IEEE R8 Conference Leadership Workshop

Monday 25 August 2025
From 9:00 AM to 03:30 PM (UTC+01:00) West Central Africa

Room Utique, Verdi Tunis Beach Resort, Gammarth - Tunis, Tunisia

Co-located with the IEEE Conference RTSI, 2025

https://2025.ieee-rtsi.org/ieee-r8-conference-leadership-workshop/

IEEE

Content of the IEEE R8 Conference Leadership Workshop

1. "**Introduction to R8 CoCC and program**" - Tiziana Tambosso (R8 VC Technical Activities and R8 CoCC past-chair) (slides 3-8)

2. "**Welcome message and IEEE strategies**" - Kathleen Kramer (IEEE President) (Slides 9-22)

3. "**IEEE CEE Overview and services**" – Marie Hunter (Managing Director, IEEE Conferences, Events & Experiences)
   and Alissa Maldonado (Senior event planner, IEEE CEE) (Slides 23-39)

4. "**Why run an IEEE Conference**", Tiziana Tambosso (R8 VC-TA) (Slides 40-60)

5. "**IEEE Sponsorship Opportunities, Conference Approval, and the Role of Section Conference Coordinators**", Filippo Sanfilippo (R8 CoCC) (Slides 61-87)

6. "**R8 sponsorship benefits and requirements, R8 Steering Committee of R8 flagship/portfolio conferences**", Ahmed Hassan Yousef (R8 CoCC)
   (Slides 88-121)

7. "**Managing your technical program" (Timeline, scope, peer review, similarity check)**" , Ilhem Kallel (R8 CoCC) (Slides 122-165)

8. "**Publication chair role**", Peter Nagy (IEEE MGA Ad Hoc Committee on Conferences) (Slides 166-190)

9. "**The Research and Technology for Society and Industry (RTSI) model – how to engage industries**", Giambattista Gruosso (RTSI 2024 General Chair)
   (Slides 191-208)

10. "**The international Humanitarian Technology Conference - best practices**" Massimo La Scala (IHTC 2024 General Chair) (Slides 209-236)

11. "**Treasurer Role and financial issues**", Adam Jastrzebski (IEEE R8 Treasurer) (Slides 237-254)

IEEE

Conference Leadership Workshop

Tiziana Tambosso

IEEE R8 Vice-Chair Technical Activities

Purpose of this workshop

Purpose:
Provide information and guidance
to develop a successful IEEE conference

To:

IEEE R8 Section chairs, Section Conference Coordinators, Chapter Chairs and IEEE R8 Conference Leaders and perspective conference organizers

Organized by IEEE R8 Conference Coordination Committee (CoCC) in cooperation with:
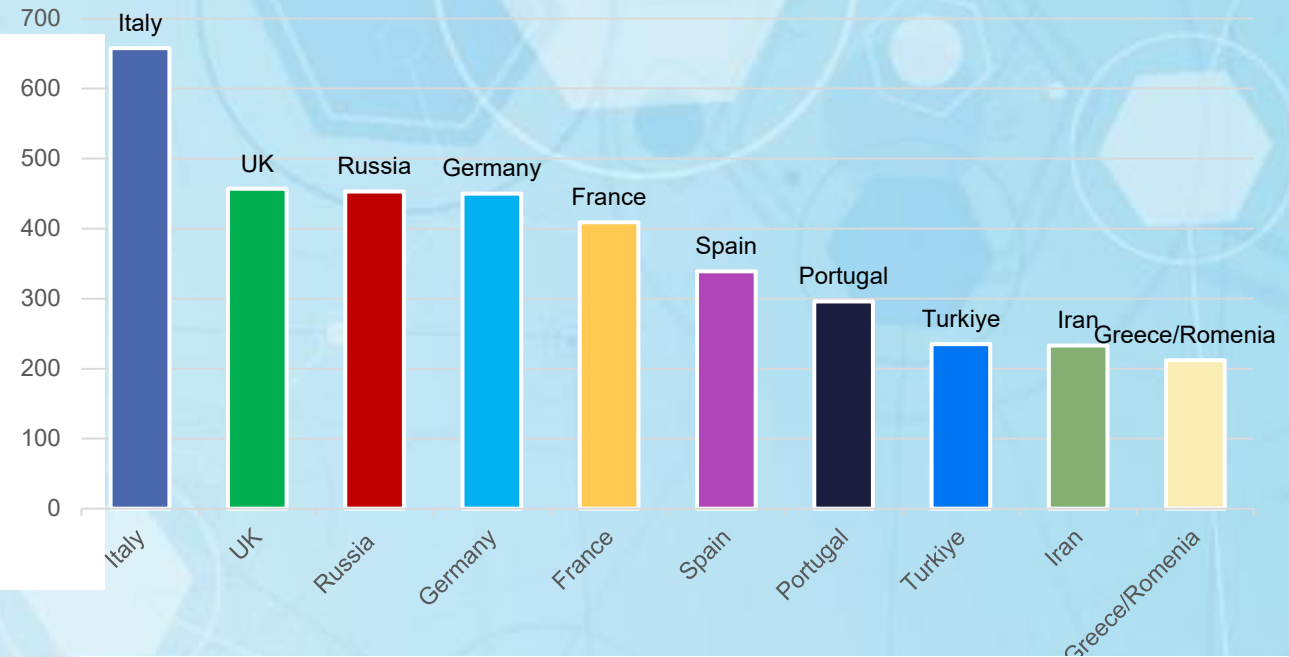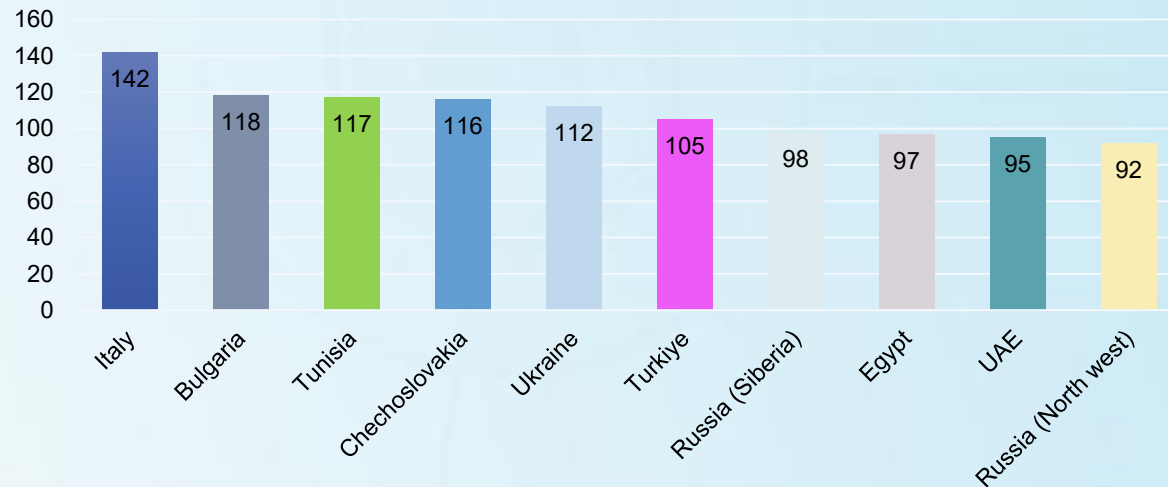IEEE Conferences Events & Experiences (CEE)

Statistics

In the last 10 years (2016- March 2025)

- ➤ **7,040** Conferences were organized in R8

- ➤ **23.5%** were TCS by R8 **Sections**

- ➤ **11.3%** were FCS by R8 **Sections**

- ➤ **R8** TCS **102** and FCS **108** conferences

TOP 10 COUNTRIES IN LAST 10 YEARS

TOP 10 SECTION TCS/FCS CONFERENCES IN LAST 10 YEARS

Reg 8 Submissions by Year and Conference Type

Conference Type Descrip...
- Nonieee Sponsor Conf
- Sponsor Financial Co
- Technical

Recommendations

- Appoint Section's Conference Coordinator (for Section chairs)

- Increase your involvement in the IEEE Society conferences organized in your country (for Section and Chapters – be involved as TCS or FCS)

- Cooperate with other R8 Sections to organize conferences/events

- In your TCS/FCS conferences, always plan to organize one or more of these events:
  - IEEE Booth
  - Industry oriented workshop
  - Entrepreneurship Workshop
  - Humanitarian workshop
  - Professional and Education Activities
  - WIE and SYP events and competitions
  - Student Paper Contest/Competitions/hackathons

Useful links and training material

Contact Information

conferences.officer@ieeer8.org

IEEE R8 CoCC website

https://ieeer8.org/conference-coordination

IEEE CEE website

https://events.ieee.org/

Center for Leadership Excellence

https://ieee-elearning.org/totara/dashboard/index.php?id=5
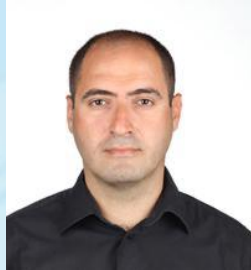
Let's advance together

Conference Coordination Committee 2025
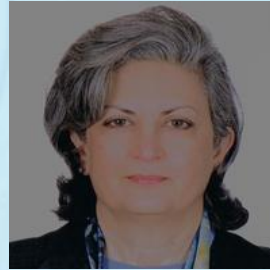

Rene Garello
(France)
Chair

Tiziana Tambosso
(Italy)
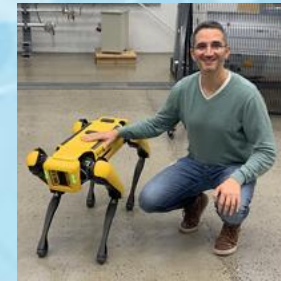Past Chair

Ibrahim Kucukdemiral
(UK & Ireland)
Member

Ilhem Kallel
(Tunisia)
Member

Tulay Yildirim
(Turkey)
C. Member

Albert Lysko
(South Africa)
C. Member

Filippo SanFilippo
(Norway)
C. Member

Ahmed Hassan
(Egypt)
C. Member

Abdelhamid Iratni
(Algeria CM3)
C. Member

François Rivet
(France)
C. Member

Katerina Papanikolaou
(Cyprus)
C. Member

Nadezhda Kunicina
(Latvia) C. Member,
Special Appointment for
Cross-Sectional Events

Sergio Rapuano
(Italy) C. Member
Liaison with IEEE S/Cs and NA

Toni Mattila (Finland)
Liaison with AfI

Pascal Lorentz (France)
Liaison with Finance C.

Rodolfo Oliviera (Portugal)
Liaison with Climate Change C.

Ex-Officio members:
- Maciej Ogorzalek (Poland)
- Shmuel Auster (Israel)
- Dominique Schreurs (Belgium)
- Shashank Gaur (Portugal)
- Ana Perez-Neira (Spain)

IEEE Region 8

IEEE

IEEE Strategies for the Future of Technology and Leadership

Kathleen Kramer, 2025 IEEE President & CEO

IEEE R8 Conference Leadership Workshop

Gammarth, Tunis, Tunisia

25 August 2025

Inspiring a Global Community of Innovation

Where forward-thinking technology professionals collaborate

- To discover what's next in technological innovation
- Create international standards
- Build technical communities
- Shape and share research

Commitment to this mission and vision from our members and volunteers is what empowers and defines IEEE.

Our Mission

The core purpose of IEEE is to foster technological innovation and excellence for the benefit of humanity

Our Vision

IEEE will be essential to the global technical community and to technical professionals everywhere, and be universally recognized for the contributions of technology and of technical professionals in improving global conditions

www.ieee.org

IEEE is Committed to Advancing Public Imperative Activities

- Leveraging technology for the benefit of humanity and society
  - Community building
  - Education
  - History
  - Humanitarian technologies
  - Public policy
  - Sustainability
- Where our technologies are of significant public impact
- Increasing the public's understanding and appreciation of engineering, science, and technology.

Why do Public Imperative Activities Matter to IEEE?

IEEE is a Section 501(c)(3) Public Charity

- "To engage exclusively in scientific and educational activities [...] for the benefit of the engineering community and the general public"

- Public imperative activities show the world IEEE's charitable impact on society

Mission Statement

IEEE's core purpose is to foster technological innovation and excellence **for the benefit of humanity.**

IEEE Strategic Plan

2025-2030

OUR MISSION

We foster technological innovation and excellence for the benefit of humanity.

OUR VISION

We will be essential to the global technical community and to technical professionals everywhere, and be universally recognized for the contributions of technology and of technical professionals in improving global conditions.

CORE VALUES

- Growth & Nurturing
- Trust
- Partnership
- Integrity in Action
- Global Community Building
- Service to Humanity

OUR GOALS

Advance science and technology as a leading trusted source of information for research, development, standards, and public policy

Drive technological innovation while promoting scientific integrity and the ethical development and use of technology

Provide opportunities for technology-related interdisciplinary collaboration, research, and knowledge sharing across industry, academia, and government

Inspire intellectual curiosity and support discovery and invention to engage the next generation of technology innovators

Expand public awareness of the significant role that engineering, science, and technology play across the globe

Empower technology professionals in their careers through ongoing education, mentoring, networking, and lifelong **engagement**

IEEE will foster a collaborative environment that is open, inclusive, and free of bias and will continue to sustain the strength, reach, and vitality of our organization for future generations.

www.ieee.org/strategic-plan

Approved by the IEEE Board of Directors, November 2024

IEEE
Advancing Technology for Humanity

IEEE Strategic Plan 2025-2030

The IEEE Strategic Plan is a vital part of the ongoing evolution of IEEE. The Plan provides a clear picture of IEEE as an organization, and the initiatives that will move IEEE forward in the coming years.

> Download the IEEE Strategic Plan (PDF, 2 MB)

IEEE Strategic Plan Toolkit 2025 - 2030

Through six new strategic goals, the IEEE Strategic Plan 2025–2030 focuses on furthering IEEE's role as a leading trusted source, driving technological innovation and inspiring the next generations of technologists, further engaging the public, and empowering technology professionals throughout their careers.

Below are resources to help you communicate and share the plan in both print and digital format.

Contact us by using the IEEE Experience Design Team Contact Form for print production options for local meetings and events.

Toolkits
- IEEE Publicity Toolkit
- IEEE Collabratec Branding and Communications Toolkit
- IEEE Digital Marketing Campaign Toolkit
- IEEE Open Access Toolkit
- IEEE Strategic Plan Toolkit 2025 – 2030
- IEEE App Marketing Toolkit
- IEEE Periodical Journals Marketing Toolkit
- IEEE Social Media and Communications Toolkit for Authors
- IEEE Social Media Toolkits
- IEEE Volunteering Platform Toolkit
- IEEE Your Professional Home Toolkit
- IEEE eLearning 50% Discount Toolkit
- IEEE Membership Renewal Toolkit 2025
- IEEE Member Exclusive Fun Connect Toolkit

Other toolkits

On this page:
- Carousel images
- Digital & print ads
- Flyers
- Icons
- Posters
- Clings
- Pull-up banner
- Table top size banner
- Table tent card
- Pocket guide
- PowerPoint
- Social Media
- Newsletter

Carousel images

Carousel images with overview of the IEEE Strategic Plan.

File sizes: 470x350px, 700x525px, 1110x350px, 940x560px

Download the Carousel images (ZIP, 1MB)

How do We Get There: IEEE Core Values

GROWTH & NURTURING: encouraging education as a fundamental activity of engineers, scientists, and technologists at all levels and at all times; ensuring a pipeline of students to preserve the profession.

PARTNERSHIP: promoting a culture of respect for the employee and volunteer, valuing contributions at all levels of the organization, investing in training and development to enhance capabilities, empowering individuals to make a positive difference, and building a membership organization based on a strong volunteer-staff partnership to serve the profession.

GLOBAL COMMUNITY BUILDING: cultivating active, vibrant, and honest exchange among cross-disciplinary and interdisciplinary global communities of technical professionals.

