Understanding MGA Technical Co-Sponsorship (TCS) Costs

**Presenter:** Francesca Mingione, Conference & Event Project Manager

**Q & A:** Francesca Mingione, Lukrecija Lelong, MCE Customer Relationship Manager, Christian DeFelice, Manager - Business Reporting and Analysis

*2018 February 28th*
AGENDA

- Audiences Impacted
- Member and Geographic Activities (MGA) Change to Technical Co-Sponsorship (TCS) Cost Allocation - Overview
- Cost Example
- Decision Making
- Billing Process
- Support from MGA and Meetings, Conferences & Events (MCE)
Technical Co-Sponsorship (TCS) Allocation

Overview
Technical Co-Sponsor (TCS) Conference Fee Overview

MGA TCS Allocation – Effective date: 1 January 2018

Approved Motion

▸ For any technically co-sponsored conference in which there is no (0%) IEEE financial interest the MGA co-sponsor shall arrange (via an approved MoU) for recovery of IEEE operation costs in the form of TCS fees.

▸ Effective for conferences for which the creation of the MoU starts after 1 January 2018, the fees are $1000 per event plus $15 for each paper that is optionally published in Xplore. As an exception to this general policy, MGA will continue to pay those fees if the external (non-IEEE) financial sponsor has a National Society Agreement with IEEE or has a Sister Society Agreement with one or more of the IEEE Societies.

▸ MGA absorbed TCS fees on behalf of GeoUnits from 1 January 2016 through 31 December 2017
Technical Co-Sponsor (TCS)

Conference Fee Overview

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

- **EXAMPLE – Conference Proceedings**
  - 100 papers X $15 = $1,500
  - $1,000 per conference
  - Total Cost = $2,500
Technical Co-Sponsor (TCS)

Conference Fee Overview

- Multiple sponsoring IEEE OUs - the TCS co-sponsorship charge is divided equally

- IEEE will bill the GeoUnit or Conference based on the terms agreed upon during onboarding process

- Other fees charged by GeoUnits are at their discretion and not affected by this policy change
Making a Decision on Allocating TCS Fees

- You will have the option to decide how to charge the fee on a conference by conference basis
- Choices on how to allocate this fee
  - You may charge your Geo Unit for all fees
  - You may charge the conference for all fees
  - You may decide on an allocation model which splits the fee among the Geo Unit and conference
- Who in your GeoUnit (the Sponsor) will make the decision on how to allocate the fee?
Communication Plan
Communications on Allocating TCS Fees

Two Levels of Communication

1) MGA & MCE Plan

- MGA & MCE will be communicating the new policy to GeoUnit & Region Leadership via various outlets throughout 2018
  - Examples: MGA Scoop, IEEE.org, IEEE Conference Organizers’ Newsletter, Webinars
Audiences Impacted by Policy Change

Spread the Word - Audiences We Need to Communicate With

2) GeoUnit Communications within the OU

- Communicate these changes immediately, it will assist organizers with conference budget planning and processing your conference application
  - Considerations – who is responsible for ongoing TCS processing (identify who receives the bill) and communication to OU
  - Conference Organizers, Section Chairs, Chapter Chairs, Student Branch Chairs

- Geo Unit Leadership you should work closely with all of your TCS conferences on this new process
  - Do you need assistance in deciding how to allocate fees?
  - MCE & MGA staff is available to help!

MGA & IEEE MCE
The Process
Process for Technical Co-Sponsorship Allocation

- Conference Application Submission
- Application is submitted by conference organizer or other designee of the conference
- The application is processed and information is validated
- Application is identified as a technically co-sponsored conference and new TCS process begins
Process for Technical Co-Sponsorship Allocation

- Meetings, Conferences & Events (MCE) will send an email communication to the GeoUnit Leadership asking for a decision on how to manage the technical co-sponsor fee.
  - GeoUnit Chair, Vice-Chair, Secretary, Treasurer
Request for TCS Fee Allocation Decision

Email
Society Sample

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Subject: Request for TCS Fee Allocation Decision: 2016 IEEE MCE Conference 12345

Response By Email (Kevin) (12/15/2015 04:29 PM)
Dear IEEE Organizational Unit Leadership:

We have received a conference application for your event and your IEEE Organizational Unit (OU) is listed as a conference technical co-sponsor. As you are aware, technically co-sponsored conferences (TCS) with a start date of 1 January 2016 or later will be subject to a reallocation of existing technical co-sponsorship fees. In order to properly allocate the fee of US$1,000 per event and US$15 per paper, we need to hear from you.

We are asking that you submit your OU’s decision on how you would like to allocate your portion of these fees. You may choose to allocate the fees to your OU, the conference or a combination of both.

Please indicate your decision by responding to this email at your earliest convenience. Once we receive the decision(s) we will provide you with a document which commemorates the TCS fee allocation decision(s).

Your IEEE OU or conference will receive an email which can serve as an invoice once we have received and processed your conference proceedings.

To view the details of your conference, please click the link: http://www.ieee.org/conferences_events/conferences/organizers/conf_app.html?pageType=saveConfPDF&confRecordNum=12345&userAction=conferenceDetails

The IEEE Meetings, Conferences & Events team is here to help. If you have any questions, please contact us at ieee-mce@ieee.org and reference this Conference Title and Record Number in the subject line.

