



IEEE Power Electronics Society  
POWER ELECTRONICS SPECIALISTS CONFERENCE

Operating Guide

[www.pesc-conf.org](http://www.pesc-conf.org)

# IEEE POWER ELECTRONICS SPECIALISTS CONFERENCE

## INTRODUCTION

This guide will assist in the planning and operation of an IEEE Power Electronic Specialists Conference (PESC). Included are general guidelines, suggested procedures, answers to some questions and approximate deadline dates for various stages of development. The guide supplements and augments the IEEE Meetings Organization Manual, produced by IEEE Conference Services and is available on the IEEE web site at <http://www.ieee.org/conferences/conflink.html> .as "IEEE Meetings Organization Manual." The PESC website is <http://www.pesc-conf.org>.

PESC is an international technical meeting for the dissemination and exchange of information on fundamentals and principles of power electronics technologies. Program topics cover design, control, analysis, modeling and simulation of power electronic systems, converters, motor drives, semiconductor devices for power electronics, magnetic devices and materials, capacitors and other energy storage elements and emerging power electronics technologies.

PESC is sponsored by the IEEE Power Electronics Society and is held each year in the early summer. It takes place every other year in the Western Hemisphere (North, Central or South America) and in alternate years in either Europe or Asia.

Operation of PESC is assigned by the Power Electronics Society's PESC Steering Committee to a committee responsible for technical content of the program, arrangements, financial management, publications, promotion and publicity and other conference activities. The technical program is selected by an international panel that reviews submitted abstracts and digests.

The PESC Steering Committee is the primary source of advice, counsel, policy and procedures for developing a conference proposal and managing a conference. It specifies certain practices and requirements that apply to all PESC's (committees will change but consistency and continuity of PESC is critical from year to year). Questions or clarifications? Contact the Steering Committee chair or the PELS Executive Director. The Steering Committee consists of the conference and technical program chairs for the two immediate past PESC's, the current PESC and all future scheduled PESC's. Also on the committee are the President and Vice President-Operations of PEL and representatives of the Society Meetings Committee.

Each operating function is directed by a chair, although some activities may be combined and assigned to a contractor or the PELS Executive Director. If no specific chair exists for a function, supervision will be the responsibility of the Conference Chair or a designate.

Continuity is necessary and there are important rules to observe. However, there is plenty of latitude for change, for updating and for new ideas and techniques. All chairs are working chairs; it is important that each can devote sufficient time to carry out specific assignments. Committee chairs plan, schedule, arrange and implement the conference. The committee meets on a regular basis prior to the conference to review, update and modify activities.

For clarity, the masculine pronouns "he," "him" and "his" are used throughout this guide. No inference should be drawn as participants and chairs include individuals of both genders.

There are special considerations when PESC is held outside the Western Hemisphere.

- The Conference Chair and Technical Program Chair should be from the host country. Generally, however, a U.S. representative should be appointed to assist them and to facilitate working with IEEE Headquarters. It may be advisable also to appoint co-chairs for key responsibilities such as finance and publicity.
- It is essential that persons responsible for PESC have direct experience in a previous conference. Thus, at least the Conference Chair and Technical Program Chair should serve on the PESC Technical Program Committee for the prior year. In addition, several persons from the host country should be appointed to serve on the Technical Program Committee for the conference held in the previous year.
- The deadlines for various items — distribution of the Call for Papers, receipt of abstracts and summaries, receipt of final manuscripts, etc., — may be earlier. Specific details will be coordinated with COWM (formerly Webstracts), a service firm that handles receipts, paper collection and, at the option of the committee, registration and conference proceedings.
- The Technical Program Committee meeting, if held, should take place at a site that is convenient to the host country and at the same time within reach of the committee. It is recommended that the meeting site be convenient to a major airport for ease of travel..

## **1.0 INTRODUCTION**

### **1.1 History and Purpose**

PESC is a series of annual international conferences open to IEEE members and others of all nations. Although it moves from city to city and is held in alternative years in the Western Hemisphere and either Europe or Asia, key elements of continuity exist which should be maintained by all conferences. The operation of PESC from year to year is a growing process, not a competitive one.

The Power Electronics Specialists Conference is a technical meeting of the IEEE Power Electronics Society and has been held annually since 1970. Its main emphasis is on the presentation and discussion of the latest advances in power electronics. PESC brings together specialists in circuits, devices, magnetics, machinery, systems, control theory, simulation and analysis for discussions of new ideas, research, development and applications. The technical program includes theoretical, experimental and application papers that describe original and previously unpublished work.

### **1.2 Sponsorship**

The primary sponsor of PESC is the IEEE Power Electronics Society which provides technical, administrative and financial support for each conference, assists in publicity, supplies organizational support and is responsible for any monetary surplus or deficit. A local IEEE entity has acted as a co-sponsor several times in the past, providing involvement in technical, administrative and financial areas. A co-sponsor shares in any surplus or deficit but in no case will financial participation exceed 50%. A co-sponsor can provide local support to lessen the workload of the conference committee and to contribute to the financial success of a conference. Because PESC almost always generates a surplus, sharing of financial reward and risk is generally not advantageous to PESC unless the Chair obtains significant help in reducing the workload or improving the conference. Co-sponsorship requires the approval of the Meetings Committee.

Other organizations and societies may participate as "technical co-sponsors" or "cooperating" entities. They encourage their members to attend the conference and to submit papers for presentation and assist in the dissemination of publicity. These organizations allow the PESC conference use of their names but are not involved in administrative or financial aspects. They should be listed in conference programs and the Conference Proceedings.

### **1.3 Submitting a Conference Proposal**

The early organization of a qualified conference committee is a critical step in preparing a successful PESC.. A call for proposal is advertised in the PELS Newsletter. The decision on PESC locations is normally made five years in advance by the PESC Steering Committee which meets each year during the PESC conference. The proposal should give details of the location, facilities, preliminary budget and identify the conference chair.

## 1.4 Organizing a Conference Committee

The conference committee is composed of the chairs of all conference committees -- program, finance, arrangements, publications, publicity, etc. The committee is the conference organizing and operating authority and is responsible for the staging of all aspects of the conference under the direction of PESC Steering Committee.

The committee prepares and submits the conference proposal to the PELS Meeting Committee, establishes the conference schedule, directs the activities of working committees and manages the conference from the submission of the proposal to completion of the post-conference reports. The specific committee organization and the number of people assigned to each function should be tailored to the needs of the individual conference (figure 1). Each committee chair may appoint a co-chair or vice chair. The Technical Chair usually is nominated by the Conference Chair. The PESC Steering Committee, however, should be consulted on the selection because the technical program is the heart of the conference and the technical program evolves somewhat independently from other aspects of a PESC Conference.

Some conferences held in university facilities have used university conference services which takes responsibility for many of the physical aspects of PESC - registration, arrangements, housing, etc. Conferences held in commercial properties may separate those assignments into committee responsibilities. When PESC is held in the Western Hemisphere, these assignments may be carried out by the PELS Executive Director, who assists all committee members in organization and implementation. Technical chairmen have relied on a series of topic coordinators with specific technical disciplines. A smooth, well-coordinated committee operation is the objective and there is no restriction of the committee structure so long as the objective is achieved.

Committee membership represents a major commitment of time and energies. Some — but certainly not all — of the planning and organization takes place outside the business day and members' employers must understand the need for significant commitment on behalf of committee members and their organizations.. This commitment may involve secretarial support, filing, mailing and duplicating resources, meeting facilities and, often, assistance during the conference. It is important that the reality of this commitment be known when the committee is organized.