TRUST: being a trusted and unbiased source of technical information and forums for technical dialog and collaboration

INTEGRITY IN ACTION: fostering a professional climate in which engineers and scientists continue to be respected for their exemplary ethical behavior and volunteerism.

SERVICE TO HUMANITY: leveraging science, technology, and engineering to benefit human welfare; promoting public awareness and understanding of the engineering profession.

Leveraging the power of **One IEEE** through coordinated activities to increase the impact of our global mission to advance technology for humanity

This underlies everything we do.

Empowering the success of our technical communities, globally and locally, to share and foster technical knowledge and enhance our professional lives.

Our most significant accomplishments stem from sincerely valuing and including different interests and perspectives, and teaming towards strategic goals that allow the whole to become greater than the sum of the parts.

How Should We be Leading?

Transformational leaders encourage, inspire, and motivate others to perform in ways that create meaningful change.

The result is an engaged volunteer base that's empowered to innovate and help shape the organization's future success.

As we advance technology for humanity, we want to know and understand what motivates and inspires.

Offering more and more "value" is often an anti-winning strategy.

We must strive to apply our technical expertise and technology for the benefit of our members and the public.

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How do You Lead?

- Leadership Through…
  - ➢ Excellence
  - ➢ Impact
  - ➢ Passion
  - ➢ Empowerment
  - ➢ Engagement
  - ➢ Service

…Authority, Transaction, Delegation, Participation

Yes, you can do good by advancing technology. You could also apply technology to do good…

"Public Imperatives" are measured by impact rather than revenue or surplus. We must strive to apply our technical expertise and technology for the benefit the of the public or *humanity*.

What Does Success Look Like?

- **Engagement:** Increasing and engagement and support through local volunteers and true collaboration with the constituent communities.

- **Education:** Raising awareness and developing sharable resources.

- **Accountability:** Data needs to be meaningful, with benchmarking and recognizing impacts, with design iterations, pivoting, and re-targeting efforts.

- **Celebration:** Encouraging, showcasing, and rewarding role models and strengths.

- **Communication:** Sharing these efforts effectiv for lasting positive impact.
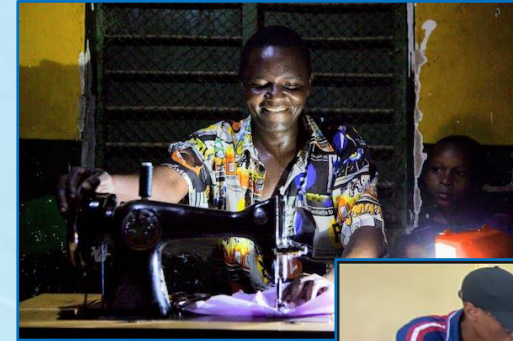
Thoughts for Our Leaders

To help as you lead and seek leadership from others ...

- You get what you give, but **time is a zero-sum game**. Give your time and talents to shared big goals and meaningful high-impact projects.

- Wisdom takes a desire to gain and to learn from our shortcoming.

- You need to find the right collaborators and collaborations for your kind of thinking and working and learning. You are empowered by complementary skills.

- Learn to advocate graciously and regularly for yourself.

- Know what you don't know and don't hide from it. Know when you are already the smartest person in the room and believe in your abilities to help others and yourself become that.

" YOUR MINDSET DETERMINES THE SIZE OF YOUR SUCCESS "

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Volunteering develops your professional and financial skills while honoring obligations to our membership.

- As a leader, technically I need to "own" my meetings and be entrepreneurial in growing careers and the resources to carry out **IEEE's mission**.

- **Effectiveness** and **efficiency** is the core charge of IEEE volunteers.

- Achieving the opportunities and goals in your volunteer life is also **an opportunity** for you in your professional life.

- Valuing and providing **Financial Transparency** translates very well for working.

Thank you for your Service to IEEE!

- ✓ Volunteers are an essential part of IEEE
- ✓ It is vital to have diverse leaders to represent IEEE's dynamic communities:
  - ✓ Young Professionals
  - ✓ Women & Life Members
  - ✓ Technical breadth
  - ✓ Geographic reach
- ✓ Importance of recruiting and retaining our volunteers
- ✓ The energy, innovation, and fresh perspectives you offer are essential for our continued success!

thank you volunteers!

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Welcome

Marie Hunter, Managing Director, Conferences, Events & Experiences @IEEE

Alissa Maldonado, Senior Event Planner, Conferences, Events & Experiences @IEEE

A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity.

IEEE Conferences, Events & Experiences (CEE)

A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity.

Functional Org Chart

events@ieee.org

Marie Hunter
Managing Director, Conferences, & Experiences @IEEE

Jamie Clement
Executive Assistant
- Admin, Dept. Coordination and scheduling

Jacqueline Armstrong

Sr. Director, CEE
- Event Services
- Professional Training & Development
- Strategic Projects
- Vendor/Resource Management
- VIP/Board Events & Design
- Project staffing & scaling

Customer Relationship Mgt.
- Business Partner Lead/Point of Contact
- Special Requests/Projects
- Portfolio Review Partner
- Workflow Specification Needs
- Issues Management
- "Your HQ Insider"
- **A friend!**

Marybeth Denike

Senior Director Awards Activities
- Management of IEEE Medals and Awards
- Stewards of the IEEE Medal of Honor Program
- Board level committee support

Richard Jannuzzi

Sr. Director, Business Operations & Intelligence
- Conference Business Operations Lead
- Business Intelligence – and Management Reporting
- Project Office
- Planning/Market Analysis
- Event Contract team
- Sponsorship Agreements & MOU Operations
- Conference Proceedings Acquisition Support & Operations
- Business Operations, Innovations
- IT Roadmap and CEE Data Lead

Lea Provost

Director, Event Innovations and Experiences
- Audience Development
- Sponsorships, Exhibits & Job Fairs
- Social Impact for Events
- Tech exploration
- Third – Party Activations

Susan Root

Sr. Director, Conf. Services & Strategic Programs
- Conference Governance & Committee Support Lead
- Virtual Events Center of Excellence
- Conference Org. Education
- OFAC Screening Event Coordination
- Produced Events
- CEE Communications Hubs/Web
- Quality Oversight
- Peer Review Support Services
- IEEE Multimedia Operations

Sherry Sills

Director, Event Operations
- Business Development
- EERT (Event Emergency)
- Registration Services
- Travel Management
- Vendor Management
- GDPR for Event Services

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Leveraging Events for Impact

Objectives
What additional strategic objectives can you advance?

Location
What local opportunities exist (connections, challenges)?

Stakeholders
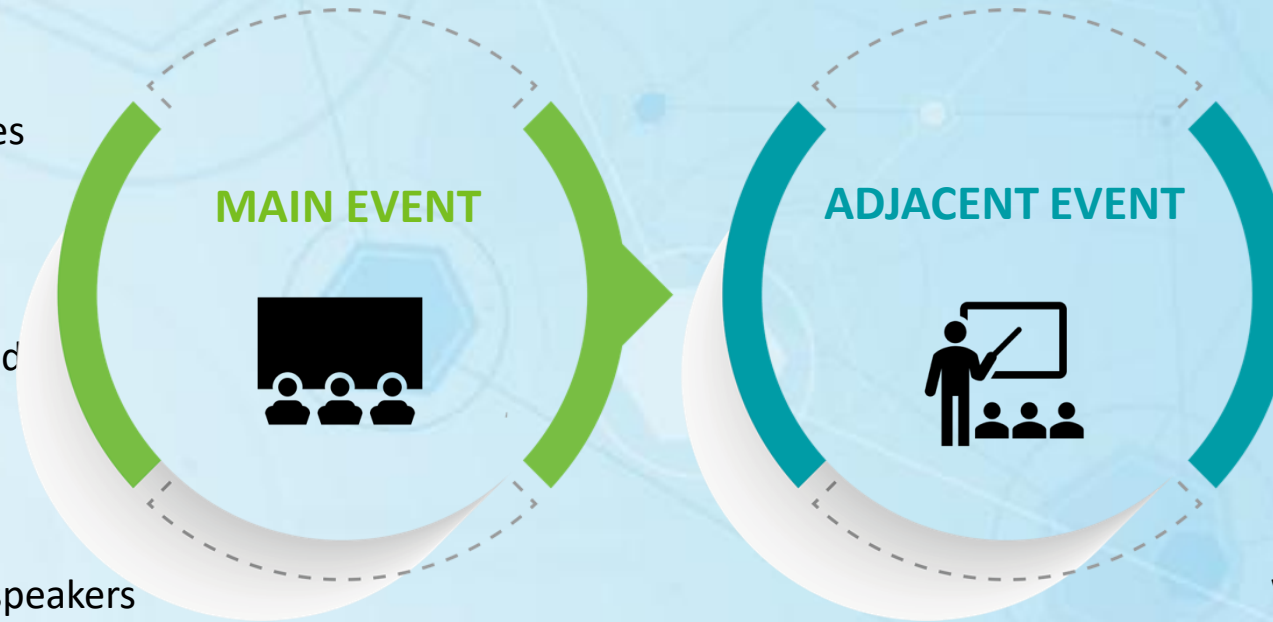How can stakeholders add value (e.g., leaders, decision-makers)?

Speakers
How can you leverage speakers (e.g., new audiences, topics)?

Audiences
What untapped or underserved audiences can you reach? (e.g., students, YPs)

Meeting at the Mission

MAIN EVENT

ADJACENT EVENT

Can your event serve as a fulcrum for delivering directly on the mission?

Connections
Which people or groups can you connect?

Dialogues
What conversations can you facilitate?

Industry
What industry partner goals can you support (e.g., recruiting)?

Exhibitors
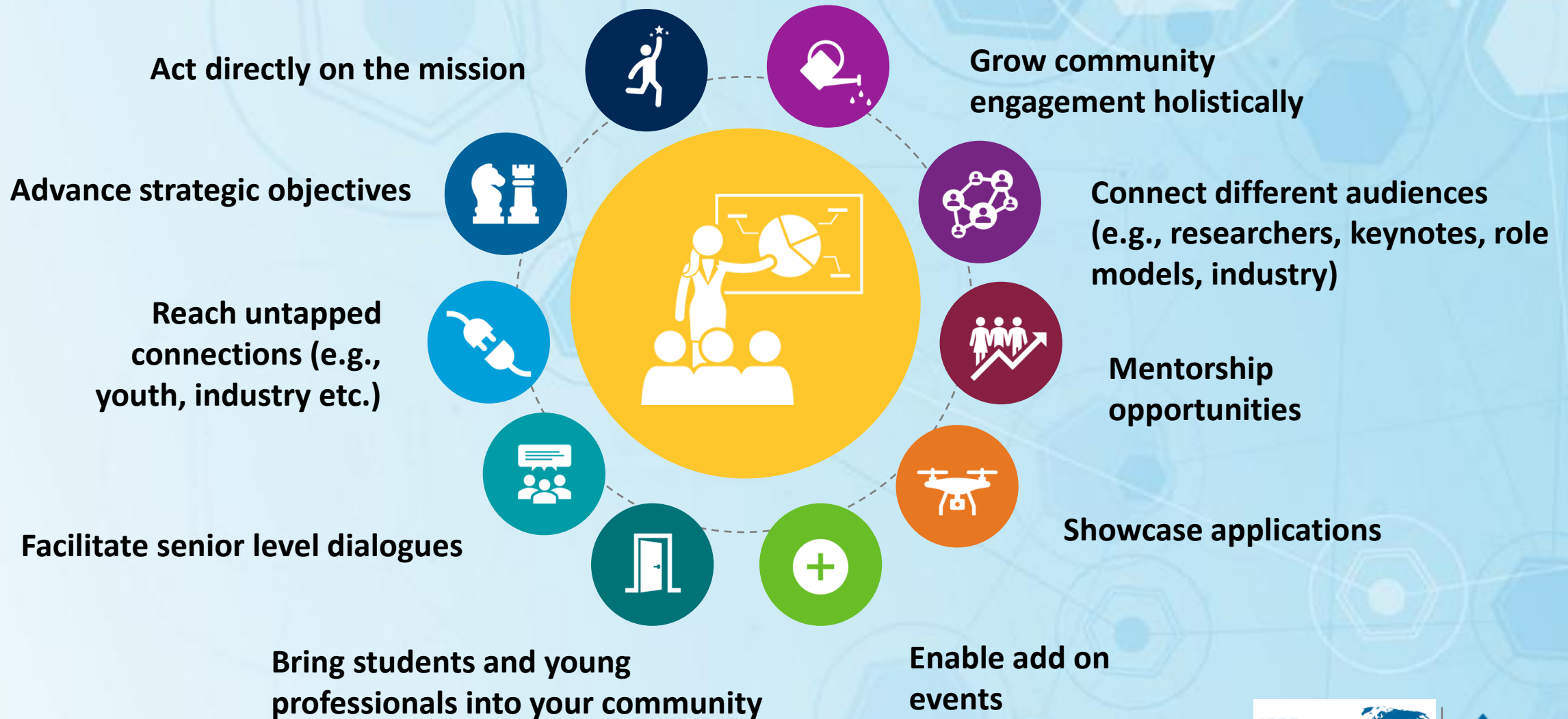What local exhibitors in the field can participate?

Social Impact
How can you give back to the local community?

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Events as Organizational Strategic Drivers

Act directly on the mission

Grow community engagement holistically

Advance strategic objectives

Connect different audiences (e.g., researchers, keynotes, role models, industry)

Reach untapped connections (e.g., youth, industry etc.)

Mentorship opportunities

Facilitate senior level dialogues

Showcase applications

Bring students and young professionals into your community

Enable add on events

Event Management Services

Establish Goals and Objectives

Communication Channels

Supplier RFPs & Comparisons

Food and Beverage

Create & Manage Project Timeline

Budget & Financial Management

Room Block Management

Pre-Planning Trips/Site Inspections

Manage Venue/All Suppliers

Transportation Logistics

Audio Visual Management

Post-Conference Reporting & Analysis

VIP Coordination

Onsite Management

IEEE CEE Audience Development

Increasing event attendance and awareness

Reaching New Audiences

We utilize a variety of attendee acquisition strategies to expand reach and awareness beyond the IEEE community.

Expert Guidance

As a complimentary service to IEEE sponsored events, we offer a free toolkit and brainstorming session to discuss best practices and ideas to grow your event.

Tools & Technology

We leverage tools and technology to expand reach and connect with untapped audiences.

Hands-On Services

Working directly with conference organizers, we manage campaigns to reach attendees across avenues. We offer Base, Elite, and custom options base on your event's needs.

IEEE Digital Events Center of Excellence

Create digital experiences that connect, captivate, and elevate

From symposia to summits, IEEE Digital Events transforms your content into immersive, accessible, and impactful experiences.

ENGAGING FORMATS
From webinars to roundtables, choose the right format to meet your goals and audience expectations

PRODUCTION EXCELLENCE
Live and pre-recorded production, rehearsals, and post-event editing ensure a polished experience

TECHNICAL EXPERTISE
End-to-end technical design and live support keep your event running smoothly

CONTENT STRATEGY
Support with speaker outreach, content curation, and storytelling to maximize engagement

AUDIENCE IMPACT
Engagement, Q&A moderation, and post-event analytics help you connect and measure success

STRATEGIC CONSULTING
Expert guidance tailored to your event's unique challenges, available anytime to support your planning and execution

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IEEE Preferred Attendee Registration Providers Program

Industry-leading registration platforms enhanced by expertise in IEEE-specific needs and processes.

UNIFIED ATTENDEE EXPERIENCE
Consistent branding & registration experience across IEEE events, regardless of size or location

IEEE SYSTEMS INTEGRATION
Seamless integration with IEEE systems for member validation, consent management, data lake

EFFICIENCY
Streamlined data collection and processing through intelligent automation

SECURE PAYMENT SOLUTIONS
Easy to use payment processing solutions included in the platforms

ENTERPRISE RELIABILITY
Enterprise-grade reliability, GDPR and PCI DSS compliant architecture

SUPPORT
Access to a robust knowledge hub and dedicated onboarding support, guidance, and troubleshooting

LEARN MORE!

