



Session for possible future flagship conference organizers

What-When-How

Conference Coordination Subcommittee, Adel, Jan, Péter

Overview – Future Conferences

- ▶ YOU organized more IEEE sponsored conferences and YOU intend to host a flagship conference in the coming years.
(Histelcon 2017, Africon 2017, Eurocon 2017, Energycon 2018, Melecon2018)
- ▶ main points of this session:
 - Requirements and expectations
 - Timelines and deadlines
 - Preparing a great bid

Required knowledge

- ▶ IEEE Organization Unit
- ▶ IEEE Region 8 structure
- ▶ Flagship conferences
- ▶ Financial-, Technical Sponsorship
- ▶ Memorandum of Understanding with IEEE

History

AFRICON

- › 2015: [Addis Ababa, Ethiopia](#)
- › 2013: [Mauritius](#)
- › 2011: [Livingstone, Zambia](#)
- › 2009: [Nairobi, Kenya](#)

ENERGYCON

- › 2016: [Leuven, Belgium](#)
- › 2014: [Dubrovnik, Croatia](#)
- › 2012: [Florence, Italy](#)
- › 2010: [Manama, Bahrain](#)

EUROCON

- › 2015: [Salamanca, Spain](#)
- › 2013: [Zagreb, Croatia](#)
- › 2011: [Lisbon, Portugal](#)
- › 2009: [Saint-Petersburg, Russia](#)

HISTELCON

- › 2015: [Tel Aviv, Israel](#)
- › 2012: [Pavia, Italy](#)
- › 2010: [Madrid, Spain](#)
- › 2008: [Paris, France](#)

MELECON

- › 2016: [Limassol, Cyprus](#)
- › 2014: [Beirut, Lebanon](#)
- › 2012: [Yasmine Hammamet, Tunisia](#)
- › 2010: [Valletta, Malta](#)
- › 2008: [Ajaccio, France](#)

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)

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

Determine and apply for sponsorship from all applicable IEEE and/or non-IEEE organizational units (OU)	Obtain Sponsorship	Register your conference submit Conference Application and approve MOU	Contact IEEE Section where conference will be held.	Develop communications plan, marketing materials and conference website	Develop paper management process or identify system vendor	Develop technical program, establish paper submission process and deadlines	Create website for paper submissions. Work with paper management company, if applicable	Plan social activities and tour program, if applicable	Complete paper review process. Finalize technical program. Notify speakers	Request weekly reports from hotels on room block	Review room block with hotel against attendance and contracts	Deadline for early registration	Confirm onsite logistics with venue	Onsite Registration	Submit Conference Proceedings/Content (Xplore CD and other media types) per LOA			Distribute surplus	Prepare and submit all audit material to independent auditor. Audit required for IEEE OU total is >50% and budgeted income or expenses > US\$250K
	Engage with IEEE MCE for conference education, guidance services and tools.	Submit conference committee list and initial budget forecast to Conference Business Operations	Submit Conference Publication Form to obtain Letter of Acquisition (LOA), if publishing with IEEE	Send request for proposal (RFP) to exhibit decorators and develop exhibitor prospectus, if applicable	Establish a Call For Papers (CFP)	Update conference website with page/link about CFP information	Obtain permission from related IEEE OUs to market to their members using e-Notice	Send out RFPs for ground transportation and finalize contract, if applicable	Create and post advance program on conference website	Order attendee giveaways, speaker gifts, and/or conference shirts	Send final program, advertising, publicity and registration reminders	Preliminary specifications to conference site. Order signage and recognition products	Set-up registration area, exhibit space, information booth, office area	Monitor Budget	Committee members submit final statistics and lessons learned to OU	Registration clean up: process refunds, receipts and balances due	Process outstanding bills	Close conference bank account; submit proof of account closure	
	Contact IEEE Meetings, Conferences & Events (MCE) if you would like to be assigned a Conference Manager	Review IEEE Insurance coverage and determine if additional coverage is required	Register for Electronic IEEE Copyright Form (eCF) if proceedings are acquired by IEEE	Begin outreach to educational institutions, corporations, government and industry for support and patronage	Establish a Visa process for international attendees and post on the conference website	Meet with previous year's committee to discuss best practices	Establish registration process and ensure registration service is Payment Card Industry (PCI) compliant	Launch registration site	Determine preliminary exhibitor space assignments, if applicable	Solicit bids from proceedings production vendors based on accepted papers	Develop and finalize volunteer job functions and onsite needs.	Submit Pre-Conference budget forecast		Monitor Daily Activities	Repay all Loans	Submit final financial report with Certification of Accuracy			
	Review tax information to ensure IRS and international compliance VAT and GST	Register for PDF eXpress (optional)	Apply for grants for conference support	Submit conference budget with written IEEE OU approval(s) for headquarter review	Establish conference bank account(s)				Organize and prepare for production of conference publications per Letter of Acquisition (LOA)	Complete paper review process. Finalize technical program. Notify speakers.	Ship final program to conference site		Hold Post-Conference Wrap Up Meeting	Submit Post-Conference forecast					
	Contract conference management company, if applicable	Site selection and contract review, if applicable		Submit Principles of Business Conduct Certificate and Conflict of Interest Disclosure Statement (POBC/COI) forms	Submit updated committee list														
IEEE MCE Customer Relations & Operations (Email: Single Point of Contact) Email: ieee-mce@ieee.org																			
Request and obtain loan from OU, if needed																			
Initial, Pre- and Post Conference forecasts [Submit Pre- and Post- Conference forecasts by November 30th of each calendar year for accrual purposes.] 1099 & 1042 Schedule of Payments [No later than January 10th of each year for all payments made in the previous calendar year.]																			
Submit annual report on foreign bank accounts to IEEE Tax Dept. [No later than January 10th of each year for all payments made in the previous calendar year.]																			
Secure W-8 and/or W-9 forms for tax reporting																			
Promote CFP and	Review and	powered by																	Financial Actions Technical Program Actions Conference Publication Actions

Timelines and deadlines

- ▶ 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 CoCS 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/](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](#)

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conference-coordination/](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

Project management

- ▶ Keep the cycle alive!
- ▶ Great (organizing) team
- ▶ Plan, Do, Action (and be “documented”)
- ▶ Previous years’ experience
- ▶ Lessons learned
- ▶ Information sharing tool...

Contacts

- ▶ Adel Alimi, adel.alimi@ieee.org
- ▶ Jan Haase, janhaase@ieee.org
- ▶ Peter Nagy, nagy.peter@ieee.org