IEEE requires advance filing of four documents displayed below – a Budget, Conference Information Schedule, Publications Form and an application for IEEE insurance. Form are available via e-mail from the PELS Executive Director (bob.myers@ieee.org). Please return completed forms to the Executive Director for filing with IEEE. There is also a requirement that an IEEE executive have signing authority on the conference bank account “just in case.” Send a bank signature card to the Executive Director who will obtain the necessary signature and return it to the conference committee for filing with the bank. In rare cases, a bank may not accept a signature unless the individual is physically present in the bank. In such instances, notify the Executive Director who will advise IEEE.



conferencebudgetfor  
m.xls



"Conference Info  
Schedule.doc"



"Conference Pubs  
Form.doc"



"Conference  
Insurance Form.doc"

After the PELS Meetings Committee and AdCom approves a conference budget and an advance loan, - usually 12-18 months before the conference - send the loan request to the Executive Director who will route to IEEE Conference Services.

## 2.0 GENERAL PLANNING

### 2.1 Conference Proposal

Conference planning normally starts at least five years prior to the conference. The conference begins its official existence when the PESC Steering Committee approves a conference proposal usually five years in advance.. But the committee is born sometime before that to create and pull together the elements of the proposal. The Steering Committee meets once a year — at PESC. . Proposals for future PESC's will be considered by the Committee at these meetings. The PESC Steering Committee oversees the operation of the conference and each conference committee is required to review its plans and update its budget on an annual basis.As a minimum, a proposal should include the conference theme and the following three elements:

**Conference Arrangements** — A time and place for the conference must be proposed. It may not be possible at this stage to identify specific dates or meeting places but the proposal should include suggested weeks in the mid-to-late June time period and alternate sites that could be used. Be careful in selecting dates to avoid any conflict with secular or religious holidays or with other IEEE conferences sponsored by the IEEE Power Electronics Society or the IEEE Industry Applications Society.

**Organization** — Key members of the conference organization should be identified, along with the commitment to support the conferences and, where appropriate, resumes of their experiences with other conferences. All chairmen should be members in good standing of the IEEE.

**Budget** — The financial budget should be prepared using the IEEE Technical Activities financial form (see Attachment 1). The form should be filled out completely with special attention to the registration fee schedule, the expected number of registrations, income from publications and additional income. A budget of expenses should pay close attention to meeting room expense, meals and banquet functions, publicity and printing. Plan for a surplus to accommodate any unexpected costs. Estimate income on a conservative basis and consider "worst case" potential in anticipating expenses.

### 2.2 Master Plan

A conference master timeline is to be submitted to the PESC Meetings Committees at least 18 months prior to the conference. This plan must include schedules, activities and responsible committee member(s). The plan is to be updated regularly and submission must be made to the Steering Committee to the Meetings Committee and the Society AdCom on an annual basis or as requested. (Attachment 6) Individual conference schedules vary in detail but most include the actions in the schedule example. Each committee should develop its own schedule of milestones so its activity chair and the conference chair can track progress.



"Universal TimeLine  
and TaskList.xls"

## **3.0 CONFERENCE CHAIR**

### **3.1 The Chair's Role**

The Conference Chair has responsibility for all activities and operations concerning PESC. His assignment is to select and supervise all committee chairmen and to monitor their activities to assure events progress in a satisfactory manner. He presides at committee meetings and is responsible for their scheduling and execution. He is the chief operating officer of the conference, reporting with the Technical Program Chair to the PESC Steering Committee. Both are members of the Meetings Committee and Steering Committee with five-year terms beginning two years prior to the conference and concluded two years after the conference. The Committee acts through the conference chair in operational matters relating to PESC.

### **3.2 The Chair's Duties**

He is the contact point responsible for

- scheduling conference committee meetings and notifying all participants
- developing meeting agendas and chairing meetings
- assuring subcommittees meet milestones within the planning schedule
- advising the finance chair of all financial commitments and changes in income and expense expectations
- "calling for help" when need be and seeking the advice of the Meetings Committee

The Conference Chair is the "master of ceremonies" of the conference, delivering opening remarks on the first morning and, except in special circumstances, presiding at plenary sessions, luncheons and awards presentations. He signs any written invitations to keynote and luncheon speakers.

At the close of the conference, each chair will furnish a final report on his specific activities to the Conference Chair. Each report is to include documentation of any expenditure of funds. The Conference Chair, in turn, will furnish a detailed report to the Steering Committee, including all available financial information, a list of names and addresses of conference registrants (on disk in a specified format) and suggestions for improving the next conference (lessons learned). The report later is submitted to the Meetings Committee and AdCom.

The Conference Chair oversees the distribution of surplus monies, if any, coincidental with the filing of the final report. The conference bank account should be closed at this time, if possible. If not, specific mention should be made of the commitments not yet settled and of the amount in the bank account to settle them. A preliminary financial report is to be issued within three months after the conference and any advance loans should be repaid within 30 days of the conference closing. An audited final report is to be prepared as soon as all financial obligations are settled and will be submitted to the Steering Committee, the PELS AdCom and IEEE Headquarters possible. IEEE requires an audit of the financial records and the final report (see Section 10.6) must be performed by an independent auditor. The IEEE can provide such an audit if requested. Failure to file a final report within one year of the conference close will result in a fine levied by IEEE.



## **4.0 VICE CONFERENCE CHAIR**

### **4.1 Relationship to Chair**

He is the second-in-command and acts as Chair in the absence of the Conference Chair. His specific duties include securing keynote and luncheon speakers and arranging for their accommodations where needed (if appropriate and necessary, the conference bears travel and hotel expenses only for keynote and featured speakers) and supervising the physical setup for their presentations (including audio-visual). In this latter context, he works with the person(s) responsible for arrangements.

He is responsible for securing backup speakers in the event scheduled speakers are unable to attend — most speakers provide a replacement if they cannot appear.

### **4.2 Activity Coordination**

The Vice Chair coordinates publicity and attendance promotion efforts so that they work in concert to attract the largest possible attendance.

## 5.0 TECHNICAL PROGRAM CHAIR

### 5.1 General Responsibilities

The technical program is the heart of PESC and must be of the greatest possible technical and educational value — it is the forum for technical interchange. It attracts attendees to the conference, stimulates discussions during the course of the meetings and provides a permanent record of the technical presentations.

The Technical Program Chair is responsible for the program including selection of a theme and organization of the technical sessions. It is recommended that vice chairs – or topic chairs - be recruited to coordinate specific subject areas on the program and to identify reviewers and supervise the review processes. Industry, universities and government agencies should be appropriately represented among the reviewers. The chair and his deputies contact all prospective session chairmen and aid them in identifying and working with author/speakers -- in most cases, session chairmen assume the responsibility for contacts and follow-up with authors for their sessions. The Technical Program Chair establishes the ground rules for the selection of papers and retains the right of final selection of papers, session chairs and participants in panels, regardless of which responsibilities he has delegated to others. He keeps a running log of all abstracts, receipt dates, authors and their affiliations, status in the evolution process, author notifications, final papers received and session assignments.

Abstracts, reviews, information to authors, author kits and final manuscripts are submitted via e-mail and, if available, an ftp site. **Postal mail and fax delivery of abstracts and papers are no longer accepted.** Abstracts and papers are processed by GOWM through its Webabstracts. web server retained by the conference (Section 5.2)

### 5.2 On-Line Conference Services

PESC has contracted with a firm in Vancouver, Canada (Dave Pataky of GoldenOrb WebMedia, GOWM) to provide on-line submission management services delivered through the webabstracts.com web site. The nature of the service provided by GOWM is flexible, and can be customized from year-to-year. The Program Chair is the main point of contact between PESC and GOWM, and directs the delivery of services.

GOWM provides an on-line submission management site ([www.webabstracts.com](http://www.webabstracts.com)) which includes permanent, persistent profiles for all users. The persistent profiles allow reviewer preferences and performance to be monitored from year-to-year. The submission management site covers abstract/digest submission, peer review, final acceptance and program creation functions. GOWM also prepares the submitted material for publication by PESC, including the printed proceedings and CD-ROM.