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IEEE Preferred Registration Tools

Curated, Tested, Trusted

Best for Small to Medium-Sized Events

If you're planning a smaller event and need a simple, user-friendly platform, Accelevents is a great choice.

Best for Mid-size to Large Events

Cvent excels with large-scale events that require intricate registration systems, deep integrations with third-party platforms, and robust data analytics.

Best for Large Events, Trade Shows, and Expos

Stova is ideal for large-scale events that require extensive attendee management, networking features, and support for exhibitors and sponsors.

Best for Smaller to Mid-Sized Events Seeking Simplicity

Swoogo is perfect for organizers who want a straightforward, no-fuss event platform that is easy to implement and use.

IEEE Preferred PCO Program

CEE is working across the enterprise to recommend vetted Professional Conference Organizers (PCOs) to our conference volunteers

| strategic partnerships with vetted, experienced vendors | simplify and streamline b2b interactions | reduce transactions times | increase transparency & info exchange | enhance volunteer experience | make onboarding new PCOs easier | create compliance around tools | decrease risk |
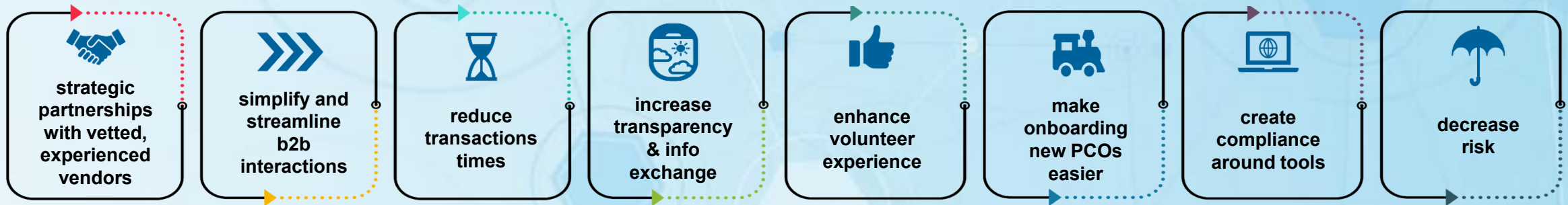
Current PCO Partners

Talley Management Group (Domestic)
Located in New Jersey
www.talley.com
Contact: Ethan Gray
Email: egray@talley.com

TFI Lodestar (International)
Located in London, England
www.tfilodestar.com
Contact: Gema Rodriguez
Email:
gema.rodriguez@tfilodestar.com

Additional partners will be onboarded throughout the coming year!

IEEE Express Desk

Discover the Perfect Venue — Easily

Behind every successful IEEE event is the right venue. IEEE Express Desk doesn't just find spaces—we find solutions tailored to your event's unique story and vision.

CURATED VENUE NETWORK
Access a curated network of vetted, high-quality venues tailored to your event

EXPERT GUIDANCE
Avoid common pitfalls with expert guidance on logistics, contracts, and capacity

PRICING ADVANTAGE
Unlock better pricing and terms through established industry relationships

BESPOKE SOLUTIONS
Ensure your venue aligns with your brand, budget, and audience experience

TIME-SAVING SERVICES
Save time with streamlined venue research, coordination for site visits, and negotiation support

ENHANCED IMPACT
Focus on content and impact while the logistics are handled

IEEE Multimedia and Studio Operations

LIVE EVENT STREAMING

Expand the reach of your event and engage a wider audience

INTERVIEWS

Amplify your speaker's message and expertise in the industry

SIZZLE VIDEOS

Create an emotional connection with your attendees and new audiences

MULTI-MEDIA

Enhance on-site presence through video messages and graphical elements

Visit the CEE Website for more information

events.ieee.org

- Find organizer information, news, and best practices

- Learn who to contact for support

- Try our handy conference planning checklist

- Find IEEE Conferences Committee member resources

- Explore CEE Services

- Access forms, tools, and templates

ONE IEEE EVENTS

A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity.

ONE IEEE EVENTS

- One IEEE events leverage people and resources across IEEE and in host city communities to drive technology, enable empowerment, and support stakeholder goals.
- The events are developed through partnerships between IEEE Sections and IEEE Societies with engagement from IEEE Regions, local IEEE Chapters, young professionals, industry, academia, local government, students, and more.
- With the support of sponsors, high-impact programs build momentum by encouraging dialogues and sparking collaboration.

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IEEE

2025 IEEE JAMAICA TALENT AND TECHNOLOGY EVENT

12 - 13 November

AC Hotel Kingston
Kingston, Jamaica

Hosted by the IEEE Jamaica Section

Why Run an IEEE Technical Conference

25 August 2025

Tiziana Tambosso - IEEE R8 VC-Technical Activities

ieee.org

Advancing Technology
for Humanity

The professional home for the engineering and technology community worldwide

Agenda

▸ Reasons to Run a Conference

▸ Timing

▸ Goal Setting
- Quantitative
- Qualitative

▸ Getting Started

Why Run a Conference?
Goals and Objectives

IEEE

▸ To Benefit Humanity
- Advancing engineering and technology
- Create forums for idea sharing and discussion

▸ IEEE Growth
- IEEE brand exposure, growth and relevancy
- Sustaining IEEE Xplore® as a premier content source

▸ Operating surplus

▸ Recurring IP revenue
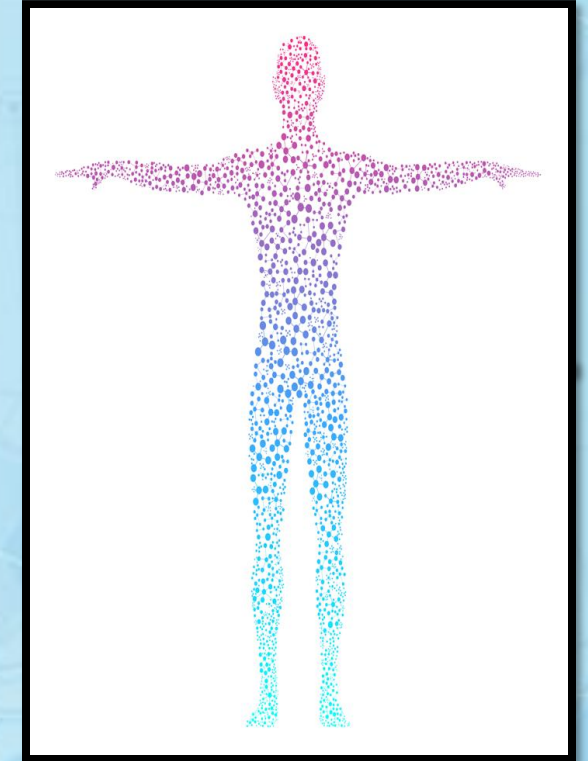
Why Run a Conference?

Goals and Objectives

IEEE Organization Units (OU)

▸ Organization Unit Vitality
- Generate operating surplus
- Reach potential new members
- Create member engagement opportunities
- Provide collaboration opportunities with other groups
- Enhance the awareness, credibility and esteem of OU

▸ Organizers
- Skill building
- Provide opportunities for others
- Give back to the community
- Fun

Why Run a Conference?

Goals and Objectives

Individuals

▸ Share their work with peers and obtain feedback

▸ Become published and recognized for their work

▸ Connect with colleagues and the community

▸ Identify potential collaborators

Conferences Matter to IEEE

▸ Conferences are vital to IEEE

▸ Conferences provide major financial contributions to IEEE

▸ IEEE conferences contribute much of the content to IEEE *Xplore*

▸ And 2300+ opportunities for member engagement

▸ Conferences are also a major sources of risk to IEEE – financial, legal, quality and reputational

▸ Conferences require significant volunteer attention and effort

▸ OU leadership support and oversight is essential

Getting Started

ieee.org

Getting Started: Review Event Fundamentals

Need to Run a Conference	New Research to Share or other OU Goal / Provide opportunities for members
Who is the Audience?	Define Target Market and Event Scale Local, Regional, Global
Building Your Team	Committee Development Size, Geography, Balanced Representation - Experience
Financial Plan	Understand Resources Required Draft Budget – Determine Breakeven, Allow for Surplus
Who will you work With?	Sponsor Evaluation IEEE Organization Unit and Non-IEEE Organizations
Timing	Market Analysis Best Time to Host / Avoid Competition
Develop Organizational Structure	Conference Size - Determine Need ADCOM - Steering Committees

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Goal Setting

You Can't Manage it, if You Can't Measure it...

Goal Setting - Quantitative
Examples

▸ Number of papers submitted, acceptance rate (#,%)

▸ Number of attendees, authors, exhibitors, patrons, reviewers, volunteers

▸ Surplus returned to IEEE ($)

▸ OU Engagement - # of IEEE members involved in conference/on committee

▸ New IEEE memberships (#)

▸ Develop new list of potential attendees

▸ Industry representation (%)

▸ Women representation (%)

▸ Young Professionals (%)

▸ Press coverage, articles published, social media activity

Goal Setting - Qualitative

Examples

- OU learning and skill attainment
- Overall event quality
- Outstanding Networking Events
- Prominence of Keynote/Invited speakers/Esteemed Reviewer
- Prestigious Sponsors
- Professional development, Learning Labs
- Site tours, social and student activities
- Effective sponsor coordination and working relationships
- Food and beverage, event execution
- Cutting edge topics
- Highest quality conference proceedings
- Social Media Buzz

Pick a Subset and Focus

Develop Your Financial Plan

- ‣ Financial Planning
    - **Draft budget – determine breakeven, plus with surplus**
        - This helps you evaluate if you need a sponsor, which can bring additional attendees
    - Acquire loan-seed monies – Section/Region
    - Project results
    - Identify areas of concern

- ‣ Define Conference Tool Set
    - Financial Management
    - Paper management
    - Paper Format
    - Copyright Collection Registration
    - Plagiarism Screening

Conference Strategies

CRITICAL THINKING

▸ **Develop a Detailed Conference Plan**
- Define the conference point of difference, what makes your event unique?
- Goals and objectives

▸ **Create the Management Plan and Structure**
- Evaluate the number of people required to execute conference
  - # reviewers, skill of reviewer
  - experienced and learning members
- Identify candidates for key roles
  - Can they work together?
  - Do we have the skills to achieve the plan?
  - Do we need help? What type? How much?

Section Leadership Role Conferences

ieee.org

IEEE
Advancing Technology for Humanity

Leadership in Section Sponsored Events

Your role in Conferences as a Section Leader

▸ Review & approval of all conferences sponsored by your Section

▸ Ensuring quality of any conference cosponsors

▸ Technical content quality

▸ Ensuring a sound financial plan

▸ Engagement in the approval process with CEE

▸ Synergies with IEEE Society fields of interest

▸ No conflict with other conferences in timing and naming

▸ Adequate resources identified

▸ IEEE Brand Protection

OU Approval – Financial

▸ IEEE Organizational Units are ultimately responsible for the financial and technical accountability of their solely sponsored and co-sponsored conferences, *therefore they must also approve the conference budget prior to submission to IEEE CEE for approval*

▸ Criteria for organizational unit approval should include:

  ▸ Sound financial planning

  ▸ Effective event planning principles

  ▸ Benefit to the membership

  ▸ No conflict with other conferences

  ▸ Technical content quality

  ▸ Adequate OU resources - financial and people

  ▸ IEEE brand protection

Key Steps

▸ **Identify Partners**
- Co-Sponsors
- Review and vetting process to determine suitability
  • Understand roles, responsibilities and working relat
- Contributors / Exhibitors
- Volunteers

▸ **Implementation Planning**
- Location and venue needs
- Communications and marketing
- Registration
- Event logistics

▸ **If you need help, contact CEE**

Get to Know your Leadership Teams

Due Diligence – Team Building

- It is best to conduct due diligence when building your team
- Review of past accomplishments
- Review of past roles
- Discuss with peers on volunteer soft skills and interactions
  - communications, written/spoken, reliability
- Does the volunteer have the time – a key question that should always be asked
  - Provide estimated weekly workload in hours (example: 15 hrs/week typically)
- Confirm the volunteer is in good standing as it relates to publishing and conference management
  - Contact CEE to verify individuals are not on the prohibited authors list (PAL) or the prohibited organizer list (POL)

Summary

- Planning process begins 12 to 18 months in advance of conference date for conferences less then 200 attendees

- Goal setting is critical

- Take the time to define your target market, it will impact success, develop a detailed conference Plan

- Team Building is extremely important, create a strong management plan and structure

- Evaluate the number of people required to execute conference
  - # reviewers, skill of reviewer, experienced and learning members

- Develop a daft budget to determine breakeven, as it will help you evaluate if you need a sponsor, which can bring additional attendees

IEEE Governance and Oversight

ieee.org

The professional home for the engineering and technology community worldwide

IEEE Policy Shapes Conference Activity

IEEE Policies

- IEEE Policies Section 10 contains the policies within which all IEEE conferences are to be governed

- https://www.ieee.org/documents/ieee_policies.pdf

MGA Operations Manual

- The IEEE Member and Geographic Activities Operations Manual also provides detailed information regarding IEEE Member and Geographic Activities (MGA) governance, policies, geographic unit operations, and committee reporting structure, including conferences

- https://mga.ieee.org/board-committees/operations-manual

IEEE Sponsorship opportunities, approval process, and the role of Section Conference Coordinators

25 August 2025

Filippo Sanfilippo

IEEE R8 Conference Coordination Committee member

ieee.org

IEEE Conference Sponsorship Types

ieee.org

The professional home for the engineering and technology community worldwide

Benefits of IEEE Conference Sponsorship

IEEE approved conferences can access valuable resources:

- Ability to utilize the IEEE brand & logo to promote your conference
    - *Only after approval and within IEEE brand guidelines*

- Inclusion in IEEE Conference Search and IEEE Call for Papers Search so authors and attendees can find your conference

- Opportunity to apply to the IEEE Conference Publication Program for potential inclusion in IEEE *Xplore*

- Insurance Liability coverage
    - *Financially sponsored conferences only*

- IEEE Conferences, Events & Experiences (CEE) Staff Guidance and Support

Benefits of IEEE Conference Sponsorship

IEEE approved conferences access valuable resources:

- ‣ Access to valuable FREE organizer services
    - IEEE eNotice Service - email marketing tool to reach your target audience to send out call for papers or other announcements
    - IEEE Member Verification Data - enables conferences to check attendee membership status
    - Publishing tools -
        - SimilarityCheck plagiarism screening
        - PDF eXpress paper formatting
- ‣ Member Benefits - conference sponsorship provides opportunities to engage Section members to get involved in conferences.
    - Volunteers can develop new skills - budgeting, meeting planning and marketing, etc.
    - Authorship and peer review
    - Networking opportunities with peers and sponsor organization members

Conference Sponsorship Types

IEEE Conference sponsors must include: 1) at least one IEEE Organization Unit (OU) and 2) IEEE

Financial Sponsorship Types

Sole Sponsorship

- **Exclusively one OU** involvement in the Conference

- Responsible for technical, financial, publicity and administrative aspects of conference

- OU will receive surplus or be liable for any deficit

- IEEE owns conference name, slogan, copyright for publications, Internet domain and logo

Financial Co-Sponsorship

- Shared involvement among several organizations **with at least one IEEE OU and IEEE**

  - Other possible co-sponsors: IEEE OUs, and Not for Profit non-IEEE organizations

- Shared responsibility for the technical, financial, publicity, and administrative aspects of conference

- Owners will receive surplus or be liable for any deficit

- OUs provided option for no cost exhibit booth, table, or other means of promoting IEEE membership and activities

Accepted papers that meet quality standards and conference presentation guidelines, will be eligible for inclusion in the IEEE Conference Publications Program (CPP) – not guaranteed for publication.

