Conference Coordination Subcommittee

How to organize...

Peter Nagy,
Region 8 meeting, March 2019 Valletta, Malta
Overview

- Basics (3x7 slides)
- For veterans (3x5 slides)
- R8 Flagship conference bidding teams (3x4 slides)
- IEEE Resources to use (3x2 slides)

Ljupco Karadzinov (North Macedonia) Chair
Peter Nagy (Hungary) Past Chair
Tomišlav Capuder (Croatia) Member
Khaled Mokhtar (United Arab Emirates) Member
Vikass Monebhurrun (France) Corresponding Member
BASICS
Agenda

- Steps in Starting a Conference
- Sponsorship Overview
- Technical Co-Sponsorship fee
- Obtaining IEEE Approval-IEEE Conference Application
  - Timeline
  - Conference Operations Review
  - MoU
  - Conference Approval
- IEEE Region 8 Conference Practices
Beginning Stages: Conference Creation
Starting a conference….it begins with an idea!

New research to share

Develop target market and scale event - Local, Regional, Global

Committee development considerations: size, geography, balanced representation, # reviewers, skill of reviewers. Overall adequate resources?

Budgeting helps understand how many sponsors you may require

**Sponsor evaluation – IEEE Organization Unit - OU, Non-IEEE Organizations**

Market analysis, best time to host, look to avoid competing conferences

Conference size: Determine need for ADCOM / Steering Committees
IEEE Sponsorship Types

› Sole Sponsorship
  - The IEEE OU* has full financial and technical responsibility for executing the conference

› Co-Sponsorship
  - The IEEE OU has shared responsibilities for the conference’s financial and technical requirements

› Technical Co-sponsorship
  - The IEEE OU provides direct and substantial involvement in the technical program

*OU – Organizational Unit (example: society, section, chapter, council)
Sole sponsorship indicates full and sole organizational unit involvement in a conference

- Define the conference scope and execute a high quality technical program.
- Develop and manage a budget that produces a positive surplus (20% goal)
  - OU will receive 100% of surplus or be responsible for deficit
- Ensure appropriate representation of the IEEE brand is included on all communications, websites and marketing materials.
- Coordinate resource management and full administration of conf.
- Escalate any legal issues to IEEE Conference Business Services
- Obtain approval of conference from IEEE
Co-sponsorship indicates shared involvement among several organizations, one of which is an IEEE OU

- The IEEE OU financial responsibility is shared based on an agreed upon percentage

- Financial Example: IEEE OU 70% and Co-sponsor has 30%
  - A surplus or deficit is divided based on this percentage
  - Financial management is typically managed by the majority owner

- Conference execution responsibilities are shared: venue selection, negotiating services, exhibit management, publication of programs and proceedings, marketing and pr

- A Memorandum of Understanding (MOU) is required. It defines the responsibilities of each party
Technical Co-Sponsorship indicates direct and substantial involvement by the IEEE OU solely in the organization of the technical program.

- The IEEE OU has direct and substantial involvement in the technical program and scope definition.
- Technical program involvement examples: IEEE volunteer is technical program chair or track chair, assigning reviewers to conference.
- The conference is allowed to use IEEE’s brand. IEEE brand guidelines must followed. All conference promotional materials indicate IEEE as a Technical Co-sponsor.
IEEE OU has no financial responsibility. The OU does not receive any financial gain or incur any loss.

- Conference proceedings may be eligible for inclusion to IEEE Xplore. Proceedings are subject to quality review.

- Conference execution is completely managed by co-sponsor/s.

- A Memorandum of Understanding (MOU) is required.
Technical Co-Sponsorship fee

- Applies to any technically co sponsored conference in which there is no (0%) IEEE financial interest
- IEEE Geographic Units (GeoUnits) who technically co conference will be charged a fee
- The fee is $1,000 per conference, plus $15 per paper sent to IEEE Xplore®


https://ieee-elearning.org/CLE/course/view.php?id=293

- How to avoid: Financial involvement, National Society
Conference Supporters

- For-profit companies can not sponsor an IEEE conference

- For-profit companies can be supporters of an IEEE conference
  - Supporter, Patron, Partner or Contributor are acceptable designations.

- Supporters can contribute or donate goods and services to a conference. Involvement examples:
  - Support can be in the form of a grant for a specific activity, such as a dinner.
  - Providing conference attendees trinkets or small gifts.
  - A university may donate facilities to host a conference.

- Supporters should be noted separately from sponsors on all conference marketing materials including the conference web site. They are distinguished from IEEE official sponsors.
MGA Conference Sponsorship Review Process

- MGA Organizational Units that intend to partner with a non-IEEE entity on a conference must obtain approval
  - Applies to all co-sponsored conferences
    - Financial
    - Technical

- **Section Level** approval needed when the following OUs partner with a non-IEEE entity:
  - IEEE Subsections
  - Chapters
  - Affinity Groups
  - Student Branches etc.

