lunch, or soup/sandwich buffet.  The Friday Reception is a heavy hors d'oeuvres buffet.  The Saturday Banquet is a plated meal.  Be mindful of special dietary needs and try to work with the facilities to accommodate special needs.  It is recommended that the hosting conference committee coordinate the meal guarantees for each meal function with Region 3 Conference Committee for guidance based on prior knowledge and experience.

As students and life members are heavily subsidized, the conference cannot afford to give them all meals.  Unless the conference receives contributions to offset the added costs for these members, it is recommended that you work out a cash lunch option for the students.  In the past, the conference has provided a hot line with burgers, hot dogs, and other items at a reasonable cost.

## 10.3.   Banquet
The conference banquet occurs on Saturday evening at SoutheastCon which includes formal sit-down dinner.  As part of the banquet, Region 3 Awards are made to awardees selected by Region 3 Awards Committee.  Hosting committee needs to coordinate banquet schedule with Region 3's Awards Committee Chair for agenda and publication of the banquet agenda.  Additionally, during the banquet, SAC will present its awards for all the student competitions held at the conference.  Since SoutheastCon 2008, final round of the student Hardware competition has also been held during the banquet ceremonies.  Prior to the conclusion of the banquet, the hosting Committee for the subsequent SouthestCon will introduce the upcoming city and conference to the participants.  Time and space needs to be allocated on the schedule to accommodate these activities.

## 10.4.   Function Space
The conference normally requires exhibit space for the student program competitions, meeting rooms for region meetings, technical presentations, and tutorials, and banquet/reception hall(s).   The following are minimum function space requirements:

- Total Conference Space:  25,000 ft$^2$ (2,325 m$^2$)
- Largest Ballroom Size:  10,000 ft$^2$ (930 m$^2$)
- Secondary Ballroom Size:  7,500 ft$^2$ (700 m$^2$)
- Peak Breakout Rooms (w/Ballrooms all divided):  20
- Accommodations for MOVE truck access adjacent to venue for parking and training
NOTE:  The hardware competition space needs 7,000 – 10,000 ft$^2$ of dedicated space starting Noon Thursday for setup and open 8:00 Friday – 16:00 Saturday.  MOVE Truck is 32' long x 10' wide x 13'4" high.

## 10.5.   Registration
Region 3 Conference Committee will supply the logistics for operating the onsite registration.  Region 3 Conference Committee will supply the following:

- Training for the Registration Team
- Badge Printers
- Badge Stock
- Ticket Stock
- Generic Printers

## 10.6.    Attendee Survey and Evaluation

It is always in the interest of the conference committee and the region to have information with respect to the conference and how it was conducted.  One component of the conference that is not tracked appropriately, is the number of participants that obtained lodging at other places than the conference primary hotel.  It is recommended that a survey be made available during the registration to collect information on attendees lodging location.  Additionally, the conference committee is interested in obtaining feedback from the participants on the conduct of the conference such that, year-over-year, we can improve how the conference is hosted.  It is recommended that a survey be sent out to all participants within a week after the conference.  Some conference Apps allow the participants to provide feedback on the conference, including each session.

A sample survey is in the Conference Committee Google Drive.

## 10.7.    Post-Conference Debrief

On the last day of the conference, the organizing committee needs to schedule a 2-hour debrief session that includes representation from  the organizing committee, Region 3 Conference Committee, Region 3 Executive Committee, and representatives from the next years' committee to review and brief out on the status of the hosted conference.  During this de-brief, the hosting committee should provide high level information on registrants, number of papers presented, and anticipated gross conference proceeds.  This debrief is also intended to provide feedback and lessons learned to the representative of the next years' committee on what was successful and pitfalls to avoid.

A sample agenda is in the Conference Committee Google Drive.

## 10.8.    Celebrate!

Once the conference is over and the conference committee has had a chance to de-compress, schedule a celebration event for all volunteers that assisted with organizing and executing the conference.  All who participated and supported with conduct of the conference, including their spouses or significant others, need to celebrate the accomplishment of holding a successful conference by just networking and being recognized for their efforts.  It is recommended that conference Chair(s) recognize key contributors during this event.

# 11.   Closing the Conference

Remember that the conference is not done until all accepted papers have been submitted to IEEE Xplore and all financial transactions have been completed, vendors paid, and funds distributed accordingly.  Please refer to Attachment 2 for a checklist that will assist you with the closeout activities.