The conference registration service can be integrated with the submissions database. Authors of accepted papers and the conference organizers can easily manage registrations and ensure all authors meet the registration requirement for publication of their papers.

GOWM will establish a testing site prior to the Call for Papers to allow organizers to fine tune the submission steps. The address of the testing site (a unique address for each PESC provided by GOWM) will become the final submission site address once the Call for Papers is open. Members of the Program Committee should examine the site, and in particular, provide the current list of Topics to GOWM, review the submission format instructions and the volunteer reviewer instructions. The submission format instructions are available with or without logging in to the site. Site testers should proceed through a complete submission to ensure all the required information is being collected. When authors create a new profile, or log into an existing profile from the previous year, they are asked to create (or confirm) their volunteer reviewer status. Authors may choose to participate as reviewers in at least one and up to four topics. The number of Topics available is at the discretion of the Program Chair, and needs to be decided in advance of the Call. Once the site operation is acceptable, the Call for Papers can begin.

In general, authors log in to their profile (or if they don't already have one from last year, create a new one by entering their contact information into the on-line forms), and are reminded their submissions should be formatted following the posted instructions. There are five steps to the submission process:

1. select the topic, provide the title, abstract and references
2. enter the authors and affiliations
- 3: request the presentation format, A/V requirements, and any other information
- 4: transfer the PDF digest to the webstracts.com server
- 5: review submitted data and finalize when complete

GOWM will monitor the submitted papers for serious formatting errors and will edit any inclusions of author identifying information (names, email addresses, references). Since most of the digests arrive in the final 2 days of the Call for Papers, GOWM will continue monitoring the digests for up to 1 week after the close of the Call. The Program Chair may also allow extra time for authors to submit past the submission deadline at his discretion.

The Technical Program Chair and others (at the Technical Program Chair's discretion) have access to an administrative site where the progress of the Call for Papers can be monitored. As submissions are received, they are numbered sequentially and categorized to assure easy reference. Authors are notified by e-mail acknowledging receipt and advising of the review process and when they can expect to be notified about acceptance or rejection. A master list of all papers should include the assigned paper number, title, author(s), category, reviewers assigned, acceptance or rejection, reviewers' scores and average rating.. This list will be valuable later in preparing advance and conference programs and the Conference Proceedings.

Papers will be selected on the basis of a review of an abstract and summary. . All papers must be prepared in the English language. No paper previously published or presented at any conference will be accepted. Whenever possible, each paper should be reviewed by three or four experts in the specific areas of power electronics covered by the submission.

Complete and detailed instructions are sent to reviewers with the papers for review. These instructions should describe the method of rating and include the deadline for completing reviews

and the date, time and place of the Technical Program Committee meeting (if scheduled). Standard review sheets must be included to assure uniform judging. When completed review forms are returned, they are added to the master list of papers. Enter review ratings and reorder papers according to score, from highest rating to lowest.

The Technical Program Committee meeting determines the number of sessions to be held, the number of papers presented in each session and the length of each presentation and the grouping of accepted papers into sessions. Session titles are selected as are chairs and co-chairs. When program selections are completed, the Technical Program Chair supplies detailed information to the Publications Chair and advises the Arrangements Chair the facilities needed for the program.

## **5.2 Conference Website**

Each PESC maintains its own website with a separate URL address. The site is linked to a PESC address – [www.pesc-conf.org](http://www.pesc-conf.org) – which serves as a gateway to the current and future conferences. Thus, conference participants who don't know the individual PESC address can access conference information through the master account. This central website also contains the PESC Operating Guide and appendices.

The website for the current PESC contains full information on the conference as it becomes available, beginning with a preliminary announcement and call for papers and expanding as the individual PESC takes shape. Separate features will include

- Call for Papers
- instructions for submitting digests and submission forms (author kit)
- any progress reports
- the full technical program when available
- conference registration and hotel reservation forms – please remember that PESC attendees come from around the world and early reservations often are necessary
- information on the site city, perhaps a link to a local convention bureau website, and other local information including ground transportation and costs
- any tours or events for guests will be documented.
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A number of countries have imposed new visa requirements and general procedures for obtaining documentation in a timely fashion is helpful

## **5.2 Call for Papers**

The Call for Papers should be distributed one year but no later than 10 months prior to the opening day of the conference. It is strongly recommended that the call for papers for next year's PESC be available at the prior year's conference. The Call should emphasize the theme of the conference and the suggested topic areas. Assisted by members of his committee, the Program Chair will compile a list of prospective session chairs for the topics represented in the call. The Program Chair gives final approval to the Call for Papers before publication.

The Call should be placed on the PESC website and mailed to the PESC mailing list consisting of past and current authors and attendees. The Technical Program Chair should provide the PELS Executive Director with the names and addresses of all authors submitting summaries, all reviewers and all session chairs so they can be added to the Society mailing list and coded according to PESC involvement. The Call should be printed in full in the PELS Newsletter. Notices should be sent to newsletters of IEEE societies with similar interests (e.g., Industry Applications Society). Narrative versions should be mailed to IEEE Spectrum and trade publications which often print calls.

The Call should contain explicit instructions, assuming many are first-time authors and need detailed information. Deadline for submission of papers should be mid-November to allow time for the review process in advance of the paper selection meeting in January.

A Call for Papers must include the following:

- A statement of the conference theme and suggested topics of interest
- Summary due date, authors' notification date and due date for complete paper
- Instructions for preparation of the summary and mailing address for abstracts

A clear and realistic schedule must be prepared to allow time for writing, review, corrections and printing. Detailed instructions on manuscript preparation should be placed on the website with information on format, length of paper summaries, use of illustrations, copyright forms (see Author kit) and registration requirements. All authors must receive acceptance or rejection notices no later than the deadline date stated in the Call for Papers. It is the Program Chair's responsibility to establish a procedure for logging and filing abstracts, distributing copies to session chairs and notifying authors of acceptance or rejection. The schedule should allow six to seven weeks for review and selection of papers and two months for preparation of papers after authors have been notified. All dates reflect the publication schedule for the Conference Proceedings.

Authors should be contacted in advance of the conference to assure they will be present — authors whose papers have been accepted shall personally present their paper or provide a knowledgeable alternative speaker for the conference. Authors are required to pay full registration fees with submission of their papers. PESC policy specifies that each paper must be accompanied by at least one full registration.

### **5.3 Program Content**

The objective of the conference is to give the widest possible exposure to subjects and authors in the power electronics community. Thus, these general guidelines should be followed whenever possible

- Only one session chairman from any one organization.
- No more than one paper from a single organization in any one session. (it is understood that occasionally a topic is in the expertise of only one or two organizations and exceptions from the groundrules must be made):
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## 5.4 Conference Program

**Single or Multiple Sessions?** — Single sessions focus the technical program on particular subjects. However, single sessions limit the number of papers which can be presented and, therefore, restrict the scope of the conference. Multiple sessions offer simultaneous, competing presentations with wider exposure of authors and subjects. When multiple sessions are planned, they should appeal to different technical interests - multiple sessions should complement, not compete.

**Panels** — Panels offer a change of pace from the more structured presentation of papers and can be effective if the subject is of timely interest and, particularly, if the panelists are provocative communicators. Panels generate discussions and controversy and are best used to add contrast to technical paper sessions.

**New Technology** — A fast-breaking technical development worthy of adding to the program can be handled as an invited presentation and not published in the Conference Proceedings.

## 5.5 Papers per Session

Sessions generally are programmed for two to two-and-one-half hours. Each paper typically is allotted a total of 25 minutes; 20 minutes for presentation and five minutes for questions. A minimum of four papers should be planned for each session.

Papers seldom are prepared at the same time as summaries. Invariably, some selected papers will not materialize due to clearance problems, job changes, new priorities, etc. Speakers who cannot attend the conference because of serious circumstances are required to provide a substitute presenter.