- **Region Level** approval needed when the following OUs partner with a non-IEEE entity:
  - Geographic Councils
Conference Application
Benefits of Registering Your Conference
Approved Conference Eligibility

- Ability to utilize the IEEE brand to promote your conference
- Your conference is included in both the IEEE Conference Search and IEEE Call for Papers Search
- Eligible for participation in the IEEE Conference Publication Program
- Insurance Liability coverage
  - Financially sponsored conferences only
- Access to valuable no-cost organizer services
  - eNotices (R8 requires any Co-sponsorship)
  - PDF eXpress/PDF eXpress PLUS
Conference Application Process
ICX

IEEE Conference Exchange (ICX) is the IEEE conference management platform

IEEE launched ICX in 2012 with the introduction of the IEEE Conference Application, with integrated Memorandum of Understanding (MOU) development

Conference Publication Form is integrated into ICX, along with eCopyright and PDF eXpress

IEEE Conference Application – online form
https://www.ieee.org/conferences/organizers/conf-app.html

Conference Application Checklist (pdf file)
https://www.ieee.org/content/dam/ieee-org/ieee/web/org/conferences/icx_required_information_checklist.pdf
Basic Information Needed to Submit an Application

Before submitting an application, the following information should be known:
- Conference Title
- Acronym (if available)
- Dates & Location
- Estimated budget
- Copyright Owner
- Information about the Technical Program
- Contact information for Committee Chairs & List of committee names (if available)
- IEEE & Non-IEEE Sponsorship (technical or financial)

Timing: Typically 12-18 months prior to the conference start date

https://www.ieee.org/content/dam/ieee-org/ieee/web/org/conferences/high_level_conference_timeline.pdf

Please be sure to reach agreement on conference sponsorship and be in contact with all entities (IEEE and non-IEEE) before you submit the IEEE Conference Application.
Getting Started
Conference Timeline

ICX
Enter Conference Information

Conference Operations
Application Review

Conference Services
MoU Validated

OU Approval
Approval Sent
Conference Operations

Conference Operations
Approves Conference

Conference Entered
IEEE Conference Search
Memorandum of Understanding (MoU)
Why MoUs?

- A good business practice
  - Protects the interest of all participants

- Policy 10 requires a Memorandum of Understanding (MoU) be established before IEEE approval of a conference can be granted
  - All co-sponsored activities (solely sponsored=exempt)
  - IEEE / Non-IEEE
  - Financial / Technical

https://www.ieee.org/conferences/organizers/memorandum-of-understanding.html
What Information is Needed?

- Conference Name, Location and Dates
- List all sponsoring organizations
  - Financial sponsors (IEEE and Non-IEEE)
    - Specify the share of each: %
  - IEEE Technical co-sponsors
    - Describe the OU role in developing and executing the technical program
- If the conference will publish with IEEE
  - Who owns IP copyright
- Who owns the conference name
MoUs and process

MoUs are developed within the conference application process, based on the data already submitted:

- Event characteristics
- Sponsor type

Electronic distribution, review and approval process
IEEE Region 8
Conference Practices
IEEE R8 CoCSC prepared a handbook for conference organizers, explaining

- Types of sponsorship
- Benefits
- IEEE Xplore publishing policy
- Requirements and fees
- Guidelines for conference organization

Download at R8 CoCSC homepage:
http://www.ieeer8.org/technical-activities/conference-coordination/
IEEE R8 flagship conferences are:

- EUROCON 2019, 1-4 July 2019, Novi Sad, **Serbia**, eurocon2019.org
- HISTELCON 2019, 18-19 September, Glasgow, **UK**, histelcon2019.org
- MELECON 2020, 16-18 June, 2020, Palermo, **Italy**
- ENERGYCON 2020, 13-16 April 2020, Gammarth, **Tunisia**

Flagship conferences are always financially co-sponsored, usually 75% the local section, 25% R8.

To apply, please fill in bid presentation template and budget template (available on R8 CoCSC homepage)
FOR VETERANS
Beginning Stages: Conference Creation
Starting a conference....it begins with an idea!

See slide No5.
Benefits of Registering Your Conference
Approved Conference Eligibility

See slide No15.
Conference Publications
Providing nearly one third of the world’s current literature in electrical engineering, communications and computer science, IEEE Xplore delivers the most vital information in technology today.

The IEEE Xplore digital library provides web access to scientific and technical publications, including conference proceedings, produced by IEEE and its publishing partners. Proceedings must meet IEEE quality standards and be correctly formatted before being accepted into IEEE Xplore.

Approximately 25,000 new documents are added to IEEE Xplore each month.

IEEE Xplore is cited three times more often than any other publisher in new patents.