## 11.1.    Technical Papers

Within 30-days of the close of the conference, the technical committee needs to ensure that all submitted papers meet conference and IEEE Xplore guidelines as established at the onset of paper acceptance.  The conference copyright and ISBN must appear on the first page of each paper.  Additionally, the technical committee needs to review and make sure that all accepted authors were present, or had a proxy to present their paper at the conference.  Once the attendance, presentation, and listing of presentations at the conference are verified, the technical committee will need to make sure that all papers have the appropriate assigned Electronic Copyright Form (eCF) from IEEE and that there

are no duplications.  eCFs should have been obtained during the papers submission process, but the technical committee needs to verify prior to request for submission and upload of the completed papers by the paper submission system (X-CD).

## 11.2.    Financial Reporting

All IEEE sponsored and co-sponsored conferences are responsible for closing the conference financials within twelve months after the end of the conference.  However, SoutheastCon recommends closing out the conference financials within **6-months**.  The closeout includes the following activities:

- In NetSuite, enter all income and expenses
- Repay any advances and loans to the region and local hosting Section/Council
- Complete payment of all outstanding invoices
- Resolve any potential invoice disputes
- Submit schedule of tax payments (if applicable).  This will include submission of 1099 forms.  If your conference made payments to US citizens, or resident aliens, that would be classified as income. Do not include expense reimbursements.
- Review allocation of income and expenses according to correct conference Chart of Accounts (See Attachment 1)
- Complete the final financial report.
- Submit Certificate of Accuracy.
- Complete the audit, if required
- Distribute surplus funds and assets.
- Request closeout of conference concentration account and distribution of funds based on agreed upon MOU between Section/Council, Region, and any other entity.

IEEE officially closes the conference once all of the required information has been submitted.

## 11.3.    Final Conference Report

At a minimum, the conference final report will need to be provided to IEEE MCE and the IEEE Region 3 Director as part of closeout.  This will include a breakdown of conference revenue, conference expenditures, number of registrant by category, and other income such as contributions.  This final report will need to be submitted with the financial closeout information.

## 11.4.    Audit

Conference audits provide IEEE with an independent evaluation of conference finances. The audit ensures that conference income and expenses are monitored, and that the financial reports issued at the end of the conference are fair.  Updated IEEE Conference Audit information can be found at https://www.ieee.org/conferences/organizers/finance-audits.html.

It is recommended that all conference audits be performed by IEEE Auditors.  This will include completing the Conference Audit Material Checklist (PDF, 59 KB) and submitting all required audit materials to IEEE Conference Business Operations.  Be aware that conference audit will

When planning your conference budget, be sure to include an estimate for audit fees. The estimated fees for an audit by IEEE are:

| Total Budgeted Revenue or Expense Fee (Before Loans) | Audit Fee | Audit Scope |
|---|---|---|
| **US $0–$99,999** | None | A representative sampling of 10% of the conference financial |

| | | data |
|---|---|---|
| **US $100,000 & up** | 0.6% of budgeted revenue or expense, up to US$6,000 | 100% of the conference financial data |

## 11.5. Closing of Accounts

Close the conference bank accounts after all invoices are paid and any surplus distributed. IEEE requires proof that the bank account is closed. The proof you submit depends on the conference bank account type.

| Type of Bank Account | Proof that Bank Account is Closed |
|---|---|
| **Concentration Banking** | Submit a completed copy of the Concentration Banking Destroy Unused Checks form (PDF, 23 KB). |
| **Third-Party Manager** | Email Conference Finance Services at conference-finance@ieee.org to determine appropriate proof of closure. |

# 12. Normative Schedule

## 12.1. Conference Planning Schedule

Hosting of a conference also requires pre-planning and establishing necessary timelines. Conference planning should include a schedule of activities that assists conference organizers to host a successful conference. IEEE recommends the following planning schedule (https://www.ieee.org/content/dam/ieee-org/ieee/web/org/conferences/high_level_conference_timeline.pdf):

## 12.2.  SoutheastCon Planning Schedule

This section gives you a high-level schedule of events related to SoutheastCon.