Session chairs are responsible for maintaining time schedules and encouraging discussion -- some speakers tend to extend their presentations, leaving little or no time for questions.

## 5.7 Seminars

PESC may include seminars on key subjects as part of the technical program to provide introductions and updates on technology. These seminars should complement subject areas covered in the technical program and should not conflict with sessions dealing in these areas. These tutorial sessions generally will run two to four hours.

## 5.8 Tutorials

Formal tutorials or short courses are designed to introduce less experienced power electronics professions to a specific technical area, to provide technology updates or to present a new field of technical concentration. Tutorials usually are presented the day prior to the opening of the conference (see Section 6).

## **5.9 Rap Sessions**

One evening of the PESC conference is devoted to rap sessions with presenters conducting audience forums on key issues in power electronics. Sessions can be technical in nature or deal on a non-partisan basis with industry, government or social matters affecting power electronics. An overall moderator coordinates selection of topics and identification of presenters.

## **5.10 Invited Papers**

Occasionally a subject or speaker offers a potentially interesting paper candidate or spotlights some special technical area. When this occurs, the Technical Program Chairman may choose to invite papers or he may authorize the session chairman to invite one or more papers. PESC attempts to give the widest exposure to significant new work, new concepts and status on current programs. The Call for Papers will attract new authors and new subjects. Invited papers should be limited to maintain a balance of new authors and those who have had prior exposure.

## **5.11 Author Kits**

Instructions to authors for preparing papers for publication in the Conference Proceedings are provided to authors via e-mail and on the website. The author kit contains instructions for electronic filing of the final manuscript, an IEEE copyright form, author's guide, and conference and hotel reservation forms. ALL accepted authors are required to register and pay registration fees.

## **5.12 Authors/Session Chairman Perks**

The quality of the technical program dictates the success of the conference. To attract top chairmen and authors and speakers, it is recommended that these individuals be treated with special attention:

- Authors/Chairs Breakfast - This is a meeting place before the day's sessions. It may be the first time chairs and authors meet before they appear on the conference floor. The Program Chair is responsible for notifying speakers and authors that they are expected to attend the breakfast the day of their presentations. The Arrangements Chair orders breakfast and provides a projected headcount of expected attendees.
- Identification Ribbons - Session chairs and authors are to be provided with ribbons attached to their badges.
- Mementos - It is important that a program participant have something by which to remember the conference. Presenting authors, speakers and session chairs should receive a certificate or memento in recognition of their contributions. Mementos should be personalized with the conference logo and locale.

### 5.13 Duties of Program and Session Chairs

The Program Chair should send each session chair a complete set of the full papers for the session as soon as they are received so that there will be adequate time to review them before the conference.

In addition to notifying the contact author that a paper has been accepted and providing the author's kit, the Technical Program Chair should advise him that there will be an author's breakfast with instructions for the day on the morning of the day that the paper is scheduled to be presented. Authors should also be notified that IEEE policy dictates that all authors and attendees must pay for registration.

At the author's breakfast hosted by the Technical Program Chair, to prevent confusion, especially among overseas authors, each session should have its own separate table identified properly with a sign. There should be place cards for each speaker at each table and the session chairperson. The session chairs should convey a friendly helpful attitude to the speakers, recognizing that for some this is their first paper, for others this may be their first presentation in English.

After the Program Chair provides general information, each session chair should escort the speakers in his session directly to the room in which the session is to take place during the day and acquaint the speakers with the podium and podium microphone, the LCD projector and its operation. The conference encourages the use of LCD projectors only and no longer provided with overhead projectors or 35mm equipment.

It may be necessary in some cases to assist an author with loading and controlling the LCD.

The need to keep presentations within a proscribed time limit must be explained. The chair should emphasize that in fairness to all of the speakers and the audience, the speaker must conclude his talk even if it is not finished when time runs out. Instruct the speakers that the session chair will take over the podium immediately at the end of the talk, and that the session chair will ask the audience for questions, if there is sufficient time. To function as a session chairperson in a professional manner, he should:

- Make sure that all audio/visual equipment is in working order before the session begins.
- Know exactly how and where to place the speaker's lavalier or clip-on microphone and do this before the introduction.
- Have a short biography of the speaker prepared (and collected at the author's breakfast). Usually, only a minimal amount of information is given about the speaker, none on the coauthors other than names.
- Stand at the end of the talk and start the applause if the speaker does not make a clean well-defined ending so that the audience is not clear that he/she is finished.



- Immediately take control of the podium at the conclusion of the talk and ask for questions from the audience if time permits. The speaker should not be the one to ask for questions. The questioners should be asked to identify themselves and their organizations before asking questions. Try to get the questioner to ask only one question at a time.
  - Be prepared from a review of the full papers to ask an initial meaningful question if none are forthcoming from the audience.
  - Help interpret each audience question, repeating it if it appears that the audience did not hear it well. This is especially important with international speakers. If it appears that a speaker is unable to understand or answer a question, suggest that the questioner and the author get together at the end of the session to discuss the matter.
- Thank the speaker for the presentation, be certain, if used, to remove the wired or wireless microphone from the speaker.
- Conclude the session by thanking the authors for their contributions and the audience for its attention and support.

This is certainly not anything more than a start on putting down on paper the things that are done for the most part at every conference. However, the material may be useful to first-time session chairs.

#### **5.14 Some Suggestions for Speakers**

Here are some examples of poor techniques which can be avoided if a speaker's consciousness can be raised in advance:

- Starting with something like "I didn't have time to prepare my talk, so I'll just ramble along and stop when the time is up."
- Dropping the voice toward the end of a sentence.
- Using a casual conversational voice; it is just as important to project your voice when using a microphone as when speaking without one.
- Using a lot of abbreviations, symbol names, or acronyms; the time spent in saying in words the meaning of such terms is well worth it.
- Visuals should be carefully inspected before leaving home by projecting them and studying them for readability at the rear of a large room. Examples of poor techniques are fuzzy, out-of-focus or poor contrast displays and slides with too much material, such as a full page of equations from the paper.

## **6.0 TUTORIAL CHAIR**

### **6.1 Background**

PESC often sponsors tutorial sessions or courses aimed at the working engineer. These pre-meeting tutorials were initiated as a primer in the more theoretical areas of power electronics, these areas being a prerequisite to application of modern analytical techniques. Conference attendees expressed an interest in a tutorial session that might make the PESC program more understandable. Accordingly, all-day sessions may be staged the day prior to the beginning of the conference so as not to conflict with PESC activities. Topics for tutorials are selected by the Tutorial Chair in consultation with the Technical Program Chair.

### **6.2 Guidelines**

The program should be of high quality and fundamental in nature, treating the theoretical foundations of power electronics. It should be directed at the graduate engineer level. The tutorial may either be a half-day (four hours) or full-day session (six to eight hours). A workbook or set of notes should be published for the use of course attendees during the session. This should, at a minimum, contain all charts and figures included in the presentations. It is preferred that some lecture material or explanatory text be included in the workbook.

### **6.3 Fees and Expenses**

Since the tutorial may be expected to require considerable preparation, compensation is provided for those presenting the tutorial, at a level equivalent to that provided in an industrial or university environment. Expenses for publication of lecture notes and visual aids should be compensated over and above any professional compensation. The Conference Chair has discretion over the specific fee formula. A percentage of the gross receipts, after expenses, may be agreed upon, thereby minimizing financial risk to the conference. A minimum fee may be specified to assure an adequate compensation in the event of low attendance. The tutorial must be included in the Conference budget.

### **6.4 Duties and Responsibilities**

The Tutorial Chair selects an appropriate subject for the annual tutorial. The Conference Chair then appoints an organizer/developer, establishes and negotiates the compensation formula, consults with the organizer to ensure high standards and confers with the Finance Chair on fees for course attendance. The course organizer develops and presents the tutorial on the selected subject, including publication of the course workbook. The Finance Chair reviews the tutorial fee schedule and costs as part of the conference budget analysis and collects and disburses tutorial monies as with any other conference activity. The Technical Program Chair coordinates with the Conference Chair on subject matter selection and standards enforcement.