Best regards,
IEEE Meetings, Conferences & Events
Phone: +1 888 340 4333 (Toll Free US & Canada)
  +1 732 562 3578 (Worldwide)
E-mail: IEEE-MCE@ieee.org
www.ieee.org/conference-organizers
IEEE: Advancing Technology for Humanity

Incident Reference # 151215-000876
Process for Technical Co-Sponsorship Allocation

- Technical Co-sponsorship (TCS) fee allocation decisions are received, commemorated and communicated to all IEEE Technical Co-Sponsors and conference organizers responsible for the fees.
Response By Email (Kevin) (12/15/2015 04:32 PM)

Dear IEEE Organizational Unit (OU) Leadership:

We are pleased to inform you that we have received all decisions on how to allocate the technical co-sponsor fees for this conference. We are excited to proceed with the processing of your conference application.

The details on the decision(s) are as follows:
IEEE ABC Society: Charge OU all fees
IEEE XYZ Society: Charge conference all fees

Please save and download this email for your records.

The IEEE Meetings, Conferences & Events team is here to help. If you have any questions, please contact us at ieee-mce@ieee.org and reference this Conference Title and Record Number in the subject line.

Best regards,
IEEE Meetings, Conferences & Events
Phone: +1 855 340 4333 (Toll Free US & Canada)
+1 732 562 3878 (Worldwide)
E-mail: IEEE-MCE@ieee.org
www.ieee.org/conference-organizers
IEEE: Advancing Technology for Humanity

Incident Reference # 151215-000878
Process for Technical Co-Sponsorship Allocation

- The Memorandum of Understanding (MOU) is fully executed
- Conference is then approved
Billing Process and Experience

Timeline
Experiance for Conferences
Timeline of TCS Billing

Conference Approval → Publish Proceedings → Pay TCS Fees

▶ With Publication
  • The designated party for the conference will be billed shortly following when the content is received by IEEE

▶ Without Publication
  • The designated party for the conference will be billed in the month following the end of the event
    • Flat fee - $1,000 USD

Operation Cost
Conference Billing Experience

- Conference will receive electronic invoice from a representative of the IEEE Accounts Receivable department
  - IEEE A/R invoice created for conference - see example below
- Questions regarding detail listed on the TCS invoice should be directed to tcspaymentprocessing@ieee.org.
  - All other TCS inquiries should be directed to mgatcs@ieee.org
MGA & MCE Support

▸ We are here to support you through the process!
General Inquiries
▸ MGA & MCE
  - mgatcs@ieee.org
Summary

- Fees apply only to technically co-sponsored conferences
- Conference application is submitted, then MCE reaches out to the GeoUnit for TCS fee decision
- MCE cannot move forward without a decision
- MOU is executed and conference is approved
- After conference is over and proceedings are received, billing is processed
- We’re here to support you!
Thank You
The Conference Education Program

https://ieee-elearning.org/CLE/
Conference Education Program

- eLearning Courses
- MCE Webinar Series
- Workshops
  - Train the Trainer
  - MCE Led

Learn Best Practices Before You Get Started!
The Center for Leadership Excellence

https://ieee-elearning.org/CLE/

eLearning Courses & Webinar Playbacks Reside in The Center for Leadership Excellence
Role Based Learning Tracks

Conference Chair
Treasurer
Technical Program Chair
Publications Chair
Event Management
WELCOME TO THE IEEE CENTER FOR LEADERSHIP EXCELLENCE

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

PLEASE NOTE: SOME CONTENT AND FEATURES ARE STILL UNDER DEVELOPMENT AND WILL BE AVAILABLE IN THE COMING MONTHS.

TRY IT NOW! - To view content you have already been enrolled, click on the Dashboard link above.

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Elected or Appointed Volunteers can access their Action Plans and Recommended Training based on position.

VOLT PROGRAM

Volunteer Leadership Training Program develops future IEEE leaders. It targets active volunteers with two or more years of volunteer experience, who seek an in-depth knowledge of the IEEE organization, its structure, and resources available to them.

CONFERENCE & EVENTS

Access to courses that support a Conference Chair, Technical Program Chair, Conference Treasurer, Publications Chairs, Event Management, and more.

OTHER

Under Construction - Content will target new IEEE members and other groups of users who want to learn about the IEEE.
### ROLE BASED TRACKS

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<tr>
<th>Program Name</th>
<th>Program Summary</th>
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<tbody>
<tr>
<td>Publications Chair</td>
<td>The Publication Chair is responsible for the coordination of production of conference content (e.g., papers from special tutorial sessions or colloquia, summaries of conference papers, programs, etc.) and serves as the point of contact for all IEEE Xplore submission-related inquiries before and after the conference.</td>
</tr>
<tr>
<td>Treasurer</td>
<td>The Conference Treasurer is responsible for ensuring all financial, tax, and audit requirements are met. Some of these requirements include establishing conference bank accounts, indirect tax, insurance and bonding, budget, expenses, financial reports, and conference closing. Also responsible for the final audit, if required.</td>
</tr>
<tr>
<td>Technical Program Chair</td>
<td>The Technical Program Chair ensures that a well-balanced, high-quality program is organized and presented at the conference. Handles the Call for Papers through the selection and review of every paper. Assists in the scheduling of session rooms and helping with local arrangements for the program.</td>
</tr>
<tr>
<td>Event Management</td>
<td>IEEE MCE is a dedicated partner made up of event industry experts driven to shape innovative and high-quality events. Learn best practices that you can apply to your conference!</td>
</tr>
<tr>
<td>Conference Chair</td>
<td>The Conference Chair is typically appointed by the sponsoring organization. Often responsible for selecting the conference location, Appoints the chairs of the other committees, who make up the conference committee.</td>
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