**4 Years Prior to Conference**

**First Half**

- OUs inform Region 3 of interest in hosting

**Fourth Quarter**

- Region 3 selects at least 3 locations to host
- Region 3 submits Requests for Proposals (RFP) to venues capable of hosting the conference

**3 Years Prior to Conference**

**First Quarter**

- Region 3 Conference Committee reviews proposals received from venues
- Region 3 Conference Committee selects proposal to be presented as motion at Region 3 Committee meeting at SoutheastCon
- Region 3 Committee reviews and selects proposal for host site
- Start Hardware competition rule development

**Second Quarter**

- Region 3 informs host site and OU of selection

# Region 3 IEEE SoutheastCon Operations Manual

- Region 3 submits conference application to IEEE
- Region 3 starts venue contract negotiations
- Conference application approved by Region 3 and OU
- Region 3 submits negotiated contracts to IEEE corporate

### Third Quarter

- Venue contracts approved by IEEE
- Venue contracts signed


## 2 Years Prior to Conference

### First Quarter

- Obtain insurance coverage
- Develop conference theme and conference marketing plan
- Develop contributor categories and engagement plan
- Work with local Conventions and Visitor's Bureau for promotion of conference and participation in prior year's SoutheastCon
- Obtain conference concentration account
- Apply and receive Seed money from Region 3 and host Section/Council

### Second Quarter

- Prepare a budget
- Review TAG listing
- Submit budget for SoutheastCon
- Start development of conference website
- Start development of technical Call for Papers

### Third Quarter

- Begin planning for Exhibits
- Plan and send a crew to prior year SoutheastCon

### Fourth Quarter

- Send Hardware Competition rules to Region 3 Conference Committee for review and approval
- Complete Hardware Competition rules for presentation at prior year's SoutheastCon
- Complete Call for Papers
- Update and prepare conference website for release
- Plan and send a crew to prior year SoutheastCon

## 1 Year Prior to Conference

### First Quarter

- Attend SoutheastCon
- Release conference website
- Release Call for Papers
- Obtain technical paper reviewers

### Second Quarter

- Send final Call for Papers
- Update and announce final Hardware Competition rules

### Third Quarter

- Send out  Paper Acceptance/Regrets/Author Kits
- Review and resubmit updated budget to IEEE HQ
- Initiate conference layout planning
- Work with Region 3 Director and Region 3 Awards Committee on schedule of activities for Region 3 meetings
- Work with conference hotels for room pick-up lists

### Fourth Quarter

- Review registrations and deadlines for early registrations
- Develop conference program
- Develop technical Paper Presentation schedule
- Review conference risks and emergency management
- Update and submit budget to IEEE HQ

# Region 3 IEEE SoutheastCon Operations Manual

**ATTACHMENT 1 – Conference Chart of Account**

| Account # | Account Description | Internal ID | Type |
|---|---|---|---|
| 30000 | Conference Registration Fees | 3983 | Income |
| 30100 | Conference Registration Fees : IEEE Member Registration | 3984 | Income |
| 30110 | Conference Registration Fees : IEEE Member Registration : Advance IEEE Member Reg. | 3991 | Income |
| 30150 | Conference Registration Fees : IEEE Member Registration : At Conference IEEE Member Reg. | 3992 | Income |
| 30200 | Conference Registration Fees : Nonmember Registration | 3985 | Income |
| 30210 | Conference Registration Fees : Nonmember Registration : Advance Nonmember Reg. | 3993 | Income |
| 30250 | Conference Registration Fees : Nonmember Registration : At Conference Nonmember Reg. | 3994 | Income |
| 30300 | Conference Registration Fees : Other Discounted Registration | 3986 | Income |
| 30310 | Conference Registration Fees : Other Discounted Registration : Advance Other Discounted Reg. | 3995 | Income |
| 30350 | Conference Registration Fees : Other Discounted Registration : At Conference Other Discounted Reg. | 3996 | Income |
| 30500 | Conference Registration Fees : Student Member Registration | 3987 | Income |
| 30510 | Conference Registration Fees : Student Member Registration : Advance Student Member Reg. | 3997 | Income |
| 30550 | Conference Registration Fees : Student Member Registration : At Conference Student Member Reg. | 3998 | Income |
| 30600 | Conference Registration Fees : Student Nonmember Registration | 3988 | Income |
| 30610 | Conference Registration Fees : Student Nonmember Registration : Advance Student Nonmember Reg. | 3999 | Income |
| 30650 | Conference Registration Fees : Student Nonmember Registration : At Conference Student Nonmember Reg. | 4000 | Income |
| 30700 | Conference Registration Fees : Society Member Registration | 3989 | Income |
| 30710 | Conference Registration Fees : Society Member Registration : Advance Society Member Reg. | 4001 | Income |
| 30750 | Conference Registration Fees : Society Member Registration : At Conference Society Member Reg. | 4002 | Income |
| 30799 | Conference Registration Fees : Society Member Registration : SSCS Member Credit | 5412 | Income |
| 30800 | Conference Registration Fees : Life Member Registration | 3990 | Income |
| 30810 | Conference Registration Fees : Life Member Registration : Advance Life Member Reg. | 4003 | Income |
| 30850 | Conference Registration Fees : Life Member Registration : At Conference Life Member Reg. | 4004 | Income |
| 30900 | Conference Registration Fees : Registration Revenue - In-Kind | 6295 | Income |
| 30999 | Conference Registration Fees : Registrations - Other | 6226 | Income |
| 31000 | Miniconferences/Symposiums | 4005 | Income |
| 31100 | Miniconferences/Symposiums : Miniconferences/Symposiums | 4006 | Income |

