



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)



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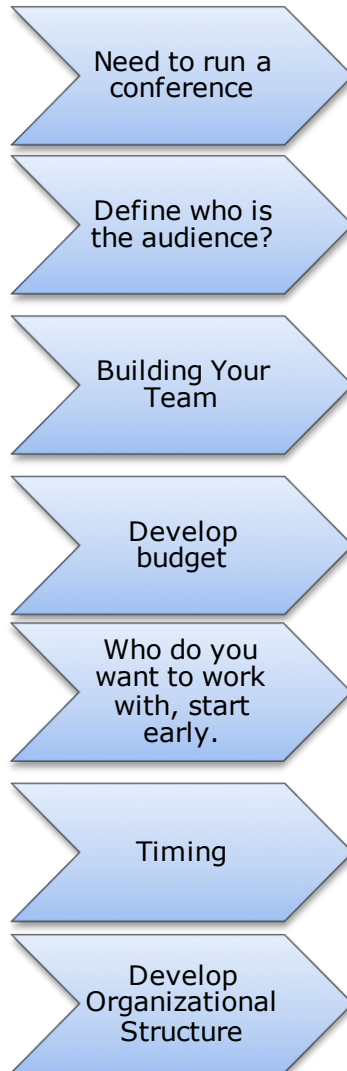
BASICS

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

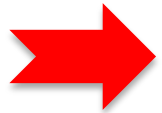
► Technical Co-sponsorship

- The IEEE OU provides direct and substantial involvement in the technical program

*OU – Organizational Unit (example: society, section, chapter, council)

Sole Sponsorship

IEEE OU - Complete Responsibility



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

IEEE OU – Shared Responsibility

- ➔ 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

IEEE OU – Technical Program Responsibility

- 
- 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

Technical Co-Sponsorship

IEEE OU – Technical Program Responsibility (continued)

- ➔ 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*®)

<http://ieeer8.org/wp-content/uploads/2011/12/Understanding-MGA-TCS-Cost-Allocation-2282018.pdf>

<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



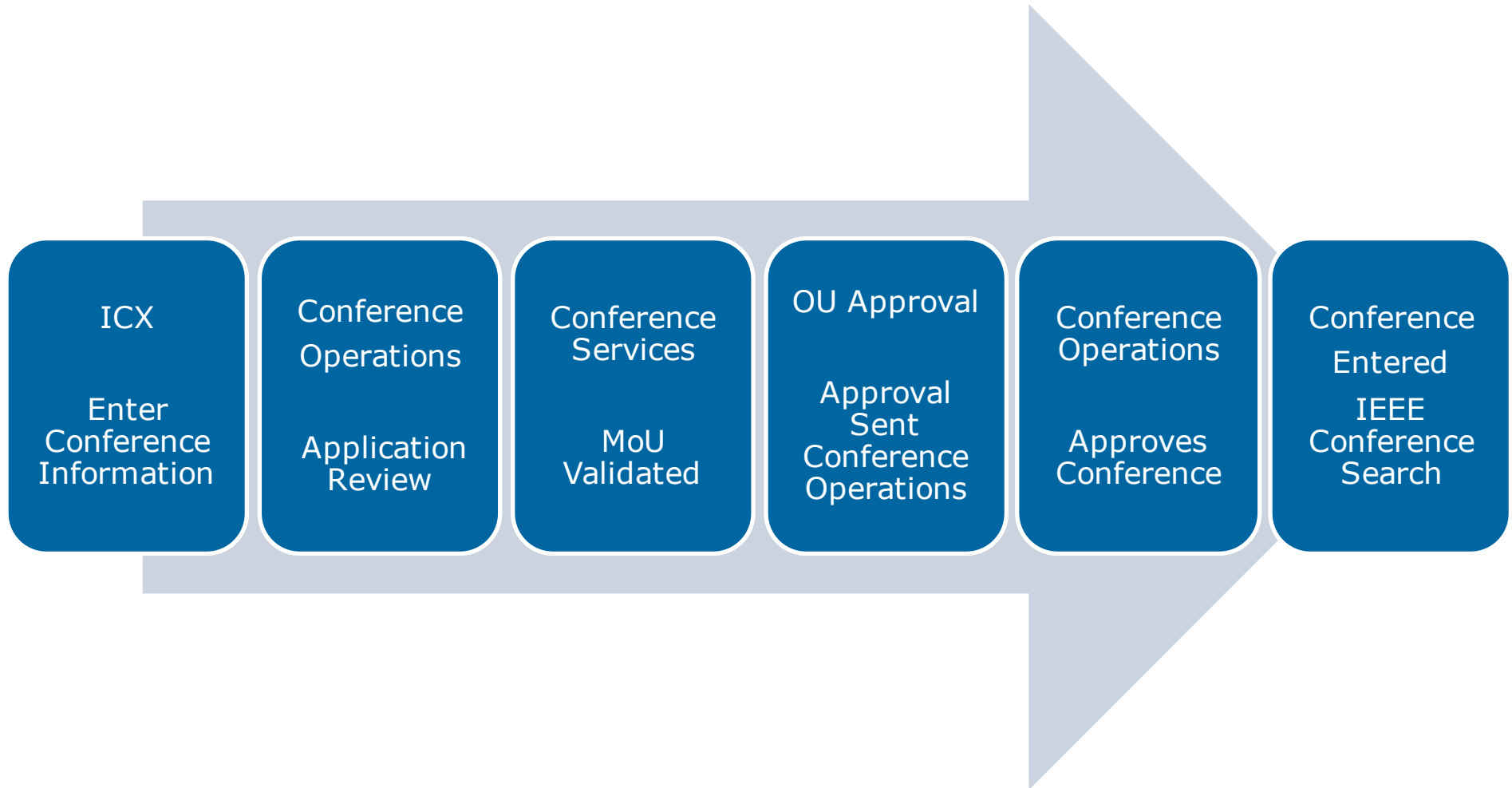
- Before submitting an application, the following information should be known:
 - Conference Title
 - Acronym (if available)
 - Dates & Location
 - Estimated budget
 - Copyright Owner
 - Information about the Technical Program
 - Contact information for Committee Chairs & List of committee names (if available)
 - IEEE & Non-IEEE Sponsorship (technical or financial)
- Timing: Typically 12-18 months prior to the conference start date