Conference Sponsorship Types

Technical Co-Sponsorship – General Definition *(IEEE & Non-IEEE Financial Sponsor)*

- ‣ IEEE OU has **NO financial involvement** in the conference
- ‣ **IEEE OU is responsible for participation in the technical program**
- ‣ IEEE OU should encourage members to submit papers and attend the conference
- ‣ Relationship between sponsoring organizations will be defined in a Memorandum of Understanding (MOU), as part of the Conference Application process

Conference Sponsorship Types

Technical Co-Sponsorship of a <u>non-IEEE Conference</u>

- ▸ IEEE OU has NO financial involvement in the conference
- ▸ IEEE OU is responsible for the technical program
- - Ensure that only high quality and appropriate scope is included
- ▸ IEEE OU should encourage members to submit papers and attend the conference
- ▸ Relationship between sponsoring organizations will be defined in a Memorandum of Understanding (MOU), as part of the Conference Application process
- ▸ **The IEEE organizational unit should have the option of a no cost exhibit booth, exhibit table or other ways to promote IEEE membership and activities during the conference**
- - **Technical co-sponsorship <u>does not guarantee</u> that the papers accepted for presentation at the conference will be eligible for inclusion in the IEEE Conference Publications Program (CPP)**

Technical Co-Sponsorship

Why do many non-IEEE organizations request Technical Co-Sponsorship of their conferences?

The IEEE brand brings instant credibility to that conference

Protect The IEEE Brand

- IEEE cannot be used in the conference title
- IEEE or IEEE organizational unit brand or logo may be used in conference publications and promotional material

TCS Fee Overview and Background

▸ A Technical Co-Sponsor (TCS) is an IEEE organization which has no financial stake in the conference but has a significant role in the technical program.

▸ IEEE TCS conferences can provide a way for conference papers to be considered for publication in IEEE *Xplore*.

▸ IEEE assesses fees for technically co-sponsored events to recover IEEE costs associated with providing organizational support for conference applications and content processing.

▸ The TCS fee is $1,450 per event plus $22 for each paper for all IEEE OUs
  - For Geo-Units (Chapter, Region, Section) TCS conferences, the fees apply when the MoU creation started 1 January 2023 and later

  - *If the non-IEEE financial sponsor has a National Society Agreement with IEEE or a Sister Society Agreement with one or more of the IEEE Societies, MoU will pay those fees*

For Profit and Business Participation in IEEE Conferences

For Profit Businesses cannot participate in the ownership - surplus/deficit or management of the conference. There are options in engaging with this type of entity; contact CEE for more information.

Contribute
Funds or services in exchange for specific assets/exposure

Naming Convention →

Contributor
Supporter
Sponsor
Champion

Sponsor
Lunch, Tea, Dinner, provide panelists, speakers, special multimedia activations, announcements, etc. Contact CEE for more information on sponsorships and exhibits.

For marketing purposes, websites, collateral, flyer etc.

IEEE Region 8 | IEEE

Recommendations for Conference Organizers

▸ Don't be the same person with several roles: sponsor signature, conference chair, conference treasurer, etc.

▸ Check the societies websites: Some societies asks for prior approval before submitting the conference application

▸ Use a paper professional submissions and reviews platform

▸ Develop an international technical program committee

▸ Check the plagiarism of submitted and accepted papers via https://crosscheck.ieee.org/

▸ Conference application should clarify how the IEEE sponsors are involved in developing the conference program

Recommendations for Conference Organizers

- Registration discounts for IEEE members

- Compliance with IEEE Policy

- Cooperate with your IEEE Section and related technical chapters in the host country

- Involve IEEE student volunteers in the local arrangement committee

- Foster the Academia – Industry relation

- Include WIE, YP, Entrepreneurship, Educational, Standards, and Humanitarian activities/workshops

- Consider Diversity, Equity, & Inclusion

IEEE Conference Application & Approval Processes

ieee.org

IEEE

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for Humanity

Overview/Quick Tips

Outreach to potential IEEE Sponsors **18 months** prior to the event start date

Submit the IEEE Conference Application to IEEE CEE at least **12 months** before the conference

Provide detailed information requested in the Conference Application
- Include your sponsors & how they are involved in the technical program
- Accuracy of the peer review & technical program inquiries

Overview/Quick Tips

▸ Co-Sponsors

- Know your Sponsors - Evaluating sponsors is critical and requires due diligence and time (MORE later)

- Ensure Co-Sponsors meet IEEE policy requirements

- Be sure that representatives of the non-IEEE sponsors have the legal authority to provide decisions on behalf of those organizations.

▸ MGA Geo-Unit Sponsors

- Ensure MGA policy alignment – MGA Sponsors *(Chapters/Student Branches) are expected* to inform their "parent" to eliminate delays or declines in Concurring Approval decisions

- Obtain Cross Endorsement, if applicable

Conference Approval Process in IEEE – Conference Application Checklist

icx_required_information_checklist.pdf

‣ Before starting the IEEE Conference Application:

‣ Review the conference application **Checklist**

‣ Policy 10 requires IEEE conferences to complete and submit an IEEE Conference Application, at least *12 months prior to the event date*

IEEE Conference Application Checklist

Before starting your IEEE Conference Application, review the conference application checklist. Each step of the registration process is clearly identified by topic. By gathering the information before your start, you can fill out your application more quickly. If you don't have all the information at once, you can save your application and return later to complete it.

Step 1 – Submitter Information

☐ Submitter name, email and phone number

Step 2 – About the Event

☐ Conference name and acronym
☐ Event type, location
☐ Conference Web site URL and keywords
☐ Start and end dates
☐ Scope and fields of interest
☐ Estimated attendance
☐ Estimated number of exhibits

Step 3 – About the Location

☐ Venue Name and address
☐ Venue contact name, address and phone number

NOTE: At this point, you have the ability to save your IEEE Conference Application and return later to

Conference Approval Process in IEEE – Conference Application Submission

▸ **Conference Education Resources (Videos) illustrate:**

- How to start a new application?

- Complete an application

- Find the status of a submitted application

IEEE - Conference Application

IEEE Conferences Events & Experiences

https://events.ieee.org/
events@ieee.org

IEEE Conference Application

Thank you for visiting the IEEE Conference and Event Registration page. This application allows you to officially register your conference or event with IEEE. By completing the registration form you are taking significant steps toward planning a successful conference/event. Registration for your conference/event will take approximately 20-30 minutes to complete and you will need specific information. In order to access and/or submit the IEEE Conference Application, you'll need an IEEE Web Account. To sign in or to create an IEEE Web Account, please click here.

Now is the time to gather some of the critical information that is required for the application such as: conference title, dates, location, website URL, IEEE/Non-IEEE sponsorship, technical program plans, vendor information and contacts.

If you are still in the planning process or would like assistance with submitting your form, please contact the Customer Relationship Management team at ieee-crm@ieee.org and we will be delighted to help you with any of your conference or event needs. The CRM team can assign a mentor to your program to help you.

In order for your conference application to be approved, you will need approval of one or more IEEE Sponsors. Please visit the IEEE Societies and Communities home page: https://www.ieee.org/communities/index.html for more information on possible sponsors. If you need help, please contact us at ieee-crm@ieee.org.

The IEEE Conferences, Events & Experiences team is committed to working with you to plan a successful conference or event. Here's wishing you the best of luck in your planning!

  - IEEE Conferences, Events & Experiences @IEEE. Why Conferences Matter - Find Your Community.

I want to

Start a new application: Start

Complete an application I started: Enter conference record number   Continue

To check the progress of your submitted application please visit the IEEE Conference Application Status Tracker

>Please read the IEEE Privacy Policy, and the IEEE Data Access and Use Policy.

Region 8

Conference Approval Process in IEEE – Conference Application Steps

Step 1

Submitter Information
- Who is submitting the form

Step 2

About the Event
- Event name & acronym
- Dates
- Registration System
- Conference Website
- Keywords, Scope, Field of Interest
- Estimated Attendance
- Location

Step 3

About the Location
- Venue details

Step 4

Conference Sponsors
- Sponsor name – drop down of Conference Sponsors (pick IEEE OUs from dropdown)
- Unlisted Sponsor Name – to be used if Sponsor is not listed in dropdown, typically for non-IEEE new sponsors
- Owner of the Conference name
- Conference Committee Responsibilities

‣ **Step 5: Technical Program**
  - Publication & Copyright details
  - Interest in *Xplore* inclusion *via the Conference Publication program*
  - Structure of Technical Program
  - Review plans
  - Call for Paper Website
  - Call for Paper dates

‣ **Step 6: Conference Contacts** *(name, email & address for contacts)*
  - Conference Chair *
  - Information Contact*
  - Conference Treasurer/Finance Chair* – *required on all IEEE Financial conferences*
  - Publication Chair
  - Technical Program Chair
  - Committee List - *You can upload a list of committee members in any file format.*

‣ **Step 7: Comments**
  - Include any additional information that you feel is pertinent to the conference
  - Preview the application submission & print
  - Submit

Region 8

IEEE

Application was submitted...now what?

Upon submission a conference ID number is assigned, which is used throughout the planning & publication process and helpful in checking status

IEEE CEE reviews information provided by organizers

CEE staff will reach out to organizers if there are questions on the application submission

For TCS conferences, CEE will contact the IEEE Sponsor leadership to obtain the TCS Fee Decision. TCS Fee Memo or confirmation of decision is sent

Once the CEE review is complete a Sponsorship Approval Request or MOU is sent to the sponsor(s) for decision

Most common delays with application processing

- Missing/incomplete information on application
- Application submitted less then 6 months from the conference date
- The sponsors or "parent" is not aware of the conference
- Technical Co-Sponsor Fee decision delays
- Representatives listed for non-IEEE sponsors do not have authority to enter into an agreement for the organization

Conference Approval Process in IEEE – View Conference Status

Application Status - IEEE CEE

Sponsor Information	MOU Approval Status
MOU Signatory 1:	Pending Approval
IEEE Industry Engagement Committee (0.00%)	
MOU Signatory 2:	Pending Approval
IEEE Industry Applications Society (0.00%)	
MOU Signatory 3:	Pending Approval
IEEE Vehicular Technology Society (0.00%)	
MOU Signatory 4:	Approved
IEEE Technology and Engineering Management Society (TEMS) (0.00%)	
MOU Signatory 5:	Pending Approval
IEEE Industrial Electronics Society (0.00%)	
MOU Signatory 6:	Approved
Region 08 - Europe,Middle East,Africa (30.00%)	
MOU Signatory 7:	Approved
Italy Section (10.00%)	

Concurring approvals don't appear in the conference status – they are managed outside of the conference application

‣ To check who are the sponsors which already approved:

https://www.ieee.org/conferences/organizers/conf-app.html

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Sole Sponsored Approval Request

▸ If a Sole Sponsored conference a Sponsorship Approval Request is sent to the IEEE OU Leadership
  - Chair
  - Vice Chair
  - Secretary
  - Treasurer

▸ IEEE OU Leadership can view details of the conference application prior to making their decision by clicking on Conference Details link

▸ IEEE OU Leadership can then provide their decision on sponsoring the event by clicking the applicable link

▸ Once approval is received by CEE the conference application is approved

Co-Sponsored MOU Approval Request

▸ If a Co-Sponsored conference, the MOU Request for Approval is sent to all sponsors for a decision

▸ MOUs sent to IEEE OU(s) are sent to leadership roles
  – Chair
  – Vice Chair
  – Secretary
  – Treasurer

▸ Sponsors can view application details prior to making their decision by clicking on the Conference Application link in the email or MOU

▸ Sponsors can provide their sponsorship decision by clicking the applicable MOU link

Providing a Decision on Sponsorship Opportunities

Adding sponsors or other updates to the MOU implies all sponsors having to approve agreement again.

Approve | Assistance / Information Needed | Decline

Signatory Name:*
Signatory Title:*
Signatory Email Address:*

Send

Three options
1. **Approve**
2. **Decline**
3. **Assistance/Information Needed**

MOU Sponsor Decisions Received

▸ Memorandum of Understanding (MOU) is fully executed upon sponsors approval and sent to sponsors & organizers for their records

▸ CEE approves the Conference Application

▸ Approved conference appears in the IEEE Conference Search

Section Conference Coordinator (SCC) – Role

‣ A Volunteer position within an IEEE Section responsible for overseeing conferences and technical events organized in the Section

‣ Appointed by the Section Chair

‣ A volunteer who have an IEEE conference organizer experience

Section Conference Coordinator (SCC) – Key Responsibilities

Support the section in organizing its conferences

Ensure conferences meet IEEE requirement

Foster collaboration among local chapters, other IEEE sections, and external

Review the TCS/FCS applications that involve the Section and its chapters

Ensure post-conference reports and feedback are collected to evaluate success and areas for improveme

Support conference organizers in the Section

Key Responsibilities

Coordinate with R8 CoCC

Section Conference Coordinators (SCCs) – Benefits of involving SCC in Conferences

‣ Ensures adherence to IEEE guidelines and processes

‣ Provides expert advice and mentorship to new conference organisers

‣ Facilitates networking opportunities with IEEE Chapters of the Section, other IEEE Sections and partners

TCS/FCS of R8 – Benefits and Requirements

25 August 2025

Ahmed Hassan Yousef
IEEE R8 Conference Coordination Committee member

R8 Flagship and Portfolio Conferences

Flagship conferences:

MELECON: every two years (even years), held in one of the Mediterranean Sections

ENERGYCON: every two years (even years), about energy topics, held anywhere in R8

EUROCON: every two years (odd years), held in a European Section

AFRICON: every two years (odd years), held in an African Section

Portfolio conferences:

RTSI: annual, Research and Technologies for Society and Industry, held anywhere in R8

IHTC: annual, Humanitarian Technologies Conference. It is Multi-Regional (R7, R8, R9)

HISTELCON: every two years (odd years), about history of electrical technologies, held anywhere in R8. From 2026 will become annual and Multi-Regional (R7, R8, R9, R10)

http://flagship-conferences.ieeer8.org/

Multi-Regional Conferences

❖ R8 Portfolio conference category

❖ Cooperation among two or more regions

❖ A MoU must be signed with specific financial and organizational agreements

❖ The conference will tourn around the regions.

❖ Conferences with an inter-disciplinary and specific purpose

IHTC - International Humanitarian Technologies Conference

is a Multi-Regional Conference Series rotating between R7 (Canada), R8 (Africa, Europe and Middle East), and R9 (Latin America and Caribbean).

This inter-disciplinary conference series focuses on showcasing challenges, success stories, lessons learnt, case studies and technological innovation related to achieving the UN Sustainable Development Goals (SDGs), ICT4D (ICT for Development, bridging the digital divide) and the application of Humanitarian Technologies (including Disaster Relief and Disaster Recovery) and facilitating engagement by stakeholders from the public, private, education and research and societal sectors around the world.

HISTELCON – HISTory of ELectrotechnology CONference

is going to become a Multi-Regional Conference Series rotating among R7 (Canada), R8 (Africa, Europe and Middle East), R9 (Latin America and Caribbean) and R10 (Asia Pacific).

This conference is the only one in the IEEE that addresses the history of technology and its implications for modern society, industry and education. With the TCS of the IEEE History Committee and the IEEE History Center.