## **7.0 PUBLICATIONS CHAIRMAN**

### **7.1 Range of Responsibilities**

The Publications Chair has responsibility for preparing and supervising the advance program, the Conference Proceedings (IEEE specifies the name "Conference Proceedings" instead of "record" or "digest), the conference program - in short, all materials required for the conference. He arranges for printing, scheduling and obtaining approvals from authors to publish their papers - no paper may be published without this consent (and every speaker must submit a paper); company clearance may be required and must be supplied by the author. No material bearing a federal government security classification will be considered or published.

Only papers presented as part of the conference program may be included in the Conference Proceedings. All authors must register at the time they submit their papers to assure inclusion in the Proceedings. Only electronic submissions of papers in a specified format will be accepted. IEEE requires that papers be available in a PDF format to meet the specifications of the IEEE Xplore program. However, the GOWM service may request filing in another format and it will handle final conversion.

A Conference Proceedings is provided in electronic (CD-ROM) format and is distributed at registration to each paid registrant. A limited number of printed proceedings – usually with advance signups - are available for purchase during the conference or may be obtained after PESC through IEEE Customer Service. IEEE holds the copyright on all papers and provides electronic and in some cases hardcopy proceedings to libraries and other subscribers. A pre-specified royalty will be paid to the conference for each proceedings – electronic or hardcopy – provided to subscribers. Under present practice, IEEE will take a small number of proceedings CD-ROMS but will not provide compensation. IEEE will advise the Publications Chair of the arrangements for providing proceedings files.

### **7.2 Preparation of Technical Papers**

The Publications Chair works with the Technical Program Chair in establishing deadlines for receipt of papers and in assuring proper preparation of papers for publications. The Technical Program Chair should arrange for the papers to be submitted electronically in the IEEE-approved pdf format before they are turned over to the Publications Chair. In many cases, progress reports referring to paper numbers assigned on submission are published on the website.

Normally, the Conference Proceedings will contain the full (six page) papers presented. The Publications Chair establishes a timetable with the printer consistent with the overall conference schedule. This schedule includes key dates for receipt of manuscripts, review of material, approval of final art and delivery of finished product. The Chair interviews several reliable printing firms and CD manufacturers and reviews price estimates or bids. It is not uncommon to use different printers for different publications.

### 7.3 Printing

It can help to work with a printer and CD manufacturer with experience in IEEE publications or who knows the intricacies IEEE requirements and procedures. This knowledge can provide valuable advice and economies as well as keeping the Publications effort on the proper track. Webabstracts.com can identify and help select printing sources and coordinate the production process.

Graphic and printing costs for announcements, calls for papers and programs will be significant and should be anticipated and budgeted. If help can be arranged from in-house capabilities of companies represented on the conference committee, the conference can achieve sizable savings. Use a professional for the Conference Proceedings. Publishing cost of the Record is on a page basis and expect to pay the printer approximately 4 cents per page per copy (2003 prices) based on camera-ready material. Thus a Conference Proceedings of 1,500 pages would cost about \$75.00 per copy. Please remember shipping costs to the conference site are additional.

The Conference Proceedings can serve a dual purpose at the conference by including sections listing session times and locations, luncheon speakers and special events. The Chair works with the Arrangements Chair to make certain places and times are correct for publication in the Conference Proceedings and the advance program. He works with IEEE Headquarters regarding IEEE catalog, ISBN and Library of Congress registration numbers. This information is available from IEEE Conference Services and it is the responsibility of the Publications Chair to assure that it is obtained.

Make sure the Proceedings are received in time from the printer — a week before the conference, if possible. All proceedings are produced from electronic formats. Printer needs may vary and the Publications Chair should work closely with this source to assure continuity.

### 7.4 Conference Proceedings Content

**Cover:** Design is an option. It may reflect the Conference theme or location. The cover should include two things: PESC with the two-digit year date and a unique catalog number designated by IEEE Conference Services.

**Title Page ii:** Name, dates, location of conference and Conference publications numbers (IEEE, ISBN, ISSN, perhaps Library of Congress)

**Statement of IEEE Responsibility:** Standard copyright and reprint item inside title page.

**Chair's Message:** This is a statement by the Conference Chair, usually welcoming attendees.

**Conference Committee:** The organization, committee officers and their company affiliations. It also can identify the PELS AdCom and Meeting Committee.

**Table of Contents:** Lists each technical session, papers assigned to that session and the authors with specified page designations.

**Technical Papers:** The technical papers are printed and organized under their specific sessions. Responsibility for company/military release of individual papers resides with the authors.

**Optional Contents:** Indices by authors and organization, dedications or honors conferred. Avoid inserting individual (loose) copies of papers which failed to make the printing deadline in the Conference Proceedings. Authors must be advised when their abstracts are accepted that papers must be delivered on time or they will not appear in the Record. Loose papers cause confusion at registration and at the technical session and there are never enough to satisfy requests.

#### **7.4 Format and Style**

Instructions on how to use the IEEE logo, layout, cover and for binding are provided in the IEEE Meetings Organization Manual, ([www.ieee.org/](http://www.ieee.org/) click on conferences, then information for conference organizers and Master Brand) .

#### **7.6 Advance Program**

The advance program is placed on the web site and mailed selectively two to four months before the conference and contains a preliminary program containing all scheduled session titles, paper titles and authors - please note that a disclaimer specifying the program is preliminary should appear in the text - announcement of tutorials, features about the conference site and city and other pertinent information. If any printed copies of the advance program are produced, the format should be a self-mailer folded pamphlet slightly smaller than a #10 envelope (a number of potential attendees live abroad and self-mailers are not permitted in international mail). For self-mailers, the bound edge or fold should be at the top (postal regulations). Please allow enough space - 3 1/4 inches - for addressing. If the return of undelivered pieces is desired, the phrase "return requested" must be placed immediately below the address line. Also on the envelope on the right side below the stamp position should be the phrase "first class mail."

#### **7.7 Mailing Advance Programs**

Physical mailing of advance programs should be discouraged if possible. However, there will be a few cases where hardcopy is required. Printing of small quantities should be avoided and consider photocopying and a "quick print" shop.

## 8.0 ARRANGEMENTS CHAIRMAN

### 8.1 Overview

The Arrangements Chair has responsibility for arranging and supervising meeting facilities (including evaluating meeting rooms for acoustics, ceiling heights and air conditioning), hotel reservations (standard hotel policy provides one free sleeping night for every 50 sleeping nights sold) and social activities, including meal and food functions. He reserves meeting rooms, luncheons, banquets, registration area and any other specified facilities within the hotel. He also handles audio-visual needs, coordinates any conference hospitality activities (special meetings, PELS AdCom, Meetings Committee, PESC Steering Committee, technical committees), obtains necessary tables and chairs, secures security guard(s) (if needed) and coordinates overnight storage of cash boxes, computers and other valuables. He negotiates any contract with the facility and oversees its execution. He works with the facility to develop reservation policy/procedures.

Every effort should be made to hold as many conference activities as possible — an exception may be the mid-conference social evening or special before or after tours — in the same facility. In the event some events have to be scheduled elsewhere, find a location no more distant than one block from the headquarters facility.