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.

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

Getting Started

Conference Timeline



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

R8 Conference Organizer's Handbook

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

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
- AFRICON 2019, 25-27 September, Accra, **Ghana**, africon2019.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.](#)

Conference Application

Benefits of Registering Your Conference

Approved Conference Eligibility

See slide [No15](#).

Conference Publications

IEEE *Xplore*

- The Leading Technology Resource in the Field

- 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.
<https://www.ieee.org/publications/rights/cross-check-portal.html>



MCE

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

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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

[illegible]

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

Project management

- 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

IEEE Center for Leadership Excellence

- ▶ CLE website offers a "one stop" training solution, a simpler and effective learning experience.

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





- ▶ Courses <https://ieee-elearning.org/CLE/totara/coursecatalog/courses.php>

Course Name	Date Uploaded	Content
 PLAYBACK - General Data Protection Regulation (GDPR) for Events	30 Jan 2019	 
 Senior Member Elevation	27 Dec 2018	
 Industry Liaison Training	27 Dec 2018	 
 Top VoLT Projects	20 Dec 2018	

Trainings

- 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

RECOMMENDED TRAINING	
Volunteer Position	Program Summary
 Section Chair	As Section Chair you are the leader and the individual responsible for influencing and motivating your members toward the success of your Section. Whether you are new to the role or if you have been Section Chair for a while, we encourage you to review the Action Plan for this role and recommended training . They provide information designed to help you manage and lead your Section effectively.
 Section Vice Chair	The position of Section Vice Chair is important. In many Sections the Vice Chair is elected to succeed the Section Chair. The Vice Chair is also called on to lead the Section when the Chair is absent. As the Vice Chair, you assist the Section Chair in managing the operations of the Section in the best interest of the local members, and provide leadership and guidance to Section volunteers. Whether you are new to the role or if you have been Section Vice Chair for a while, we encourage you to review the Action Plan for this role and the recommended content. The information will help you be an effective contributor to your Section.

CONFERENCE EDUCATION PROGRAMS	
Program Name	Program Summary
 Publications Chair	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.
 Technical Program Chair	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.
 Conference Chair	The Conference Chair is 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.
 Treasurer	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.

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IEEE CONFERENCE ORGANIZERS' NEWS

powered by IEEE Meetings Conferences & Events



- ▶ ..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

MCE Event Management Services	MCE Educational Webinar Series	MCE Conference eLearning Courses	MCE Conference Workshops	Conference Organizer Toolkit	IEEE Event Emergency Response Team
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<https://ieeemce.org>



<https://ieee-elearning.org/CLE/totara/program/view.php?id=34>



<https://ieee-elearning.org/CLE/totara/program/view.php?id=33>



<https://www.ieee.org/conferences/organizers/conference-organizer-education.html>



<https://www.ieee.org/conferences/organizers/conference-organizer-toolkit.html>



<https://ieeemce.org/emergency/>

We are here to provide support...



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