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Benefits for R8 Conference Sponsorship

	Flagship	Portfolio	FCS	TCS
Repayable Loan -seed funding (to be returned after conference closing)	USD 5k	USD 5k		
R8 Steering Committee	X	X		
Guidance of the organizing committee (by an assigned CoCC liaison member)	X	X	X	X
E-notices to R8 members	5	5	4	3
R8 media publicity (R8news, social media, R8Today, …)	X	X	X	
Organizing side R8 CoCC workshop/session/meeting	X	X		
Assistance for conference Application/MoU	X	X		
R8 Director participation in the opening session	X	X		
Participation of a R8 CoCC representative	X	X	X	
IEEE R8 booth	X	X		
Announce conferences in R8 website	X	X	X	X
Organizing special events in cooperation with R8 Committees (SAC, YP, WIE, AfI, etc.)	X	X$^{\#}$	X^{+}	
Free plagiarism check provided by IEEE	X	X	X	X
IEEE Web hosting and IEEE domain for the conference website and email address provided by IEEE for each flagship/portfolio conference	X	X		

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Requirements for R8 Conference Sponsorship

	Flagship	Portfolio	FCS	TCS
Region 8 FCS (%)	>=30%	>=30% *	>=5%	0%
Local Organizing Section FCS (%)	>=50%	>=50% *	>=5%	
Local OU officer(s) involved as program committee co-chair(s)	x	x		
R8 Senior/Fellow members involved as conference co-chairs (CC), technical program co-chairs (TPC), program committee (PC) members	all CC and TPC	all CC and TPC	at least 1 CC, 1 TPC, 5 PC	at least 1 TPC, 5 PC
Program committee members from different R8 countries	x	x	x	x
Progress meetings of the organizing committee with the R8 CoCC representative (liaison)	Monthly	at least 4	at least 2	email
Involvement (FCS/TCS) of local Section and at least two local Chapters (or Societies / Councils/ IEEE Technical Communities/IEEE OUs) in the conference field	x	x	x	x
Free Registrations for R8 representatives (including R8 student paper contest – SPC) that conference must provide	Up to 8	Up to 4	Up to 2	1
Submit R8 Conference Final report (link)	x	x	x	x
Previous R8 involvement	NA	at least 1 edition as R8 FCS	At least 1 edition as R8 TCS	
Promote the R8 Voluntary Contribution Fund (VCF)	x	x	x	

Role of R8 steering committee of R8 flagship/portfolio conferences

Main topics

Steering Committee's role – in general

Continuity in Technical Program

How to use the statistics

How to motivate the Organizing Committee

Conference attendees' experience

Lessons learned from the past

Steering Committee's role – in general

▸ The role of the R8 Steering committee is to give support and guidance to the Conference Organizing Committee providing strategic direction and oversight and working on list of best practices and lessons learned for that specific conference (each Flagship/Portfolio conference has its peculiarities).

▸ This list shall be useful for the present and future organizers with the main goal of ensuring a standard level of quality and a continuous improvement of conference results (number of attendees, high technical quality, industry participation, involvement of students, YP, WIE, positive feedback by participants)

▸ The list of best practices and lessons learned should be a living document enriched with multiple experiences of previous and present conference organizers.

Steering Committee's role – in general

Strategic Guidance and Oversight

- Provides strategic direction and oversight for flagship and portfolio conferences within IEEE Region 8.
- Ensures alignment with IEEE's mission and goals while catering to regional needs and priorities.

Quality Assurance

- Maintains high-quality standards for conferences through rigorous review processes and guidelines.
- Enhances the reputation of IEEE Region 8 conferences, fostering trust among attendees, authors, and sponsors.

Community Engagement

- Facilitates collaboration and networking opportunities among researchers, practitioners, and industry professionals.
- Fosters a vibrant community of experts, promoting knowledge sharing and interdisciplinary dialogue.

Global Impact

- Amplifies the visibility and impact of IEEE Region 8 in the global academic and industrial landscape.
- Attracts international participation, fostering cross-cultural exchange and collaboration.

Support for Local Organizing Committees

- Provides support, guidance, and resources to local organizing committees to ensure successful conference execution.
- Promotes collaboration and knowledge sharing among organizers across different regions and conferences.

Impact Measurement and Reporting

- Monitors and evaluates the impact and effectiveness of conferences through metrics and feedback mechanisms.
- Provides transparent reporting on conference outcomes and achievements to stakeholders and IEEE leadership.

Continuity in Technical Program

Core Topics and Keynotes

This highlights the essence of the conferences by showcasing the main technical themes and the esteemed speakers who contribute to the conference's prestige and relevance.

Symposia/Tracks Implementation

Demonstrating adaptability and responsiveness to emerging trends and attendee interests is crucial. This point emphasizes the dynamic nature of the conferences and their commitment to evolving with the field.

Feedback Integration

Incorporating feedback ensures that the conferences remain attendee-centric and continuously improve over time. It showcases a commitment to quality and responsiveness to participant needs.

Impact on Attendee Experience

Ultimately, the attendee experience is paramount. By highlighting the positive impact of core topics, keynotes, and symposia/tracks on attendee satisfaction, this point underscores the effectiveness of the conference's technical program.

Support for Organizers

Recognizing the support provided to conference organizers underscores the collaborative effort behind the success of the conferences. It also assures stakeholders of the commitment to maintaining excellence in technical program delivery.

How to use the statistics

Previous Conference Metrics

Number of papers submitted and accepted

Conference attendance figures

Industry participation and sponsorship levels

Publication and citation metrics for conference papers

Financial Performance

Total revenue generated from registration fees, sponsorships, and exhibitor fees

Breakdown of expenses by category (e.g., venue rental, catering, marketing)

Cost per attendee and revenue per attendee

Program Structure and Schedule

Analysis of session formats (e.g., keynote presentations, workshops)

Distribution of sessions across different tracks or themes

Duration and timing of sessions (e.g., length of sessions, breaks)

Participant Demographics

Geographic distribution of attendees

Affiliation types (e.g., academia, industry, government)

Trends in participant demographics and preferences over time

How to motivate the Organizing Committee

- ‣ Highlight the Core Team on the Website
- ‣ In-person meetings and social gatherings
- ‣ Empower team members to do their job
- ‣ Start with a smaller team
- ‣ Plan the budget for volunteers (accommodation, meals)
- ‣ Pre-conference activities
- ‣ Recognition and Appreciation
- ‣ Celebrating successes
- ‣ Continuous Learning and Growth Opportunities

Conference attendees' experience

Early expectations based on the website	Length of the conference, number of tracks	Registration fees and services	Paper acceptance notification (on which day, what time)	Meal options and dietary restrictions
Accommodation options	Transportation assistance	Social program(s)	Sightseeing opportunities	Industry program
	Company tours	Post-conference resources	Interactive Exhibits and Demonstrations	Onsite Amenities and Services

Lessons learned from the past

▸ Encourage the Organizing Committee to contribute to the lessons learned file

▸ Collect new ideas during the preparation, implementation

▸ Intense communication with the last 2 teams

▸ Invite the previous organizers for online calls

▸ Take notes about what went well - continuously

▸ Allow the whole organizing committee to comment/add

▸ Resources by IEEE CEE (Conferences, Events & Experiences)

Upcoming R8 Flagship Conferences

▸ IEEE RTSI 2025
Gammarth Tunis (Tunisia)
August 24-26, 2025
https://2025.ieee-rtsi.org

▸ IEEE HISTELCON 2025
Bonn (Germany)
Sept. 30 – Oct. 2, 2025
https://2025.ieee-histelcon.org

▸ IEEE AFRICON 2025
Polokwane (South Africa)
Dec. 10-12, 2025
https://2025.ieee-africon.org

R8 flagship and portfolio conferences 2026

▸ IEEE RTSI 2026
Espoo (Finland)
August 17-19, 2026
Dates being slightly revised due to overlap with the IEEE SC2026 in Glagow-UK

▸ IEEE MELECON 2026
New Cairo (Egypt)
February 2-4, 2026
https://2026.ieee-melecon.org

▸ IEEE ENERGYCON 2026
Paris (France)
October 27-29, 2026

R8 flagship and portfolio conferences 2027

IEEE EUROCON 2027
Sarajevo, (Bosnia & Herzegovina)
9-11 June 2027

IEEE AFRICON 2027
Kumasi, (Ghana)
23-25 September 2027

IEEE RTSI 2027
Catania, (Italy)
6-8 September, 2027

IEEE IHTC 2027
Zagreb (Croatia)
17-20 November, 2027

Conferences, Experiences & Events (CEE)
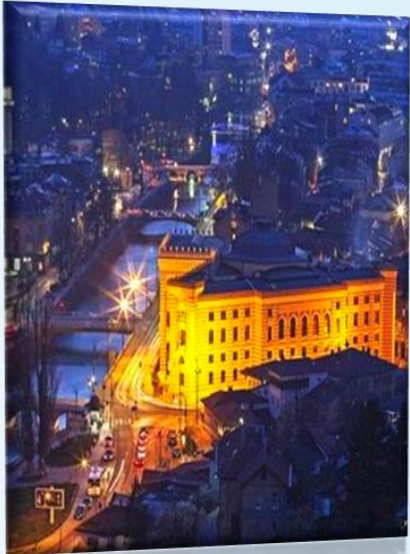
Conference Technical Program Overview

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IEEE R8 Conference Leadership Workshop
25 August 2025, Gammarth, Tunisia

A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity.

Conference Technical Program Overview

A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity.

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Agenda

- Managing the Conference Technical Program

  ○ The Role of the Technical Program Chair

  ○ Communication guidelines

- IEEE Conference Scope

- Peer Review

  ○ Team Building

- Plagiarism Screening

  • Similarity check

- Resources

Managing your Conference Technical Program

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The Technical Program Chair Manages the Peer Review Process for a Conference

- Ensure a well-balanced, high-quality program is organized and presented

  - The Technical Program Chair manages the Call for Papers through peer review and ultimate selection of every accepted paper, including non-presented paper and Plagiarism policies as set by IEEE and the Conference Chair

  - Recruiting/organizing/managing a Technical Program Committee and reviewer team

  - Coordinates scheduling of session locations/formats and determining needs for the local arrangements of the program

- Plagiarism Screening – Similarity check (Crosscheck)

  - **This is NOT a part of, or a substitute for, the Peer Review process!**

  - **Technical Program Chair should appoint dedicated person/people to handle the plagiarism screening process.**

PLAGIARISM

The Technical Program Chair's Role

- Discuss key learnings with prior Conference Technical Program Chair

  - What challenges were encountered? Were goals met?

  - Review technical areas from previous year. Determine if additional technical areas should be included or removed.

  - Were the reviewers overburden or was the workload acceptable?

  - What peer review tool was used and was it effective? Consult with CEE for recommendations if needed.

  - Which key contacts would you recommend for this conference's Technical Program Committee?

  - Did you utilize CrossCheck for plagiarism screening?

- Develop tracks when there are multiple, significant topics within the overarching conference scope

  - Assign a track chair if one is warranted

  - How many tracks did you have last year?

Structure

Chair

Technical Program Chair

Technical Program Committee (TPC)
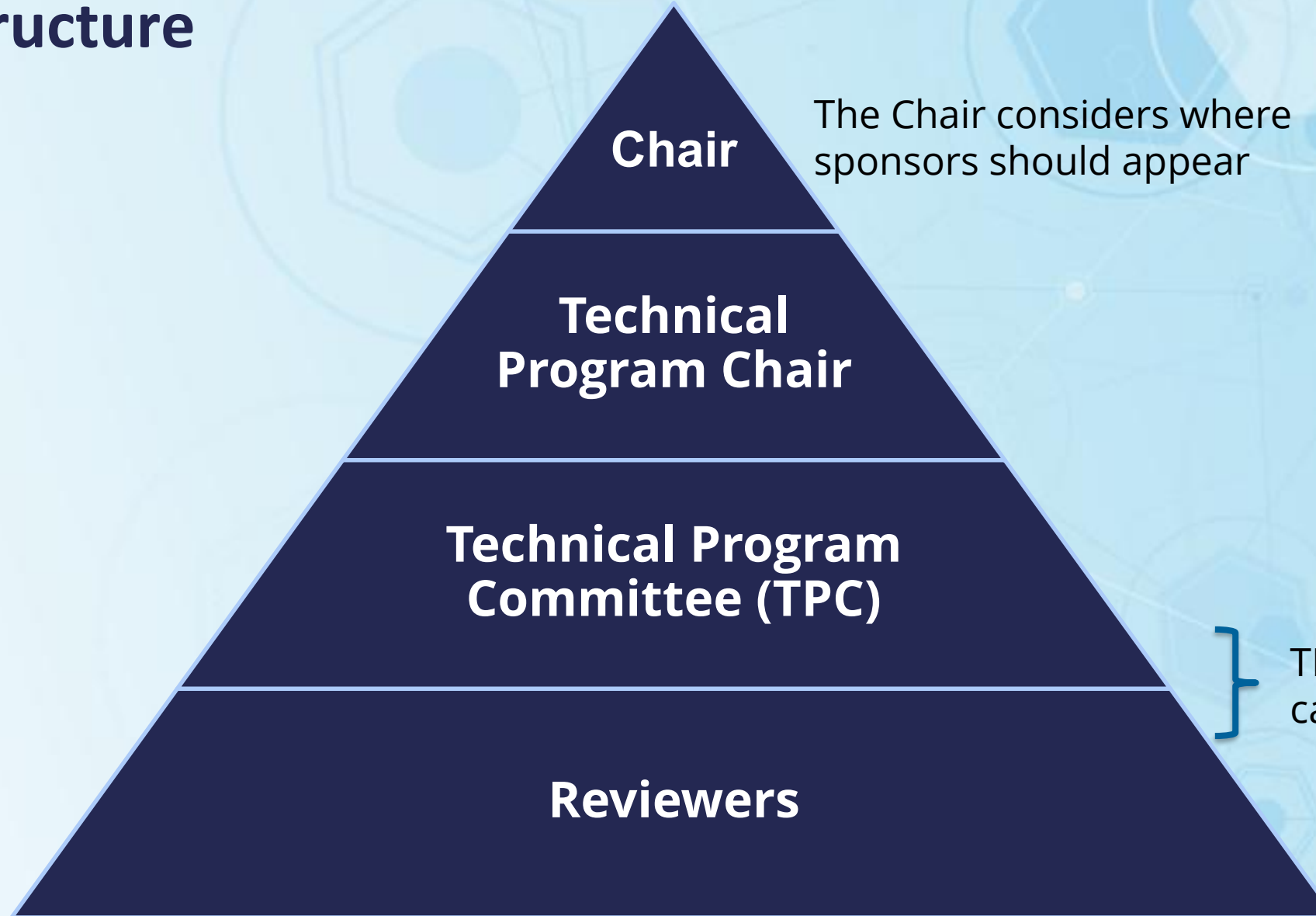
Reviewers

The Chair considers where sponsors should appear

TPC and reviewers can overlap

Technical Program Development

- Allocate and schedule time for all accepted papers

- **Plan 20 minutes per presentation***

    o **15 minutes for the oral presentation**

    o **5 minutes for answering questions**

- Typically. invited/tutorial speakers receive a longer presentation time

- Assign appropriate space to meet anticipated interest

- If planning a poster session, decide how many you want displayed & how (e.g., digital)

- Determine number of poster sessions and length of time for poster session/s. Most poster sessions run the time span of a regular technical session or longer.

- Sizing your peer review team will be covered later in this presentation

- * Or consider alternate formats that retain adequate time for presenters and the audience to interact

    o This can be done virtually

Technical Program

Peer Review Systems
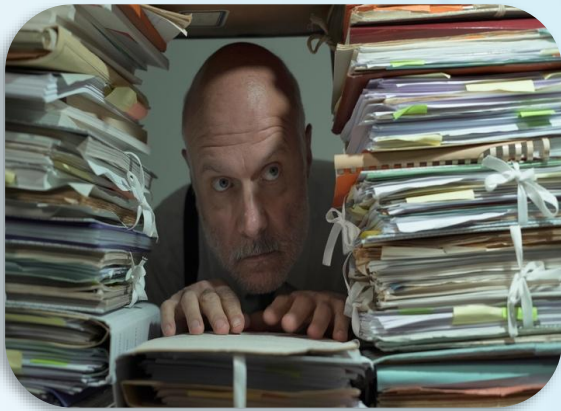
- Select a Peer Review, paper management system – check IEEE recommendations. Check in with Conference Chair if costs need to be covered in overall budget.