**In dealing with a conference facility, it is vital that one person be designated by the conference as its spokesman -- that person normally is the Arrangements Chair and he should be the only individual instructing the facility during the conference — other chairs should attempt to provide him 24 hours' notice for any new arrangements. Likewise, the facility should have one key contact for the conference. This “single source” helps avoid conflicting instructions to the facility and any possibility of a "divide and conquer" policy by the facility. Further, it is critical that only the Arrangements Chair and/or the General Chair may authorize any conference-charged expense at the host hotel.**

### 8.2 Support of Technical Program

Working with the Program Chair, the Arrangements Chair determines well in advance the needs of the various speakers for audio-visual needs - LCD (assigned to every meeting room), lavalier or standing microphones, lecterns, pointers, blackboards and screens. The chair also should make certain there are paper, pens, water and glasses for the speakers. He arranges for signs -- at the registration desk, at the door to session rooms and where other directional indicators are needed (the number of signs is determined by the Arrangements Chair in consultation with pertinent chairmen). He makes certain the conference is listed on the hotel or facility meeting board and outside marquee for the day(s) and checks their accuracy each morning.

It is difficult to estimate beforehand which sessions will have the greater attendance. Try to select facilities offering some flexibility in meeting room size. It's a real advantage to be able to expand a room set for 100 people to accommodate 150 — or to pull off the reverse.

Attendees remember the glitches of a conference long after they have forgotten the positives. Meeting rooms must be of high quality and audio/visual equipment must be first rate. Preferred

meeting room setup is "classroom" with tables and chairs. Cloth covered seats are favored. The Chair or his designated alternate must be available at all times during the conference to make certain arrangements are carried out, to verify all ordered equipment is operating properly and to handle any emergency that might arise. It also is the responsibility of the Chair at the close of the conference to assure that all equipment is returned promptly, to personally check bills for submission to the Finance Chair and to thank suppliers (hotel, support crew, etc.) for their efforts.

### 8.3 Audio/Visual

Projectors must be powerful and screens large so all persons in the room can see comfortably. Do not try to get by with a "home" style system — an exception is a rap session — and budgets should include rental of high quality equipment. Most hotels work closely with an audio/visual company and while that supplier is convenient, the conference has no obligation to use it.

If laptop computers are not available for session rooms, specify that speakers bring their own. Or designate the session chair to have a laptop for the full session.

Be certain that equipment is in working order and there are spare bulbs for LCDs. A burned-out bulb without a replacement can ruin a technical session – and bulbs are relatively easy to change. Other important items to check are procedures for loading and changing CD-ROMS, room light dimming capabilities, availability of lectern lights and suitable pointers and types and locations of microphones for speakers and for the audience.

Rap sessions generally attract 50 or fewer attendees and it may be preferable to use home-type equipment. Extensive slide shows are discouraged at rap sessions so expensive equipment should not be provided to encourage elaborate presentations. An overhead projector and/or blackboard should be in each rap session room to facilitate spontaneous discussion.

Following are particulars for audio/visual arrangements:

**Podium:** Podium should have adequate space for the speaker's notes and a reading lamp such that notes are easily read in case the house lights must be dimmed to a low level.

**Projection Screen:** Screens should be large enough that audience members at rear of room can read the material on a technical slide. As a suggestion, a minimum size is 10' by 10'. Place the screen in a position so that the speaker may comfortably point to projected material.

**Screen Pointer:** AC-operated incandescent-lamp projection-type pointers seem to be the most effective. Most red laser-type pointers do not seem to be as visible as the incandescent-lamp type.

**Overhead Transparency Projector:** The default projector for conferences is the computer-powered LCD. The projector is operated with a remote control device. Visuals are stored on a CD-ROM and projected onto a large screen. The LCD should be loaded and tested before a scheduled session to allow necessary adjustments. This will save time and confusion and assure an efficient beginning to a presentation. Care should be taken to locate the projector so that it does not block images projected from the slide projector

**Speaker Microphones:** A traveling microphone should be provided for the speaker. Don't be persuaded by a speaker that one is not needed; insist that it is necessary so that all may hear. The microphone may be either a wired or wireless unit. If a lavalier microphone with neck loop is used, adjust the loop to get the microphone as high as possible. If a tie-clip microphone is used, attach the unit as high as possible on the speaker's clothing directly under the chin, not to the left or right, as on a lapel. For a male speaker, clipping the microphone onto his tie as close to the knot as possible works well. For a female speaker, use the same guideline for getting the microphone as high as possible. This helps minimize the change in sound level as the speaker's head is turned away to look at the screen. If a fixed podium microphone is also provided, it is usually best to turn the gain down on this unit after the speaker has been introduced and the traveling microphone has been attached. The reason for this is that when the speaker is standing at the podium with both microphones live, the resultant summation of the two signals may be constructive or destructive, depending on the frequency content of the voice signal and the spacing between the two microphones. The interference results in a comb-type filter effect with sharp nulls at certain frequencies and peaks at others. Under the best of circumstances, the change in sound level as the speaker turns his/her head away from and toward the podium microphone is distracting.

**Audience Microphones:** Either wired or wireless microphones seem to work well for picking up audience questions and comments in a large room. A wireless system has the advantage of being easily passed along a row of seats without the questioner having to exit the row and move to a fixed microphone in the aisle. If wired microphones are used with sufficient cable, they may be passed along a row also.

**Sound System Controls:** The controls for the sound system should be independent of the sound systems for adjoining rooms. There should be gain controls for each microphone used, including wireless units. There should be a master gain control for the system. This is used in an emergency to reduce the gain when acoustic feedback or other problems develop and it is not known where the source of difficulty is.

**Room Lighting Controls:** The controls for room lighting should be independent of the lighting controls in adjoining rooms. If there is not a master control for adjusting all lights in a room simultaneously, the controls for each room should at least be grouped at a central location in the room. If projectors of adequate wattage have been selected, it should not be necessary to turn the room lighting level all the way down during a talk illustrated with slides. It is preferable to have the room lights brought up before and after each talk and to turn the lighting down only enough to have a good high-contrast image on the screen, yet permit the audience to follow the talk in the conference proceedings and to take notes.

### **8.3 Sleeping Rooms**

A block of sleeping rooms must be booked in the conference headquarters hotel to accommodate out-of-town attendees. It is better to book more rooms than you think are needed and then cancel 30 to 45 days in advance (be certain the conference is not liable). Sometimes, it is advisable to book overflow rooms in a nearby hotel (or have an arrangement with the headquarters hotel for



overflow in the event of a larger-than-anticipated crowd). Normally, unreserved sleeping rooms are held until 30-45 days before the conference and then are released to the general public. Attendees attempting to reserve rooms after that date are handled on a first-come basis.

In a special category are members of the PELS Adcom, Meetings Committee, top IEEE officials and speakers and session chairs. The Arrangements Chair supplies a list of these people to the hotel so they can be placed on a VIP list to be assured upgraded accommodations.

Make an effort to get the cutoff date for releasing rooms as close to the conference date as possible. PESC attendees are notoriously late in reserving hotel rooms and mailing registration fees. It may be necessary to have the facility contact the site of the previous year's conference to underscore this circumstance. Verification of the probable late surge of reservations will avoid the unpleasant prospect of attendees being placed in overflow hotels or not receiving accommodations at all.

#### **8.4 Social Functions**

Social functions require the Arrangements Chair to schedule speakers' breakfasts, luncheons and receptions and pick the menus and deal with decorations, tickets to functions and give the hotel a guarantee of the number of meals to be served — try for a 24-hour notice but settle for no more than 48 hours (hotels make every effort to require a 72-hour advance notice but often will settle for 48 hours — very occasionally a 24-hour advance is possible). Guarantee on a conservative basis; the hotel prepares for 5 percent more than the guarantee. Remember, attendance drops after the first day and be aware some attendees skip meal functions altogether. There is no foolproof rule of thumb, although many meeting planners under guarantee by 10 percent the first day, 15 percent the second and third day and 25 percent the fourth.

## 9.0 REGISTRATION CHAIR

### 9.1 General Information

The Registration Chair receives all advance registrations, supervises at-the-door registrations, oversees the sale of banquet and meal tickets, additional copies of the Conference Record and any special packages such as spouses' tours (hotels, chamber of commerce and tourist bureaus can provide information on such packages). He maintains a detailed breakdown of funds.