| 32000 | Tutorial Fees | 4007 | Income |
|---|---|---|---|
| 32100 | Tutorial Fees : Tutorial Fees | 4008 | Income |
| 33000 | Conf Publication Sales | 4009 | Income |
| 33010 | Conf Publication Sales : Paper, Members | 4010 | Income |
| 33020 | Conf Publication Sales : Paper, Non Members | 4011 | Income |
| 33030 | Conf Publication Sales : Other Media Types | 5413 | Income |
| 33040 | Conf Publication Sales : Conf Publication Sales - In-Kind | 6297 | Income |
| 34000 | Exhibits | 4012 | Income |
| 34100 | Exhibits : Exhibits | 4013 | Income |
| 34110 | Exhibits : Exhibit Booth Revenue, In-Kind | 5970 | Income |
| 35000 | Corporate Support | 4014 | Income |
| 35010 | Corporate Support : Patron Support | 4015 | Income |
| 35011 | Corporate Support : Patron Support : Patron Support - In-Kind | 6294 | Income |
| 35020 | Corporate Support : Advertising | 4016 | Income |
| 36000 | Corporate Support : Grants, Donation | 4017 | Income |
| 37000 | Social Event | 4018 | Income |
| 37010 | Social Event : Banquet | 4019 | Income |
| 37030 | Social Event : Other Events | 4020 | Income |
| 38000 | Value Added Tax Reclaimed | 4021 | Income |
| 38100 | Value Added Tax Reclaimed : Value Added Tax Reclaimed | 4022 | Income |
| 39000 | Miscellaneous Revenue | 4023 | Income |
| 39100 | Miscellaneous Revenue : Bank Interest | 4024 | Income |
| 39200 | Miscellaneous Revenue : Miscellaneous Revenue | 4025 | Income |
| 40000 | Management Services | 4026 | Expense |
| 40010 | Management Services : IEEE MCM | 4027 | Expense |
| 40020 | Management Services : External Management Services | 4028 | Expense |
| 40500 | Registration Expense | 4029 | Expense |
| 40510 | Registration Expense : Registration Expense | 4030 | Expense |
| 41000 | Promotion | 4031 | Expense |
| 41010 | Promotion : Announcement | 4032 | Expense |
| 41020 | Promotion : First Call For Papers | 4033 | Expense |
| 41030 | Promotion : Call For Papers | 4034 | Expense |
| 41040 | Promotion : Advance Program | 4035 | Expense |
| 41050 | Promotion : Final Program | 4036 | Expense |
| 41060 | Promotion : Advertisements | 4037 | Expense |
| 41061 | Promotion : Advertisements : Publication Advertising, In-Kind | 5971 | Expense |
| 41070 | Promotion : Promotional Items | 5414 | Expense |
| 41080 | Promotion : Giveaways | 6770 | Expense |
| 41090 | Promotion : Attendee Gifts | 6771 | Expense |
| 41499 | Promotion : Other Promotion Expense | 4039 | Expense |
| 41500 | Exhibit/Vendor | 4040 | Expense |
| 41510 | Exhibit/Vendor : Vendor Program | 4041 | Expense |