- Find out upfront if your peer review system has a mobile app if you require one

- Consider conference size and complexity

- Develop a non-presented paper policy

- Gain committee and chair agreement

- Communicate the policy in the call-for-papers and all author communications

- Make sure the IEEE sponsor is engaged in developing the technical program
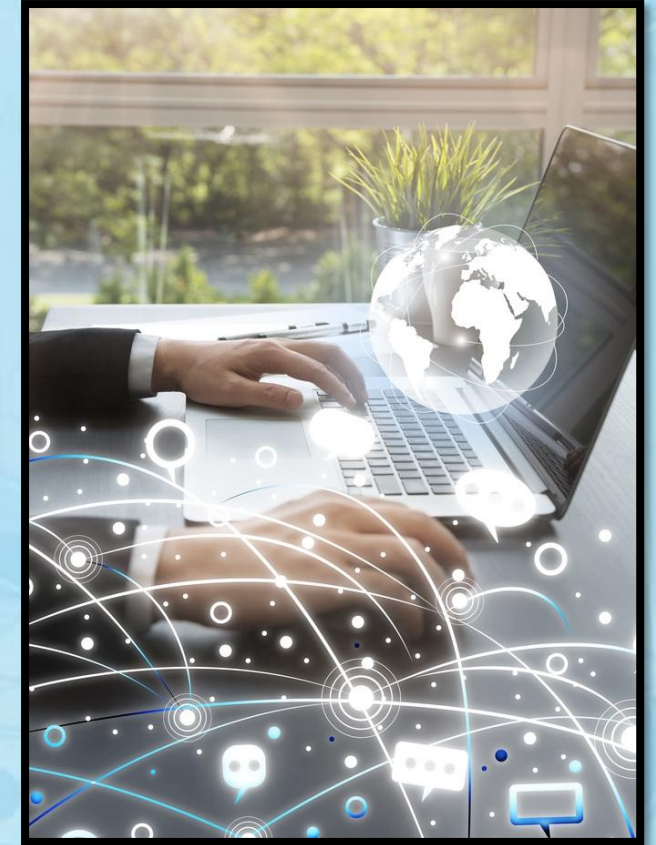
Get to Know Your Leadership Teams

Due Diligence – Team Building

- It is best to conduct due diligence when building your team

- Review of past roles, experience and performance

- Consider training and mentoring for those that may benefit

- Discuss with peers on volunteer soft skills and interactions

  - Communications, written/spoken, reliability, thoroughness

- Does the volunteer have the time – a key question that should always be asked

  - Provide estimated weekly workload in hours needed (example: 15 hours per week typically)

- Confirm the volunteer is in good standing as it relates to publishing and conference management

  - Contact CEE to verify individuals are not on the prohibited authors list (PAL) or prohibited organizer list (POL)

- Think about succession planning, so your TPC doesn't need to start from scratch each year

  - Let volunteers know that when joining the TPC they are expected to serve in the role for a certain amount of time. Reviewers are often required to serve a certain about of time before being promoted to topic/track chair or eventually serving as program chair.

IEEE Conference Scope

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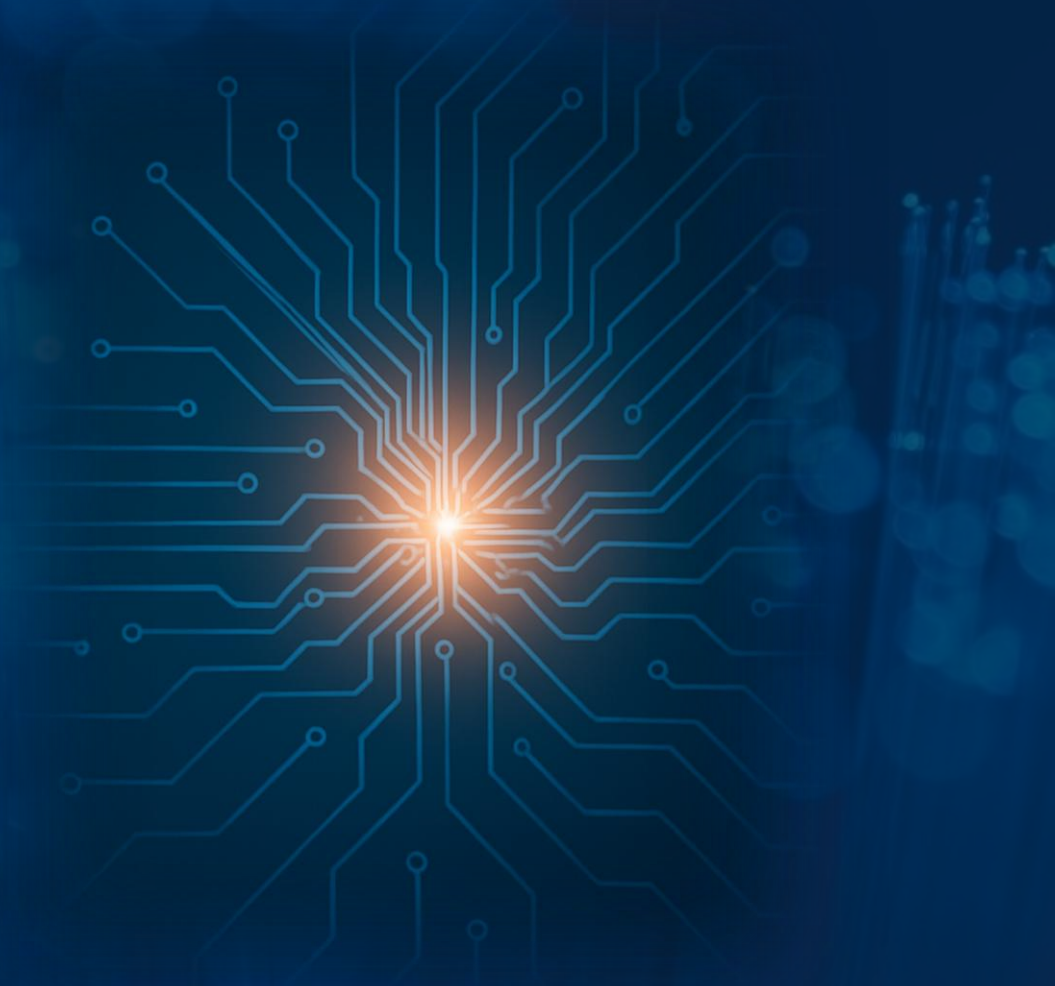
IEEE

Conference Scope

- IEEE is a technical publisher –

readers and commercial partners look for works in IEEE's technical areas

  - Each Society and Technical Council has a Field of Interest

  - Full listing: https://ta.ieee.org/operations/governing-documents

  - Additional guidance can be found in the "Aims and Scope" of IEEE Journals, found on each journal's page on *Xplore*

- Conference attendees expect content in the scope of the conference which may be more broad than technical areas

- **The conference's reviewers must be expert in the subject area of each paper they review**

  - Reviewer pools are developed for the technical scope of the conference

  - With a wide range of science disciplines included in your conference scope – do you have enough reviews for so many different topics? How will you handle related topics outside the field of IEEE?

Conference Scope & IEEE Scope

- The technical scope of the conference should have significant overlap with the technical scope of IEEE

- The conference scope that was approved by IEEE should be clearly stated in the conference promotional materials (e.g., web site) and should not change without permission from IEEE

- The papers that the conference sends for inclusion into IEEE *Xplore* must be within the scope of IEEE *Xplore*

How Content is Categorized in IEEE *Xplore* - Suitability

- Aerospace

- Bioengineering

- Communication, Networking & Broadcasting

- Components, Circuits, Devices & Systems

- Computing & Processing (hardware/software)

- Engineered Materials, Dielectrics & Plasma

- Engineering Profession

- Education Engineering

- Geoscience

- Nuclear Engineering

- Photonics & Electo-Optics

- Power, Energy Industry Applications

- Robotics & Control Systems

- Signal Processing & Analysis

- Transportation

- Fields, Waves & Electromagnetics

- General Topics for Engineers (Math, Science & Engineering)

Scope Boundaries

Gray Areas/Defined Relevance

- **Agriculture**
  - Intelligent systems or remote sensing
- **Architecture**
  - Control and electrical systems
- **Arts**
  - Intersection with engineering and/or impact of technology
- **Biology**
  - Related engineering in medicine
- **Chemistry**
  - Applicability to semiconductor processing
- **Economics & Finance**
  - Related to Engineering Management
- **Human Behavior & Sociology**
  - Related to Engineering Education or Engineering Management

Out-of-Scope

Gray Area

In-Scope

- **Logistics**
  - Related to Engineering Management or Intelligent Systems
- **Management**
  - Engineering or technical management
- **Mathematics**
  - Ensure applicability to engineering
- **Mechanics**
  - Related to MEMS or Robotics

How to Conduct the Peer Review Process
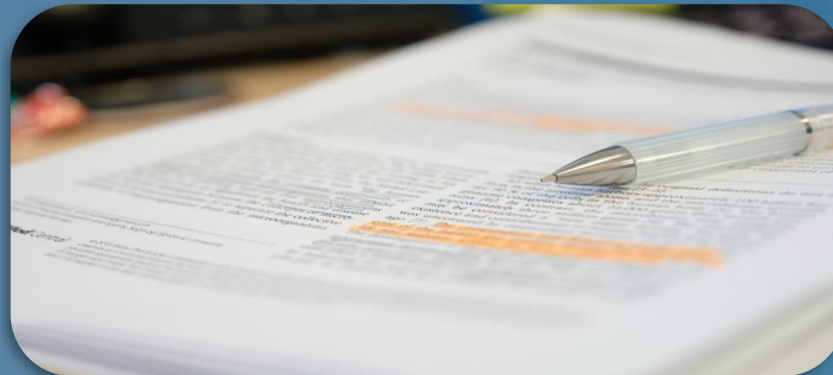
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What is Peer Review ?

- The process of evaluating a scholarly work by a group of experts in the same field to make sure it meets the necessary standards before it is accepted or published.

Common Types of the Review Process

- Single Anonymous Review
  - Reviewers' names are hidden from the author **Most Common**

- Double Anonymous Review
  - Reviewers' names are hidden from the author and author's names are unknown to the reviewers
  - The double-anonymous review process is intended to prevent bias (or the perception of bias) towards any author

Sizing Your Peer Review Team

- **Determine the number of reviewers required based on:**

  - Expected number of papers submitted

  - **Three reviews per paper (3)**

  - Define the maximum number of papers per reviewer
    - suggested: 12 full papers - maximum per reviewer
    - At least 4-week review time period

- Review previous conference history

- **Example:**

  - Anticipated full paper submissions = 200

  - Reviews per paper = 3

  - Total reviews = 600

  - Full papers per reviewer = 12

  - **Number reviewers needed = 50**

Assembling Your Reviewer Team

- Experience level – a mix

- Areas of expertise

- Geography mix

- Institution

- Industry/academic

Your goal is to have the reviewer pool reflect all those that may to submit a paper, including expertise.

Peer Review Process Systems

- The Technical Program Chair manages this process

  o Selects Paper Management System

- Papers are organized by topical areas

  o Match topics with reviewers' expertise

- Paper assignments are managed within a peer review system (same as paper management system)

  o Reviewers provide feedback to authors

  o Reviewers ultimately provide a final score for the paper and send it back to the Technical Program Committee (TPC)

- TP Chair monitors and communicates number of accepted papers / acceptance rates to the Conference Chair throughout the process

Verify the Conference Scope

- Reviewers should make sure that the **scope of the papers that they review are within the stated scope of the conference**

- Papers that are outside the scope of the conference should be rejected

Privacy: Reviewers Responsibilities

- Participants in the review process (i.e., referees and anyone else who is authorized to handle conference submissions) **shall treat the contents of conference submissions under review as confidential information not to be disclosed to others before publication**

- No one with access to a submission shall make any inappropriate use of the special knowledge that access provides

IEEE Publication Services and Products Board Operations Manual 2019

Conference Publications Policy: PSPB Operations Manual – 8.2.2.B (page 99)

Reviewer Questions

EXAMPLE: Paper Scoring Feedback

Result 1

Relevance to the conference	7	Technical strength	4
Originality	6	English writing	4
Overall	**5**		

Comment

This paper mainly shows us the test result of SVM (support vector machines) method, which is a new type of learning method based on statistical learning theory, for transient stability analysis of power systems. The result of the test has proved the superiority of the SVM method and more needs to be done to perfect this method.

The test program needs to be enriched based on the test result gathered. From the result of two tests we can see that in small scale of training and testing, the performance is perfect while in large scale test faults appeared. In this case, staged experiments needed to be conducted to find out the critical point of the test number and get to know the reason of fault appearance.

This is a good start for this kind of method, but more needs to be done to perfect this algorithm.

- Relevance to conference (**scope**)

- **Novelty**: is this original material distinct from previous publications?

- **Advancement**: is this a significant contribution to the field?

- **Validity:** is the study well designed?

- **Data:** interpreted and analyzed correctly?

- **Clarity:** are the ideas expressed clearly, concisely, and logically?

- **Compliance:** are all ethical and conference requirements met?

- **Format:** Which presentation format do you believe is most appropriate for this submission? (Oral vs. Poster)

- **Reviewers Confidence Score** - on a scale

  - Highest level: direct expert knowledge

  - Lowest level: general familiarity

Peer Review Process

- Considerations during process

  - Do I have enough submissions?

    - If No, do I need more promotion?

  - Do I have an adequate number of accepted papers?

  - Do I need any extensions?

- TP Committee validates that all reviews have occurred and develops three groupings of papers

  - Reject

  - Accept Oral

  - Accept Poster

  - **Maybe Accept**

Ongoing Challenges in Reviews

Critical role for the sponsoring OU!

Receiving enough high-quality papers by the submission deadline

Finding enough experts to provide quality reviews by the deadline

- Expert in the subject of the papers

- Consider prior year authors

- Qualified students can serve as reviewers

Managing conflict of interest.

- **Reviewers should recuse themselves from conducting a review if they interact closely with any of the authors or if any authors are from the same institution**

Reviewer Expectations
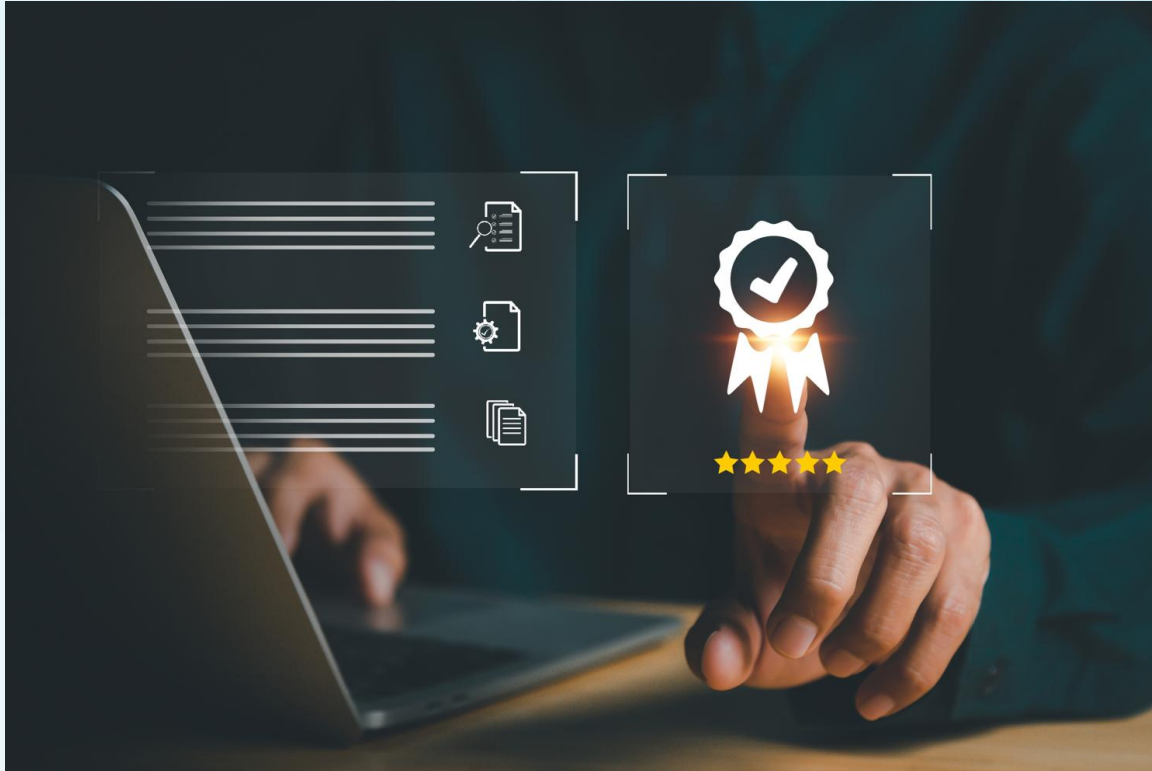
- Reviewers are experts in subjects of the papers that they review

- They provide a high-quality review and evaluation of the technical content

- They review and evaluate the presentation quality of the papers

- They are unbiased

- They make sure that the authors have met their responsibilities

Expert Evaluation of Submitted Papers

CrossCheck Portal

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

Intellectual Property Rights (IPR) Team

Tips

- IEEE has enabled use of the CrossCheck Portal as a stand-alone web application that can be used by any publications volunteer at any time.