It is critical that registration records show a proper breakdown of registrants and of transactions such as cash received and Proceedings sold. There is need to know how many attendees were students, how many were IEEE members (including membership numbers) and how many were PELS members, how many extra copies of the Proceedings were sold to members and to nonmembers (only one extra copy of the Proceedings may be sold to members at the discounted price, an additional reason for a list of these transactions).

Remember, the proceedings are intellectual property and any sale at the conference of printed or electronic versions should be at the same price.

Advance registration for PESC is encouraged through use of a reduced fee structure. IEEE membership is encouraged in the same manner. Most early registrants will be authors and/or regular attendees. Acknowledge registrations promptly with an e-mail or card confirming payment and the event. Include a phone and fax number and e-mail address in the confirmation so any later questions can be answered.



"PESC04 -  
Registration Informal

Prior to the beginning of the Conference, pre-registration packets should be assembled containing PESC materials — luncheon and banquet tickets, Conference Proceedings, name tag, next year's Call for Papers and local visitor information. The pre-registrant should not be delayed at the registration desk.

Name tags must be read easily by other attendees and should feature the individual's name and affiliation in LARGE LETTERS. There are a number of computer programs which provide this feature.

Registration includes admission to all technical sessions, one copy of the CD-ROM Conference Proceedings and tickets for conference-sponsored luncheons and banquets.

After securing badges, committee ribbons, badge stock and other elements of a registration package, the Registration Chair has badges prepared and assembled and banquet and luncheon tickets and packages them with the Proceedings, a conference program and perhaps a brochure from the facility or the local chamber of commerce. He also prepares packages for VIP guests.

The Registration Chairman arranges for registration forms, tickets, badges, inserts, spouses program printing and conference evaluation forms, if any.

The Registration Chair arranges for sufficient personnel to handle registration and makes certain they understand the requisite procedures before the deluge of registrants. He assures there are sufficient chairs and tables, signs and computers/printers and pens, registration cards and, on tutorial day, registration cards for tutorials.

Registration fees for IEEE members and those from participating sponsor organizations shall be established at a lower rate (usually 25 percent) than fees for non-members. The Conference Committee will determine if complimentary registrations are available for members of the committee, specific keynote and luncheon speakers and the chair of any sponsoring IEEE local section, provided their respective organizations do not offer such registration support. All others, including authors, speakers and session chairmen are required to pay full registration fees.

## **9.2 Registration Desk**

The registration desk should open at 5 p.m. the day before the conference (or the tutorials preceding the conference) and remain open until 8 p.m. Registration should open at 7 a.m. on all days of the conference and should remain open all day the first three days of the actual conference and until noon on the final day (the registration area also serves as an information center for the conference). The desk is manned by between two and four registration workers (it may be desirable to increase the number of people manning registration desks during the peak registration periods to move attendees through the process promptly), each with a personal computer for at-door registrations. A separate desk is maintained for pre-registrations where attendees pick up their prepared materials, including a Conference Proceedings.

Try to recruit registration help from organizations supporting the conference through representation on the Conference Committee. Temporary clerks may be needed. The local convention and visitors bureau can either provide them or recommend an appropriate agency.

The following persons should be engaged at the registration desk during peak periods:

- Two persons at the advance registration desk—
- One person to accept filled out application blanks and fees for at-door registrants.
- Two typists to prepare badge inserts (a computer-aided operation) and present badges and luncheon and banquet tickets to registrants.
- A cashier to make up individual cash boxes with adequate small bills and change for each registration clerk. The cashier checks the cash boxes in and out, assigns tickets to the appropriate clerk and keeps accurate, current financial records of each account.

## **9.3 Program Desk**

A spouses program desk should be maintained in the registration area to assist visitors in making in coordinating any conference-organized tours and activities or to make individual arrangements for persons wishing to go off by themselves or in an independent group.

## 9.4 Handling Funds

Arrange to turn over cash on a regular basis to the Finance Chair for deposit in a secure, safe place. It may be possible to arrange with a nearby bank to handle such funds even on a temporary basis — one suggestion is to use a Conference Committee member's bank where the individual may have some influence. The headquarters facility may extend the use of a safe to keep cash which is received after banks close.

The Registration Chair should be available at all times to answer questions and handle emergencies — thus should not himself be part of the actual registration procedure. Approval of the Registration Chair is required for issuance of complimentary passes for the working press which should be furnished upon presentation of credentials.

After the conference, the Registration Chair prepares a list of attendees and their specific addresses (including mail stations where appropriate).<sup>\*</sup> Copies are furnished to the Conference Chair for his final report, the Technical Program Chair and the PELS Executive Director for the Society mailing list. Provide complete records of all registrants their full addresses and their role in the conference.

*\*Insist that registration workers obtain **full** addresses, plus phone, fax and e-mail. If the information is not contained on the registration form, ASK FOR IT. Large companies have mail stations or departments and will not deliver mail unless this specific information is included Occasionally, someone will refuse to provide an e-mail address but overwhelmingly attendees will cooperate.*

## 10.0 FINANCE CHAIRMAN

### 10.1 General Information

The Finance Chair is the chief financial officer and controller charged with developing a system for safeguarding and accounting for all funds received prior to the conference from pre- registrations, tutorials and advances from the sponsor and for monies received during the conference from registration fees and ticket sales. He issues a quarterly financial report and is responsible for establishing and updating budgets and compiling a final financial accounting.

An advance loan will be needed to meet early conference expenses before registration funds become available. Advance funds are provided by the Power Electronics Society and, if there is one, a sponsoring local IEEE section or chapter. The Finance Chairman must request these funds through the Treasurer of PELS and the leadership of the host section. It is only upon the official request from the PELS Treasurer or President that IEEE will transfer Society funds to PESC as seed money. The Finance Chair should assess and, in consultation with the Conference Chair, make a loan request to the Meetings Committee well in advance of a scheduled PELS AdCom-Meetings Committee meeting (AdCom meetings take place in late February, June and October each year). Advance funding should be returned to the sponsor as soon after the conference as possible.

The Finance Chair will develop a budget (see Budget) to indicate all anticipated receipts and expenditures (to be approved by the Conference Committee) and will provide that budget to the sponsor. The budget must be approved by the PELS Meetings Committee and the PELS AdCom and any local sponsoring IEEE Section and then submitted to IEEE Conference Services for final acceptance. Budgets will be updated and submitted to the Meetings Committee and AdCom twice each year. The Conference will plan to have a surplus of at least 15 percent of income. Definite fees are determined by the Conference committee which specifies lower fees for IEEE members and for members of other societies participating in the program and for advance registration. Acceptance of purchase orders should be discouraged. Policies should be set early to avoid later embarrassment.

The Finance Chair should follow a chart of accounts consistent with past conferences (Attachment 8). Many simple computer programs (e.g., Quicken) are available to manage the conference financial affairs and to provide reports.



"Universal Chart of  
Accounts.xls"

### 10.2 Bank Account

The Finance Chair will establish the conference bank account — the account will be in the name of "IEEE PESC," not an individual - to handle funds received and to disburse payments (it will be

closed when the final financial summary is made and any surplus payments have cleared the account). The Finance Chair should open the bank account with the advance loan requested from and provided by IEEE. The signature card should permit signing by the Conference Chair and Finance Chair. A second card should be sent to the PELS Executive Director who will forward it to IEEE Conference Services for the signature of an IEEE Executive, as required. The completed card will be returned to the Finance Chair.

The Finance Chair, the Conference Chair and an executive from IEEE Headquarters are empowered to sign checks — normally, amounts under \$1,000 will be signed by the Finance Chair alone. Checks over that amount will be signed by the Finance Chair and Conference Chair. The Conference Chair and IEEE executive should sign checks alone only in an emergency. . Some banks may not accept a signature if an individual is not present in the bank. In such instances, notify the Executive Director.