| 41520 | Exhibit/Vendor : On-Site Costs | 4042 | Expense |
|---|---|---|---|
| 41530 | Exhibit/Vendor : Space rental | 4043 | Expense |
| 41540 | Exhibit/Vendor : Security | 4044 | Expense |
| 41550 | Exhibit/Vendor : Insurance | 4045 | Expense |
| 41560 | Exhibit/Vendor : Mgmt Fee | 4046 | Expense |
| 41999 | Exhibit/Vendor : Other Exhibit Expense | 4047 | Expense |
| 42000 | Tutorial Expenses | 4048 | Expense |
| 42010 | Tutorial Expenses : Speaker Fees | 4049 | Expense |
| 42020 | Tutorial Expenses : Travel Expense | 4050 | Expense |
| 42499 | Tutorial Expenses : Other Tutorial Expenses | 4051 | Expense |
| 42500 | Proceedings | 4052 | Expense |
| 42510 | Proceedings : Paper | 4053 | Expense |
| 42520 | Proceedings : Electronic Media Production | 4054 | Expense |
| 42530 | Proceedings : Shipping | 4055 | Expense |
| 42999 | Proceedings : Other Proceedings Expense | 4056 | Expense |
| 43000 | Conference Local Arrangements | 4057 | Expense |
| 43010 | Conference Local Arrangements : Audio-Visual | 4058 | Expense |
| 43020 | Conference Local Arrangements: Ops. Room Equipment | 4059 | Expense |
| 43030 | Conference Local Arrangements : Signage | 4060 | Expense |
| 43040 | Conference Local Arrangements : On-site Temps | 4061 | Expense |
| 43050 | Conference Local Arrangements : Security | 4062 | Expense |
| 43060 | Conference Local Arrangements : Convention Center | 4063 | Expense |
| 43070 | Conference Local Arrangements : Hotel Meeting Rooms | 4064 | Expense |
| 43080 | Conference Local Arrangements : Hotel Penalties | 4065 | Expense |
| 43090 | Conference Local Arrangements : Tours | 4066 | Expense |
| 43100 | Conference Local Arrangements : Transportation | 4067 | Expense |
| 43110 | Conference Local Arrangements : Internet Services | 6768 | Expense |
| 43120 | Conference Local Arrangements : Photography Services | 6769 | Expense |
| 43130 | Conference Local Arrangements : Electrical | 6772 | Expense |
| 43140 | Conference Local Arrangements : Exhibits | 6773 | Expense |
| 43499 | Conference Local Arrangements : Other Local Arrangements | 4068 | Expense |
| 43500 | Food and Beverage | 4069 | Expense |
| 43510 | Food and Beverage : Receptions | 4070 | Expense |
| 43520 | Food and Beverage : Breakfasts | 4071 | Expense |
| 43530 | Food and Beverage : Lunches | 4072 | Expense |
| 43540 | Food and Beverage : Dinners | 4073 | Expense |
| 43550 | Food and Beverage : Special Events | 4074 | Expense |
| 43560 | Food and Beverage : Breaks | 4075 | Expense |
| 43999 | Food and Beverage : Other F&B Expense | 4076 | Expense |
| 44000 | Event Program | 4077 | Expense |
| 44010 | Event Program : Program Speaker Fees | 4078 | Expense |
| 44020 | Event Program : Program Speaker Travel | 4079 | Expense |
| 44030 | Event Program : Paper Review | 4080 | Expense |

| 44040 | Event Program : Student Poster Competition | 6298 | Expense |
|---|---|---|---|
| 44499 | Event Program : Other Program Expense | 4081 | Expense |
| 44500 | Conference Administration | 4082 | Expense |
| 44510 | Conference Administration : Credit Card Fees | 4083 | Expense |
| 44520 | Conference Administration : Bank Fees | 4084 | Expense |
| 44530 | Conference Administration : Travel Grants & Awards | 4085 | Expense |
| 44540 | Conference Administration : Insurance & Bonding | 4086 | Expense |
| 44550 | Conference Administration : Printing/Duplication | 4087 | Expense |
| 44560 | Conference Administration : Postage | 4088 | Expense |
| 44570 | Conference Administration : Office Supplies | 4089 | Expense |
| 44580 | Conference Administration : Freight Shipping | 4090 | Expense |
| 44590 | Conference Administration : Grant G&A | 4091 | Expense |
| 44600 | Conference Administration : Phone Fax | 4092 | Expense |
| 44610 | Conference Administration : Admin Services | 4093 | Expense |
| 44620 | Conference Administration: Admin. Travel & Lodging | 4094 | Expense |
| 44630 | Conference Administration : Society Admin Fee | 4095 | Expense |
| 44640 | Conference Administration : Audit Fee | 4096 | Expense |
| 44650 | Conference Administration : Website Development & Maintenance | 5415 | Expense |
| 44999 | Conference Administration : Other Administration Expense | 4097 | Expense |
| 45000 | Committee | 4098 | Expense |
| 45010 | Committee : OC & TPC Gifts | 4099 | Expense |
| 45020 | Committee : OC Attire | 4100 | Expense |
| 45030 | Committee : Travel | 4101 | Expense |
| 45031 | Committee : Travel : Site Visits | 6774 | Expense |
| 45032 | Committee : Travel : To The Conference | 6775 | Expense |
| 45033 | Committee : Travel : In-Person OTC Meetings | 6776 | Expense |
| 45040 | Committee : Meetings, Conf Calls | 4102 | Expense |
| 45050 | Committee : Secretary Hours | 4103 | Expense |
| 45060 | Committee : Committee Dinner | 4104 | Expense |
| 45070 | Committee : Committee Social Event | 4105 | Expense |
| 45080 | Committee : Student Volunteers | 4106 | Expense |
| 45499 | Committee : Other Committee Expense | 4107 | Expense |
| 45500 | Value Added Tax (VAT) Owed | 4108 | Expense |
| 45510 | Value Added Tax (VAT) Owed : Value Added Tax (VAT) Owed | 4109 | Expense |
| 49000 | Miscellaneous Expense | 4110 | Expense |
| 49010 | Miscellaneous Expense : Miscellaneous Expense | 4111 | Expense |
| 49020 | Miscellaneous Expense : Foreign Currency Translation Adj | 4038 | Expense |
| 49030 | Miscellaneous Expense : Bad Debt Expense | 5951 | Expense |
| 29999 | Retained Earnings | 52 | Equity |
| 20105 | Accounts Payable | 113 | Accounts Payable |
| 11900 | Account Receivable | 122 | Account Receivable |