- Save time by avoiding duplication of efforts

  ○ Coordinate your process before your get started, have dialogue with the IEEE IPR Staff to see if anything has changed

- Submitting content in a timely fashion is integral to your success

Plagiarism and Similarity

- IEEE defines plagiarism as the reuse of someone else's prior ideas, processes, results, or words without explicitly acknowledging the original author and source

  - It is a serious breach of professional conduct, with potentially severe ethical and legal consequences

- IEEE prohibits republication of substantially the same material, even by the same author(s)

- IEEE requires that all content be screened for possible plagiarism or republication

- IEEE provides all Publication Editors and Technical Program Chairs complimentary access to CrossCheck, a premier plagiarism detection tool

Crosscheck

Sample Similarity Report

Assign resources to
assist the
Technical Program
Chair if necessary –
**the reports requires a human
eye to review
and judge.**

**Each accepted paper must be
screened for plagiarism**

Similarity Check is Not Peer Review

Requires Interpretation
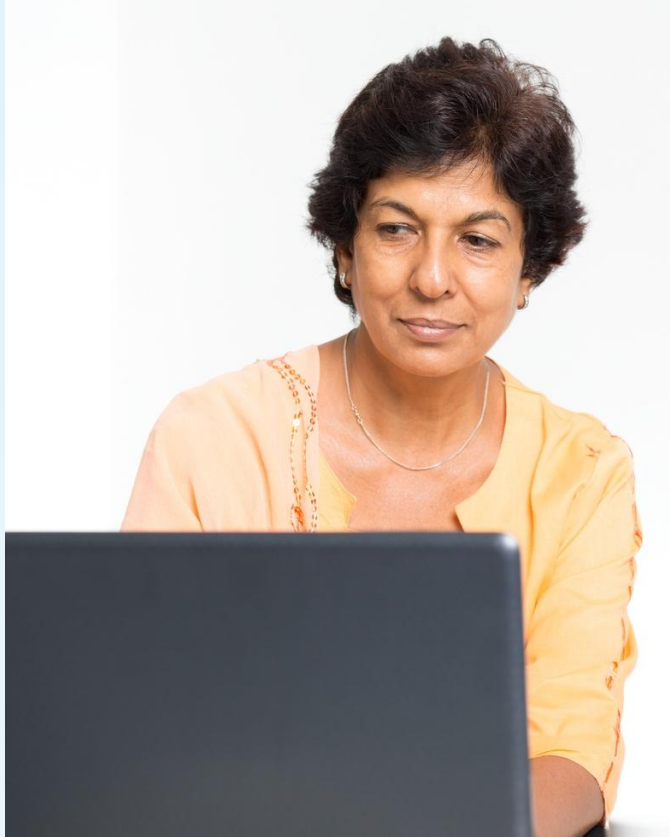
- The Technical Program Chair or designee manages CrossCheck and plagiarism reviews
  - needs coordination with Publications Chair
- Similarity Check does not replace the peer review process
  - Similarity screening is a separate function from the peer review process
- Subject matter experts must separately review the paper to determine suitability, novelty, quality and communication
- **Similarity scores are just that, they require human review and analysis**
- Similarity scores should not be the only basis for reject (or accept) decisions
  - **Similarity score should not be given as feedback to authors**
- Similarity Check can be used on IEEE-copyrighted content only

Similarity Check – When to use it?

- CrossCheck must be separate from the Peer Review process

- Options

  ○ Screen all papers before peer review

  ○ Screen accepted papers immediately after peer review

  ○ **Conduct two screenings** - the first screening is **before peer review**; and the 2nd screening is upon receipt of **final paper submission** (this is after acceptance has gone out and the author needs to submit a final paper for publication).

  ○ Screen papers in parallel with peer review (not ideal)

  ○ Screen papers after the conference (only as a last resort)

Final Decision

Accepted Papers

Acceptance Rate

There is no Universal Standard
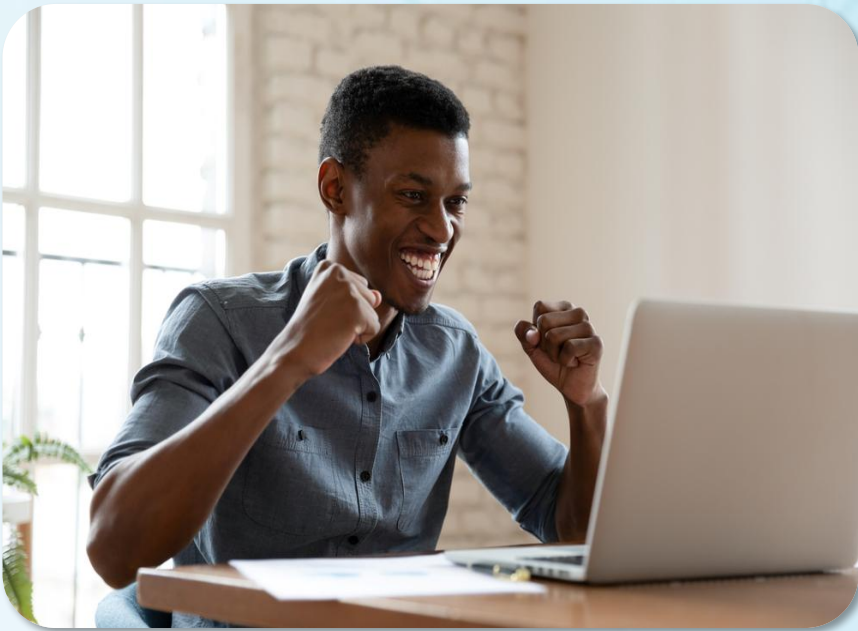
- If your conference, or OU, has a traditional acceptance rate, follow that guidance.

- In general, 50% is a reasonable target

  - Avoid the temptation to increase the acceptance rate to increase attendance. Quality is the primary objective.

  - Consider reducing the acceptance rate to **avoid too many parallel sessions**

- Factors that affect the acceptance rate

  - The reputation of the conference, and the quality of the papers submitted

  - The participants that are targeted – e.g., student papers vs. established researchers

  - The intent of the conference – e.g., workshop of work in progress vs. presentation of finished work

  - The intention to publish the proceedings in *Xplore* is also a factor

Author Feedback

- For accepted papers

  - Clear instructions for text and/or figures requiring revision or correction

  - Indication of what additional content is required

  - Suggestions to improve that paper

  - Instructions for the final paper submission – deadline, template

- For rejected papers – 2 schools of thought:

  1. Simply communicate that the paper was "not accepted"

    - This is thought to minimize complaints from rejected authors

  2. Indicate why the paper was not accepted, with general indication of shortcomings

    - This is intended to help authors with future papers submissions

    - This is thought to invite arguments from rejected authors

Similarity Check Scores should not be shared with authors

Final Paper Submissions

We aren't Finished Yet!

Approved Version

- Submitted on an IEEE template, or on a conference custom template (compliant with IEEE standards)

- **eCopyright is required**

- Final papers should be reviewed for compliance

  - Assign a team member be accountable for proofing the final submissions for template language etc.

  - Conduct another round of cross check screening

  - Were reviewer requirements addressed?

  - Was anything significant changes of added?

  - Is any *template instruction text* still in the paper?

- Typically, the author is required to register for the conference before the final version of the paper is accepted

  - Part of a no-show policy (Non-Presented Paper Policy)

Non-Presented Papers

Call for Papers

- Your "Call for Papers" must include the conference's policy on non-presented papers, if you are intending to withhold those papers from *IEEE Xplore*®

- IEEE suggests you add the following statement in the call for papers:

"IEEE reserves the right to exclude a paper from distribution after the conference, including IEEE *Xplore*® Digital Library, if the paper is not presented by the author at the conference."

- Poor quality is also a valid reason for excluding a paper from distribution

Non-Presented Papers – Hybrid Events

Call for Papers
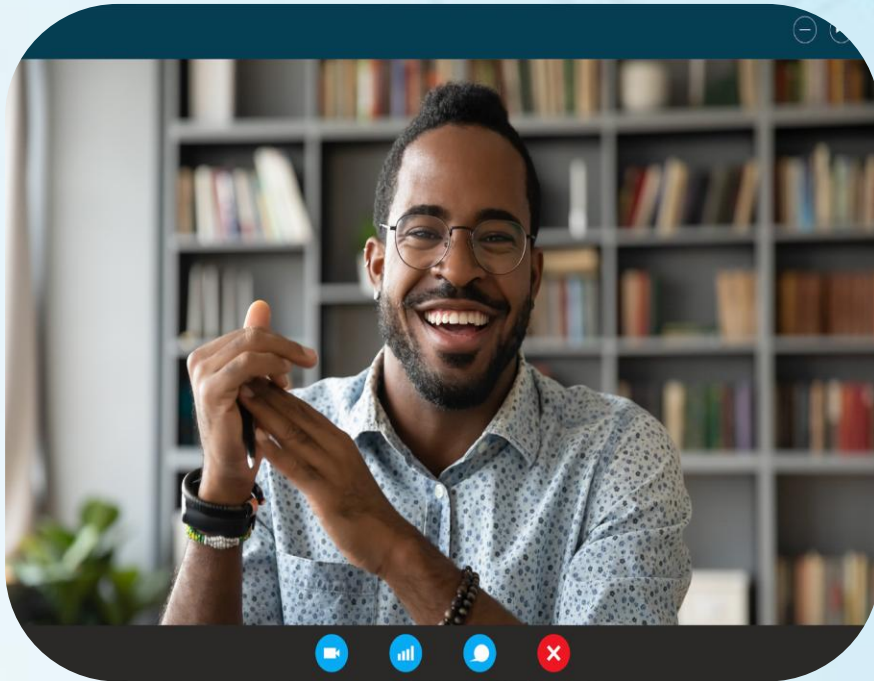
- **If your event is hybrid,** consider whether authors will be allowed to present virtually or if the hybrid format is intended only for attendees.

- **In some cases**, exceptions for virtual author presentations may be granted with approval from the General Chair.

- **To avoid misunderstandings**, it is recommended to include clear wording in your call for papers stating that papers must be presented on-site by a registered presenter in order to be published.

Technical Program Summary

- The Technical Program is the heart of the conference

- The Technical Program Chair is responsible for developing and executing a high-quality technical program

- Each submitted paper should receive a minimum of three (3) reviews

- Reviewers should not be assigned more papers than they can reasonably review

- Plagiarism checking is required
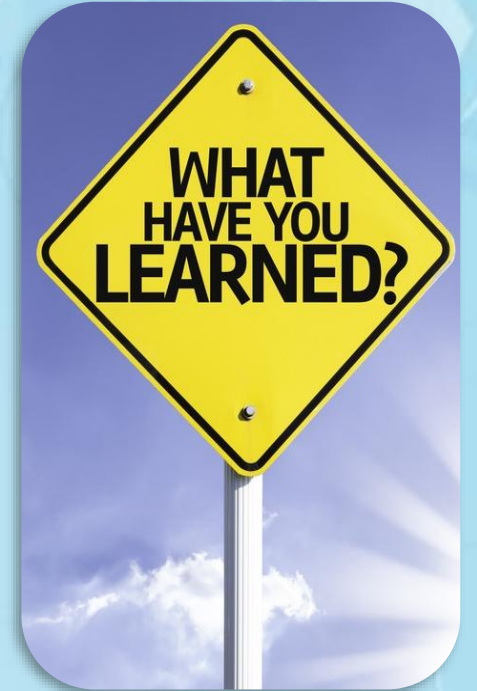
If you need assistance, please contact CEE's Customer Relationship   Management Team IEEE CEE Services / IEEE CEE General Inquiries

cee-services@ieee.org

THE END ?

Goal Setting

You Can't Manage it, if You Can't Measure it...

Goal Setting - Quantitative

Examples

- Number of papers submitted, acceptance rate (#,%)

- Number of attendees, authors, exhibitors, patrons, reviewers, volunteers

- Surplus returned to IEEE ($)

- OU Engagement - # of IEEE members involved in conference/on committee

- New IEEE memberships (#)

- Develop new list of potential attendees

- Industry representation (%)

- Women representation (%)

- Young Professionals (%)

- Press coverage, articles published, social media activity

Goal Setting - Qualitative

Examples

- OU learning and skill attainment

- Overall event quality

- Outstanding Networking Events

- Prominence of Keynote/Invited speakers/Esteemed Reviewer

- Prestigious Sponsors

- Professional development, Learning Labs

Pick a Subset and Focus

- Site tours, social and student activities

- Effective sponsor coordination and working relationships

- Food and beverage, event execution

- Cutting edge topics

- Highest quality conference proceedings

- Social Media Buzz

Publication Chair Role

Peter Nagy,
IEEE MGA Ad hoc on Conferences

IEEE R8 Conference Leadership Workshop
25 August 2025, Tunis, Tunisia

Peter Nagy - intro

- Working for HTE: industry - related, like an IEEE section,

- Family: wife, 2 daughters (18y, 16y), 1 adopted cat ☺

- **Region 8 Operating Committee** – 2021-2022 Vice-Chair Technical Activities, **Conference coordination**, People management / process management / succession planning / new projects

- **45+ International Conferences** (management or finance roles)

- National Society Agreements Program

- IEEE MGA Achievement Award 2023 – national societies, industry relations

- Current duties: **MGA Adhoc Committee on Conferences**, R8 Membership Development Comm., R8 Sections Congress Coordinator, IEEE Employee Benefits and Compensation C., IEEE Communications Society Finance C.

- Past: **IEEE Conferences Committee**, **GLOBECOM & ICC Management and Strategy Cmte ,** MGA IT Coordination and Oversight, R8 Awards and Recognition C., IEEE Communications Soc Strategic Planning C.,

Conference Publication Program (CPP)

IEEE's Conference Publications Program (CPP) facilitates the **acquisition of conference proceedings** and post-conference **distribution of content**.

Conferences are eligible to participate in CPP upon approval of their IEEE sponsorship application and submission of the **IEEE Publication Form**. The process for acquisition of conference proceedings **tracks across the lifecycle** of the conference.

IEEE

Publishing with IEEE

Benefits

- Authors will find that publishing with IEEE ensures **professional development** and **exposure** of their work

- IEEE maintains active partnerships with indexing providers to **maximize the discovery** of author works

- Information on indexing & abstracting partners can be found on IEEE Xplore

https://ieeexplore.ieee.org/Xplorehelp/#/overview-of-ieee-xplore/about-content#publishing-and-indexing-partners

Publication Chair

IEEE

Publication Chair Role

- **Manages** the production of the conference publication, including the final program and technical papers.