Source: 1790 Analytics, LLC. Copyright 2013
Publishing Conference Papers

- The IEEE Conference Publication Program handles distribution of conference publications for IEEE.

- Conferences must apply separately to participate in the IEEE Conference Publication Program – at least 6 months prior to conference dates.

- IEEE sponsorship, of any kind, does not guarantee that papers accepted for presentation at the conference will be eligible for publication in the IEEE Xplore Digital Library.

- Consider the Conference’s Non-presented paper policy.

- No paper or proceedings is guaranteed to be indexed.

https://www.ieee.org/conferences/organizers/publishing-conference-papers.html
Publishing Conference Papers
Four Basic Steps

Step 1: Submit your completed IEEE Conference Publication Form to Conference Operations - 6 months in advance of conference
- http://www.ieee.org/conferences_events/conferences/organizers/conf_app.html?appName=Publication

Step 2: Upon acceptance, Conference Operations will send a Letter of Acquisition (LOA)
- Complete the LOA and electronically approve the LOA

Step 3: Collect and submit copyright forms for the papers in the proceedings

Step 4: Prepare conference content for the Xplore Digital Library (following the Xplore guidelines) and submit proceedings to Conference Operations within 30 Days of completion.
IEEE Publishing Tools
Free Services

Electronic Copyright form (eCF)
- The eCF is an online version of the IEEE Copyright Form.
  https://www.ieee.org/publications/rights/copyright-main.html

PDF eXpress and PDF eXpress Plus, IEEE-financed author tools that assist IEEE conference organizers in obtaining IEEE Xplore®-compatible PDFs from their authors, are online.
Converts non-PDF source documents (typically, a Microsoft Word document or LaTeX bundle) into a PDF that meets IEEE Xplore® requirements
- https://www.ieee.org/conferences/publishing/pdfexpress.html

CrossCheck
compares submitted manuscripts against a very large database of published technical papers (as well as over 6 billion web pages), and provides editors with a summary report that highlights the similarity to previously published work.
Meetings Conferences & Events (MCE)
Conference Organizers - “We are here to support you.”

- MCE has vast experience that you can leverage at any time while planning your conference.
- MCE can act in a consultative manner or provide services.
- MCE has a single point of contact:
  - MCE Customer Relationship Management Team
    ieee-crm@ieee.org
How Can MCE Assist You?

- Overall guidance
- Organiser/OU education and training
- Identifying and facilitating sponsorship
- Finance, budgeting, insurance, contract review and approval
- Memorandums of Understanding (MOUs)
- Publication of your proceedings
- Marketing your conference
- Site location, event management, meeting logistics
- Contract negotiations, food & beverage planning, supplier management
Region 8 Conference Support Pilot Program

- **A six-month trial** designed to provide enhanced support to Region 8 conference organizers and MGA leadership

- **Melinda Stembridge, Customer Relations & Operations Administrator** will provide dedicated support to **Region 8**, as well as continue to support all India-sponsored conferences.

- She provides **oversight and support**, and serves as the primary point-of-contact for Region 8 conference activities including: conference sponsorship, the IEEE Conference Application, finance, contracts, publications, copyright, conference quality, conference activity data, general inquiries.

- **Hours of support:** 9am-5pm GMT

- **Contact details:** Please direct all questions, concerns, and feedback to Melinda at: **E**: ieee-mce@ieee.org  **P**: +1.732.562.3974
IEEE R8 CoCSC prepared a handbook for conference organizers, explaining

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Download at R8 CoCSC homepage:
http://www.ieeer8.org/technical-activities/conference-coordination/
R8 Flagship Conference bidding teams
Overview – Future Conferences

- YOU organized more IEEE sponsored conferences and YOU intend to host a flagship conference in the coming years.
  (Eurocon 2021, Africon 2021, Energycon 2022, Melecon2022 or Histelcon)

- main points of this session:
  - Requirements and expectations
  - Timelines and deadlines
  - Preparing a great bid
Required knowledge

- IEEE Organization Unit(s)
- IEEE Region 8 structure
- Flagship conferences
- Financial-, Technical Sponsorship
- Memorandum of Understanding with IEEE
History

AFRICON
- 2019: Accra, Ghana
- 2017: Cape Town, South Africa
- 2015: Addis Ababa, Ethiopia
- 2013: Mauritius

ENERGYCON
- 2018: Limassol, Cyprus
- 2016: Leuven, Belgium
- 2014: Dubrovnik, Croatia
- 2012: Florence, Italy

EUROCON
- 2019: Novi Sad, Serbia
- 2017: Ohrid, Macedonia
- 2015: Salamanca, Spain
- 2013: Zagreb, Croatia

HISTELCON
- 2019: Glasgow, Scotland, UK
- 2017: Kobe, Japan
- 2015: Tel Aviv, Israel
- 2012: Pavia, Italy

MELECON
- 2018: Marrakesh, Morocco
- 2016: Limassol, Cyprus
- 2014: Beirut, Lebanon
- 2012: Yasmine Hammamet, Tunisia
- 2010: Valletta, Malta

More information:
http://www.ieeer8.org/uncategorized/ieee-region-8-related-conferences/
Benefits

What else are we considering for the decision?