# Region 3 IEEE SoutheastCon Operations Manual

**ATTACHMENT 2 – Conference Closeout Checklist**

| | WHEN actions/tasks should be completed (Recommended Deadlines) | WHAT actions/tasks need to be done | HOW to complete (Required Docs/Templates) | WHO can I contact if I have questions? |
|---|---|---|---|---|
| | 1 week but no later than 30 days AFTER end date | Submit Conference Proceedings/Content (Xplore CD and other media types) per Letter of Acquisition (LOA) | | IEEE Conference Publications |
| | 1 week AFTER end date | Committee members submit final statistics and lessons learned to sponsoring IEEE OU | | IEEE organizational unit (OU) you obtained sponsorship from |
| | 20 days AFTER end date | Registration clean up (process refunds, receipts and balances due) | | |
| | 1 month AFTER end date | Process outstanding bills | | |
| | 1 month AFTER end date | Repay all loans | | IEEE Conference Finance |
| | 1 month AFTER end date | Submit Post-Conference forecast | | IEEE Conference Finance |
| | 3 months AFTER end date | Distribute surplus | | IEEE Conference Finance |
| | 3 months AFTER end date | Close conference bank account & submit proof of account closure | Closing of Bank Accounts/Destroy Unused Checks Form for Concentration Banking Accounts | IEEE Conference Finance |

| | | | | |
|---|---|---|---|---|
| | 4-5 months AFTER end date | Prepare and submit all audit material to independent auditor<br><br>Co-sponsored conferences, where IEEE has a 50% or less financial responsibility shall be encouraged to participate in the audit process. Conferences where IEEE has greater than a 50% financial responsibility, including conferences that are solely IEEE sponsored, and where the actual or budgeted income or expense is $100,000 or more must be audited by a professional independent source, outside the sponsoring organizational unit. | Audit Report, if applicable | IEEE Conference Finance / IEEE Operations (Internal) Audit |
| | 3-6 months AFTER end date | Submit final financial report with Certification of Accuracy | Final Financial & Certification of Accuracy | IEEE Conference Finance |

**ATTACHMENT 3 – 2020 Region 3 Conference Committee**

| | |
|---|---|
| Conference Committee | Eric Grigorian, Chair |
| Conference Vice Chair Committee | Glenn Parker |
| Director Elect | Theresa Brunasso |
| Past Conference Committee Chair | Sean Haynes |
| Regional Student Activities Chair | Victor Basantes |
| Conference Operations Specialist | Charles Lord |
| Treasurer | John Balsam |
| Former Region 3 Director | Jim Conrad |
| Southeastcon 2019 | Glenn Parker |
| Southeastcon 2020 | Parag Upadhyay |
| Southeastcon 2021 | Wyman Williams |
| Southeastcon 2022 | Hulya Kirkici |

If you need to contact any of the conference committee members, please contact Region 3 webmaster for contact information.

**ATTACHMENT 4 –SoutheastCon Locations**