



Region 8 Conference Organisation Basics (for conference organization greenhorns)

R8 CoCSC 2015

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Agenda

- ✓ **Steps in Starting a Conference**
- ✓ **Sponsorship Overview**
- ✓ **What does co-sponsoring with IEEE Region 8 cost?**
- ✓ **Obtaining IEEE Approval-IEEE Conference Exchange (ICX)**
 - ✓ **Timeline**
 - ✓ **Conference Operations Review**
 - ✓ **MoU**
 - ✓ **Conference Approval**
- ✓ **IEEE Region 8 Conference Practices**

Beginning Stages: Conference Creation

Starting a conference....it begins with an idea!

Need to run a conference

New research to share

Define who is the audience?

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

Building Your Team

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

Develop budget

Budgeting helps understand how many sponsors you may require

Who do you want to work with, start early.

Sponsor evaluation – IEEE Organization Unit (OU), Non-IEEE Organizations

Timing

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

Develop Organizational Structure

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)

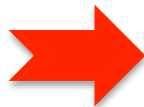
Sole Sponsorship

IEEE OU - Complete Responsibility

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- 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 conference.
 - Escalate any legal issues to IEEE Conference Business Services
 - Obtain approval of conference from IEEE


Co-Sponsorship

IEEE OU – Shared Responsibility

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- 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 public relations
 - ▶ A Memorandum of Understanding (MOU) is required. It defines the responsibilities of each party

Technical Co-Sponsorship

IEEE OU – Technical Program Responsibility

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- 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

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

What does co-sponsoring with IEEE Region 8 cost?

R8 TCS fee

Requirements and standard application forms are available on R8 CoCSC homepage

Non-IEEE conferences are charged a general **administrative fee of US \$ 500.00** for R8 Technical Co-Sponsorship.

Exempt: Conferences with *financial* co-sponsoring of any IEEE entity (society, section, chapter, ...)

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
 - Member CD
 - PDF eXpress/PDF eXpress PLUS

Conference Application Process

ICX

- IEEE Conference Exchange (ICX) is the IEEE conference management platform
- IEEE launched the first phase of ICX in June 2012 with the introduction of the IEEE Conference Application, with integrated Memorandum of Understanding (MOU) development
- Conference Publication Form was integrated into ICX in August 2013, along with eCopyright and PDF eXpress
- Conference Organizer Website – online form
 - http://www.ieee.org/conferences_events/conferences/organizers/conf_app.html
- ICX Checklist of Required Information
 - http://www.ieee.org/conferences_events/conferences/organizers/icx_required_information_checklist.pdf
- ICX “How To” Tutorials
 - http://www.ieee.org/conferences_events/conferences/organizers/conference_education.html

Basic Information Needed to Submit an Application

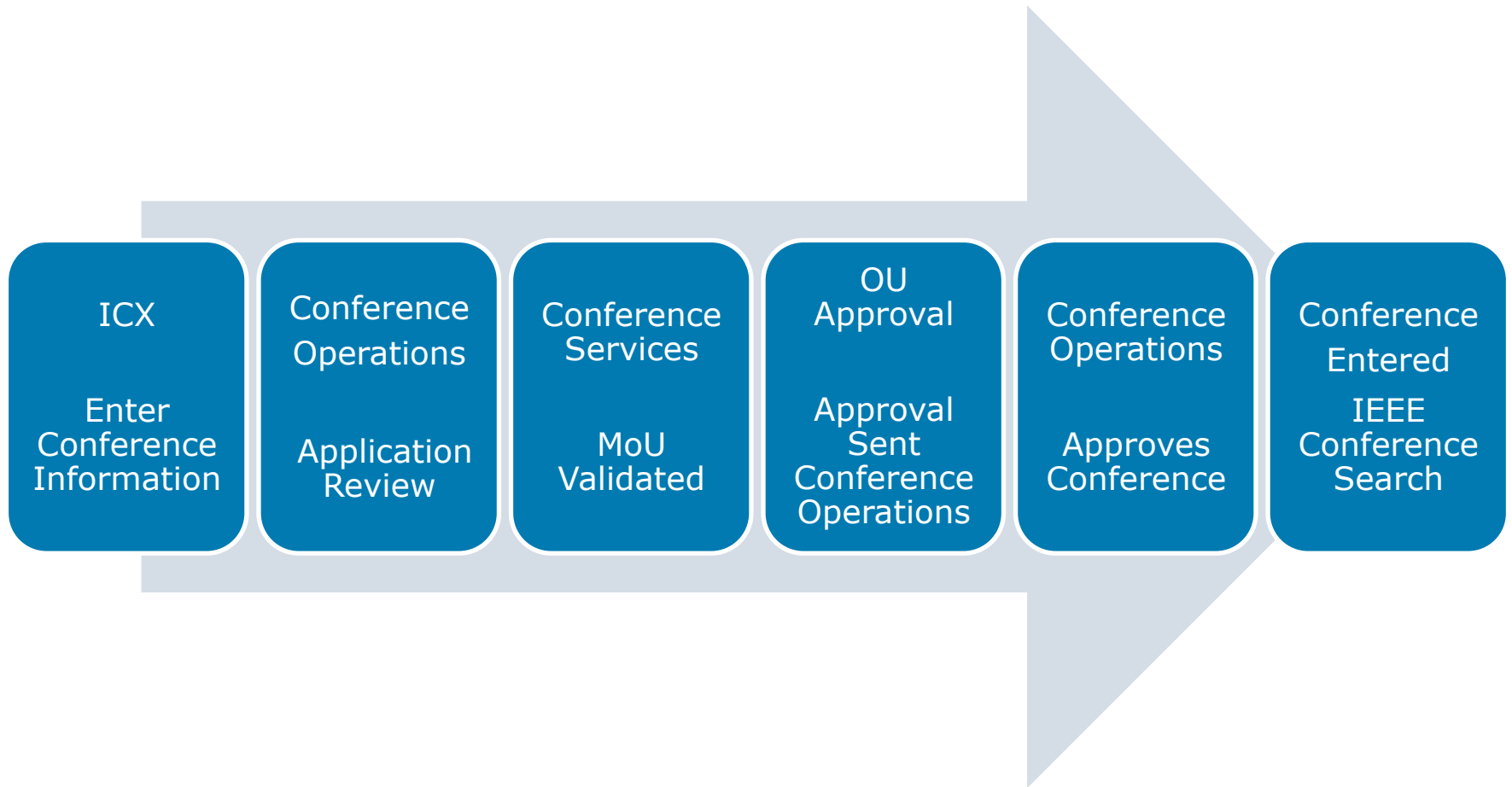


- Before submitting an application, the following information should be known:
 - Conference Title
 - Acronym (if available)
 - Dates & Location
 - Estimated budget
 - Copyright Owner
 - Information about the Technical Program
 - Contact information for Committee Chairs & List of committee names (if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

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

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 ICX

- ▶ 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 (odd years)

AFRICON (odd years)

MELECON (even years)

ENERGYCON (even years)

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)

IEEE R8 CoCSC

If you need help, please don't hesitate to contact the R8 CoCSC team (Adel Alimi, Peter Nagy, Jan Haase) at R8CoCSC@listserv.IEEE.org