- Local IEEE (members’) benefits? (membership increase, competence, experience)
- For academia (research cooperation, lower expense for a paper, ability to show regional scientific results)
- Industry (visibility, IEEE involvement)
- Young professionals (YP session, universities, volunteers, organizing committee)
- Financial surplus (loss?)
Requirements and expectations

A detailed presentation

- Brief information on the hosting country (list of restrictions)
- Venue and possible backup
- Reach the venue
- Technical topics
- Proposed organizing committee
- Industrial support and participation
- List of IEEE membership engagement opportunities
- Other useful information
Requirements and expectations

Detailed budget

- Includes all envisaged sponsorships (industrial, governmental, academia, etc)
- Includes all envisaged expenses
- Insurance costs
- Gives an indication of the surplus (at least 20%)

Important to keep the registration fees for IEEE members low

Key Region 8 conferences should try and solicit a large number of sponsors enabling for reduced registration costs.
Timelines and deadlines

https://www.ieee.org/content/dam/ieee-org/ieee/web/org/conferences/high_level_conference_timeline_timeline.pdf
Timelines and deadlines (ideal world)

- C-24: decide to organize, read through the online training materials, Conference Application Form
- C-18: Conference Publication Form, communications plan, website, patronage
- C-12: Call for Paper, submit conference budget, deadlines, visa
- C-9: paper management, publicity!
- C-4: registration, final notification, proceedings
- C+3: financial report, lessons learned
Training materials at CoCSC website

- Conference Basics
- Conference Initiation
- Conference Finances
- Conference Publications
- Contingency Planning for Conferences
- Post_Conference_Reporting (PDF, 98KB)
- Handling_Indirect_Tax_and_Insurance_for_IEEE_Conferences

http://www.ieeer8.org/category/technical-activities/conference-coordination/
Guidelines and Templates

- Guidelines and Procedure for Bidding to host IEEE Region 8 Flagship Conferences
- Budget Template
- Bid Presentation Template
- Conference organizer’s handbook

http://www.ieeer8.org/category/technical-activities/conference-coordination/
Preparing a great bid – should include

- Geographical location (region, city, reach from airport, cheap airlines?, travel by train?)
- Venue (hotel, academic institute, location within city, room requirement, F&B)
- Technical Content (topics, local specialties)
- Co-located events (innovation day, student contest, industry exhibition)
- Budget (registration income, exhibition, patrons, venue, F&B, promotion, VAT, special taxation rules, predicted surplus)
Publicity – motivation behind...

- Writing papers
- Attending because of the content
- Keynotes, executive panels, companies
- Exhibition as attraction

Tools

- E-mail blasts, online communications, distributing the CfP, eNotice, direct e-mail
- Press, Stakeholders’ dinner, Advertising
Keep the cycle alive!

Great (organizing) team

Plan, Do, Action (and be “documented”)

Previous years’ experience

Lessons learned

Information sharing tool...
IEEE resources to use
CLE website offers a “one stop” training solution, a simpler and effective learning experience. [https://ieee-elearning.org/CLE/](https://ieee-elearning.org/CLE/)

Courses [https://ieee-elearning.org/CLE/totara/coursecatalog/courses.php](https://ieee-elearning.org/CLE/totara/coursecatalog/courses.php)

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<th>Course Name</th>
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<td>PLAYBACK - General Data Protection Regulation (GDPR) for Events</td>
<td>30 Jan 2019</td>
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<td>Senior Member Elevation</td>
<td>27 Dec 2018</td>
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<tr>
<td>Industry Liaison Training</td>
<td>27 Dec 2018</td>
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<tr>
<td>Top VoLT Projects</td>
<td>20 Dec 2018</td>
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For specific roles, eg. Section Chair, Section Vice-Chair, Student Branch Chair, Treasurer

Conference Education Programs: Publications Chair, TPC Chair, Conference Chair, Treasurer, Event Management
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..about conference organizing practices, new services and tools available, IEEE policy changes.

In the March news: Top Legal Tips for IEEE Conference Organizers, Planner Tips: Managing Common Food Restrictions, Be Aware: Protect IEEE from Business Emails Scams, Electronic Copyright Form (eCF) and Packing List Updates, Alert: Services Disruption - 14 March, Conference Education Updates

More information here: https://www.ieee.org/conferences/organizers/organizers-newsletter.html
## Resources for Conference Organizers and Volunteers

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We are here to provide support...

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