All financial records should carry the Uniform Employer Identification Number assigned to IEEE conferences by the IRS – 13-1656633.

### **10.3 Insurance**

The Finance Chair is responsible for insurance coverage (available through IEEE headquarters) for the conference to protect PESC and its sponsors from accident claims or losses. A request for conference insurance form must be filed with IEEE to obtain the following coverage free of charge:

- Bonding of conference officers and employees - \$100,00 (\$2,500 deductible)
- Rental of equipment - \$25,000 limit (\$250 deductible)
- Liability and property damage - \$1,000,000 and \$7,000,000 (no deductible)
- Limited volunteer personal liability - \$100,000 (list committee members covered)

In-and-out robbery coverage - \$25,000 limit and \$2,500 deductible) — is available through IEEE at a cost of \$125. But it is generally not needed unless exhibits are involved.

If buses or other vehicles are chartered in connection with a conference activity, the IEEE requires that the transportation company cover IEEE as an additional insured. This is a routine matter; the transporter's insurance representative merely issues a form with IEEE shown as insured for the function.

### **10.4 Payment of Bills**

Bills should be approved by authorized committee chairmen and forwarded to the Finance Chair for payment. While every effort must be made to stay within the budget, the Finance Chair may pay any bill authorized by the appropriate chair which does not exceed a committee's specific budget by more than 10 percent (larger excesses must be approved by the Conference Chair).

The Internal Revenue Service requires that a Form 1099 must be issued to any individual or unincorporated entity which receives fees, payments or salary totaling more than \$600 in a single calendar year. This includes awards presented at or by the Conference.

## **10.5 Refunds**

The Finance Chair, Conference Chair and Registration Chair will recommend a policy for refunds (but only after a check clears the bank) for approval by the Conference Committee. Refunds can be held to a minimum if a cut-off date for refund requests is publicized in the advance program and other promotional literature. Requests for refunds after the deadline date will not be honored.

A preliminary financial report shall be filed within three months and a final audited report shall be submitted to the Meetings Committee, PELS AdCom, any other financial sponsor and IEEE headquarters. If revenues or expenses total between \$100,000 and \$250,000, the sponsor(s) may select representatives or an independent auditor to audit Conference financial records prior to issuance of a final report. If revenues or expenses exceed \$250,000, an independent professional auditor must review the records. The final report shall give a clear picture of the number of registrants, the fees they paid, the number of tickets sold for social events and detailed information about expenditures.

## **10.6 Audit**

IEEE policy stipulates that a conference with total revenues or expenses exceeding \$100,000 must undergo a financial audit. It is recommended that the audit be conducted by an independent, professor accountant or by the auditing department of IEEE. The Conference Committee may make specific requests of the audit committee in addition to its primary role centered on financial controls and programs in the areas of income, expenses, registration and procedures.

## **11.0 PUBLICITY CHAIRMAN**

### **11.1 General Information**

The Publicity Chair works through national and local media, the conference and PELS web sites and direct mail to publicize the conference and promote maximum attendance. The technical program gets the emphasis in publicity directed toward engineering technical publications and other trade journals (sometimes a speaker will be emphasized in special publicity to attract newspapers and broadcast media). The Publicity Chair makes certain a news release and a call for papers go to the web sites and electronics trade journals, the PELS Society newsletter and local (and nearby) section newsletters. A calendar item also should be included. As soon as the conference is scheduled, a notice should go to IEEE TAG for inclusion in the next edition.

The PELS Newsletter is an excellent outlet for PESC information. In the technical press, there are IEEE Spectrum and many others including Electronic News, Electronic Engineering Times, EDN, Electronic Design and newsletters of other IEEE societies with fields of interest that include activities associated with power electronics.

General newspapers most likely will pay only scant attention to a technical conference. Don't ignore local news media — send each a press kit containing announcements, advance programs and registration materials — but don't expect to see reporters and cameras unless a "sideshow" or "gimmick" is offered or there is a newsworthy, prominent speaker. Material should reach trade journals two to three months prior to the event — an initial announcement and call for papers should go to the media as soon as they are mailed to potential speakers.

### **11.2 Mailing Lists**

The Publicity Chair determines which special mailing lists or other means will achieve local and spot publicity, as desired by the conference. Mailing lists, not already available from other sources, will be compiled. Materials should go to those who have attended previous conferences and whose TIP preferences list power electronics among the first two fields of interest.

A post conference news release with photos of one or more highlights of the conference should be placed on the PESC web site and mailed to trade journals (including the PELS newsletter and local section newsletters). The material should be included in the Chairman's final report.

### **11.3 Attendance Promotion**

The Publicity Chairman develops lists of Society members, attendees at previous conferences and related conferences and persons who have inquired about PESC. To these lists will be mailed calls for papers, advance programs and other developed items. In addition, this material should be posted on the PESC web site. The Chairman should recruit interested IEEE members in key industry centers as local information sources to pass out calls for papers and programs to co-workers and to remind persons in related fields to register and attend.



## **13.0 GUESTS (OR COMPANION) CHAIR**

### **13.1 Spouse Activities**

Spouses or companions accompanying attendees to PESC may create need for a daytime social program. Programs for spouses should be made well enough in advance so appropriate notices may be included in the advance program and other announcements — assure that spouses program registration space is included on the conference registration form. The Conference Committee will determine what registration fee will be charged. The objective is for tours and spouse activities to be self-sufficient.

The Spouses Chair will develop two or three definite activities and organize them as a formal adjunct of the Conference (the host hotel, chamber of commerce or tourist bureau can assist in developing a program). Activities should be day-long affairs, often involving visits to area attractions or a specific event -- theater, river cruise, etc. Lunch must be included. It is advisable that at least a portion of one day be devoted to a shopping tour.

### **13.2 Spouse Hospitality**

Normally a guests room or lounge is maintained as a headquarters site offering morning coffee and perhaps a continental breakfast prior to a day's organized activities.

## **14.0 PELS EXECUTIVE DIRECTOR**

### **14.1 Duties**

The PELS Executive Director works with all committees in helping carry out their responsibilities. Although he reports to the Conference Chair, he is available to all members of the Conference Committee as needed. His office handles routine administrative matters pertaining to ongoing PESC activities and to provide continuity to the institution of PESC. His is the permanent office of the conference. All proposals to host future conferences are addressed to that office.

### **14.2 Conference Executive Activities**

- Operates with full consultation and input from the Conference Chair and committee. He is available to all committee members for advice and consent. All normal administrative functions are available through his office.
- Maintains capability to handle e-mail, mail and telephone inquiries and provide registration and exhibiting material. He can collect abstracts and summaries and papers for Conference Proceedings. The office operates during all normal business hours and while it does not relieve chairs and committees of their responsibilities, it frees them from routine operations and allows them to concentrate on executive planning and implementation.
- Available to coordinate activities of committee members, including monitoring of action calendar and followup to assure required action takes place (prepared to follow through if responsible person is not available or is unable to perform).
- Attends key meetings of conference committees as requested by the Conference chair; prepares and distributes meeting notices and minutes as committee chairman designates.
- Works with appropriate chair to help design, write – or review - and produce conference materials including call for papers, advance and at-conference programs. He can prepare "front-of-book" section for the Proceedings and coordinate collection of papers and pagination, collect advance registration forms and handle routine correspondence chairs.
- Aids publicity chair in preparing news releases and calendar announcements and works, when requested, with the printer in the preparation of the Conference Proceedings.
- Available to join the negotiating team regarding hotel arrangements, security services, all physical functions of the conference, and to monitor compliance with agreements.
- Acts as liaison between the conference and IEEE Headquarters, coordinating collection of seed money and distribution of surplus, plus filing of required forms and documents..
- Operates as a conference resource with access to existing files on previous PESC's.