- Is also responsible for the final signoff of conference content published at the event, and **post-conference submission** to the IEEE *Xplore*® Digital Library.

- Serves as the **point of contact** for all Xplore submission related inquiries before and after the conference.

IEEE

Publication Chair Role

Key Responsibilities

Preparing Papers and Checking for Plagiarism

Obtain IEEE *Xplore*-compatible PDFs from authors using PDF eXpress and check for plagiarism with Crosscheck

Collecting Copyright

Complete the eCF Site registration for the conference

Obtain transfer of copyright using the Electronic Copyright Form (eCF)

Submitting Proceedings to IEEE *Xplore*®

Learn how to properly prepare your packing list and format your materials for submission to IEEE *Xplore* after your conference

Hiring a Publication Vendor

Explore IEEE's fee-based publication vendors that can help you prepare IEEE *Xplore*-compliant conference content

Publishing Information for IEEE Conference Authors

Find helpful information to authors on copyrights, templates, PDF eXpress, the IEEE Conference Search, IEEE *Xplore*, and Indexers

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How to Publish

Five Basic Steps

1. Complete the IEEE Conference **Publication Form**

2. Receive confirmation of your publication by IEEE and authorize the **Lett** **of Acquisition** (LOA), via an electronic signatory process

3. Register for electronic copyright to **collect copyright transfer** from authors for each accepted paper in the conference proceedings

4. Register & use **PDF eXpress**

5. Prepare and **submit the conference proceedings** to IEEE

Publication Acquisition

IEEE

Conference Publication Form

IEEE Conference Publication Form

The Conference Publication Program (CPP) assures wide distribution of conference proceedings by providing abstracting and indexing of all individual conference papers for inclusion in worldwide databases. In order to submit the IEEE Conference Publication Form, you'll need an IEEE Web Account. To sign in or to create an IEEE Web Account, please click here.

The CPP makes every reasonable attempt to ensure that abstracts and index entries of content accepted into the program are included in databases provided by independent abstracting and indexing (A&I) services. Each A&I partner makes its own editorial decision on what content it will index. IEEE cannot guarantee entries are included in any particular database.

I want to

Submit a Conference Publication Form: Enter conference record number   **Start**

Find the status of a submitted Conference Publication Form: Enter conference record number   **Status**

Register for PDF eXpress: Enter conference record number   **Start**

All conferences and conference proceedings must meet IEEE's quality standards, and IEEE reserves the right not to publish any proceedings that do not meet these standards.

IEEE is ready to help. If you have questions about this form, please contact Conference Operations at events@ieee.org.

https://www.ieee.org/conferences/organizers/conf-app.html?appName=Publication

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Letter of Acquisition (LOA)

- The Publication Chair serves as the point of contact for all Xplore submission-related inquiries before and after the conference.

- LOA is sent out to the organizers for <u>electronic signature confirming intentions of publishing</u> *actionable

- Contains relevant information for **creating and submitting** your conference content to IEEE

- Information on how **to title content** for easy citations from IEEE Xplore

- **Formatting and quantity** of what should be submitted to our team for inclusion into Xplore

- Instructions on **Copyrights**, including Registering for eCF to obtain electronic copyright transfer from your authors and Copyright page text

◆IEEE

Letter of Acquisition (LOA)

- IEEE CEE (Conferences, Events & Experiences) will assign catalog numbers to your conference based on what types of media you indicated you would be producing on the Publication Form.

  - If this media changes or is no longer being produced, please inform CEE to obtain an updated LOA

  - Be sure to include these numbers on all conference publication content by the correct media type for cataloging

CATALOG NUMBERS

Media Type Requested	Part Number	ISBN	Print ISSN	Online ISSN	Media Qty Requested
XPLORE COMPLIANT	CFP24BAD-ART	979-8-3503-4434-9		2831-6983	1
USB	CFP24BAD-USB	979-8-3503-4433-2			1

If the media types being produced change from what you provided on the IEEE Publication form, please contact ieee-mce@ieee.org for new cataloging information.

Register for PDF eXpress®

- Publication Chair serves as the point of contact for all Xplore submission related inquiries before and after the conference.

- PDF eXpress is an IEEE tools that assists conference authors with **formatting** their paper into an in "IEEE *Xplore* compliant" file (PDF)

- **Converts** a non-PDF source document, typically, a Microsoft Word document or LaTeX bundle into a PDF that meets IEEE *Xplore* requirements
  - It will confirm that an author-generated PDF meets IEEE Xplore requirements
  - **When a paper is IEEE Xplore compliant your author's content is uploaded with minimal delay**

- Includes a feature to enable paper collection: authors deposit their final, IEEE Xplore® compliant PDFs onto the site for collection by the conference's publication chair *(this is not submission to Xplore)*
  - Eliminates the need for publication chair to track down individual authors for their papers
  - Helps ensure that the publication or program chair has the most recent version of the author's paper
  - Meets a business need for small to medium-sized conferences whose publishing requirements are very simple

https://ieee-pdf-express.org

Register - PDF eXpress® (continued)

Free Service - Do it Yourself - Improve Author Experience

- **Register** within the Publications form

- You will receive a **welcome package** via e-mail, including a project-specific URL, and Conference ID to send along to the authors whose papers have been accepted for presentation at your conference

- Place a hyper link to your PDF eXpress site onto your conference's author instruction page

◆ IEEE Conference Publication Form

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I want to

Submit/Complete a Conference Publication Form: Enter conference title or record number   [Start]

Find the status of a submitted Conference Publication Form: Enter conference title or record number   [Status]

Register for PDF eXpress: Enter conference title or record number   [Start]

Transferring Copyright

- Serves as the point of contact for all Xplore submission related inquiries before and after the conference.

- IEEE policy requires that prior to publication all authors or their employers **must transfer** to the IEEE any copyright they hold for their individual papers.

- Transferring copyright is a necessary requirement for publication, except for material in the public domain or which is reprinted with permission from a previously published, copyrighted publication.

- Each author is required to transfer copyright of their accepted paper to be published in IEEE Xplore

  - The **eCF** is used to complete the **transfer of copyright** from each author

  - The **eCF report tool** is used by Publication Chair to **track progress**, generates report showing all of the eCFs and their status

◆IEEE

IEEE Electronic Copyright (eCF)

The Copyright Transfer Process is Now Automated
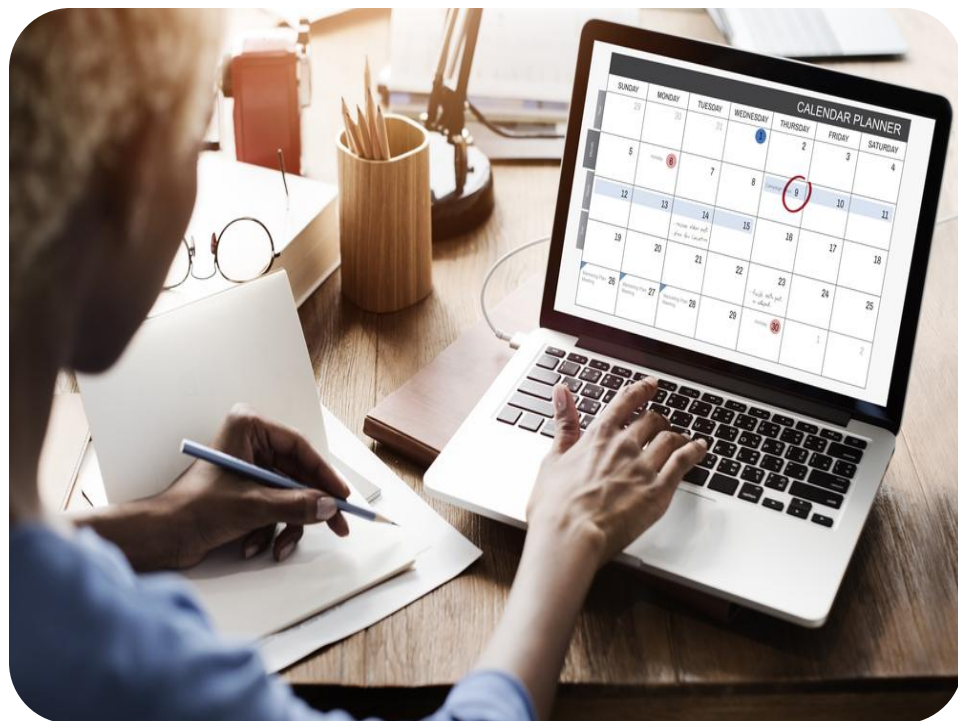
ONCE CEE PROCESSES THE SUBMITTED PUBLICATION FORM THE LOA IS SENT THE PUBLICATION CHAIR

THE ECF REGISTRATION REQUEST EMAIL IS SENT TO THE PUBLICATION CHAIR SOON AFTER

UPON REGISTRATION THE PUBLICATION CHAIR WILL RECEIVE DETAILED INFORMATION FROM IEEE COPYRIGHTS DEPARTMENT FOR THE SET UP OF THE SITE (EITHER VIA SUBMISSION LINK OR UPLOAD TOOL)

IEEE Electronic Copyright Registration (eCF)

The conference is over… now what?

Create & Submit the Final Conference Content

Packing List Generator (PLG)

Required

- This list is used to identify all the PDFs in the submission, their content type, presentation status and copyright transfer status

  - PLG ensures that all files will be accounted for during processing

  - Include all accepted papers and front matter (table of contents, cover page etc.)

  - If any files or front matter do not appear on the packing list, they will not be uploaded to IEEE Xplore

- To avoid delays, please be sure to download the most recent version of the Packing List Generator.

- Always use the IEEE Packing List Checker to validate the packing list prior to submission.

  - The Packing List Checker tool should be used anytime a change is made to the packing list.

https://www.ieee.org/publications/services/services-resources

Formatting Your *Xplore*-Compliant Submission

Xplore Compliant Folder Structure – prevents delays

The Xplore-compliant .zip file would contain 1 folder, including the following:

- Individual Xplore-compliant PDFs of each paper

- PDFs of any front or back matter (ex. copyright page, title page, table of contents, and author index) identified on the Packing List

- Multimedia or supplemental files, if any (contained in a single ZIP file for each PDF file)

- Packing List with a ".txt" extension

- Zip File Naming Convention: **Conference Record Number_Part Number.zip** (reference LOA)

```
3       1.7
Josh Raba
j.raba@ieee.org
7325556543
49361_Test Conference_packing list
piscatawy
2024-06-12 2024-06-21

Final
49361

978-1-7281-1043-1 Electronic

001_paper1.pdf  Y       1       orig-research           N       X       001     Y
002_paper2.pdf  Y       2       orig-research           N       X       002     Y
003_paper3.pdf  Y       3       orig-research           N       X       003     Y
004_paper4.pdf  Y       4       orig-research           N       X       004     Y
005_paper5.pdf  Y       5       orig-research           N       X       005     N
006_paper6.pdf  Y       6       orig-research           N       X       006     N
```

Name
1234_CFP20XYZ-ART.zip

WinZip [1234_CFP20XYZ-ART.zip]
- Xplore_Compliant_Folder
  - 000a_Welcome.pdf
  - 000b_toc.pdf
  - 001.pdf
  - 002.pdf
  - 003.pdf
  - 004.pdf
  - 005.pdf
  - 006.pdf
  - 007.pdf
  - Xplore_Packing_List.txt
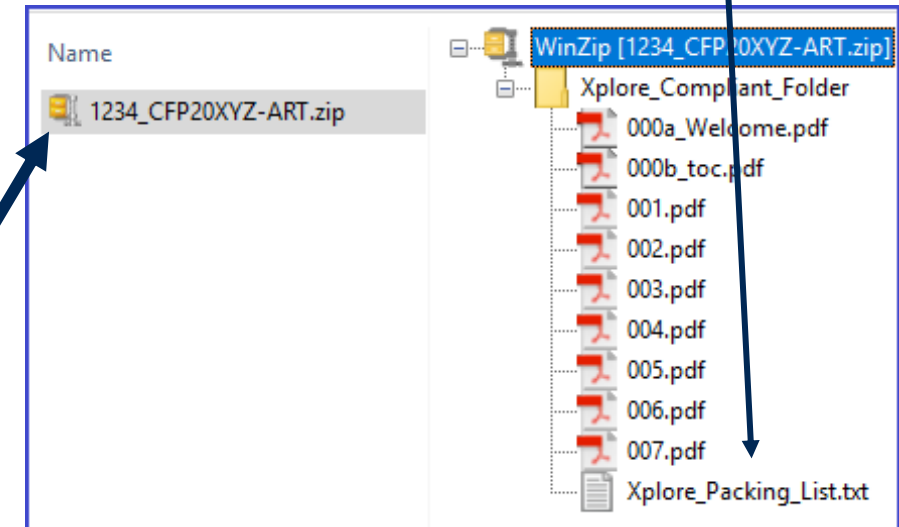
IEEE

Final Checks Before Submission

- Review the **accepted papers one final time** to ensure that they meet the IEEE specifications for upload to *Xplore*
  - Ensure that the conference has accounted for non-presented papers (**no show**) and indicated on the packing list if applicable
  - Include, if applicable: cover art, General Chair's message, Program Chair's message, listing of Conference Committee Chairs and Members, conference sponsors, listing of sessions, photos, and other conference-specific information

- Check to make sure you have a completed **eCF from each of the authors**
  - Any papers with pending copyright transfers will not be submitted for inclusion in IEEE *Xplore* and will not be sent to our Indexing Abstracting & partners

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Other Relevant Topics in the Conference Arena

IEEE Conference Quality Governance

Conference Quality Committee (CQC)

Ensures overall quality of IEEE Conferences. Serves as primary point of contact, reviews and audits conferences, recommends quality policies, procedures, and practices and adjudicates appeal requests from the TPIC

Technical Program Integrity Committee (TPIC)

- Oversees quality of conference materials submitted to IEEE *Xplore®*.
- Provides pre-submission consultation, evaluation of conference materials (scope and quality), guidelines on removing material for resubmission, and corrective actions.

Conference Application Review Committee (CARC)

- Recommends ways to increase IEEE Conference quality.
- Identifies sets of applications with likely quality issues, evaluates intervention options, intervenes in conference applications, develops procedures, recommends policy changes, and rejects conferences as necessary.

Conference Organization Integrity (COI)

- Investigates and takes actions on incidents* in IEEE conferences where individuals or entities involved in organizing conferences might have violated IEEE Bylaws, IEEE Policies, IEEE Code of Conduct, IEEE Code of Ethics or other governing policies, including publication, financial and audit provisions.

AI's Role in Conference Proceedings: Balancing Innovation & Integrity

1. **Automated Content Generation:** AI tools can assist in drafting and formatting conference papers, making the process faster and more efficient. This includes generating summaries, creating visual aids, and even writing sections of the papers

2. **Enhanced Peer Review:** AI is increasingly used to assist with peer reviews. For instance, AI can help identify relevant literature, check for plagiarism, and ensure adherence to formatting guidelines. However, there are concerns about the depth and quality of AI-generated reviews, as they can sometimes be superficial and lack detailed critique

3. **Quality Assurance:** AI can automate the initial quality checks of submissions, such as verifying compliance with submission guidelines and detecting potential ethical issues. This helps streamline the review process and ensures that only high-quality papers proceed to the next stages.

4. **Efficiency and Speed:** The use of AI in managing conference proceedings can significantly reduce the time required for administrative tasks, allowing human reviewers to focus on more complex and nuanced aspects of the review process

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Problematic Papers – IEEE Joint Ad Hoc Committee

- A growing number of low-quality / AI-generated papers at conferences

- **"Tortured phrases"** detection (e.g., *Profound Learning → Deep Learning*)

- Common issues: poor references, low-quality figures, repetitions, inaccurate claims

- New quality-control process:

  - External provider scans papers for suspicious wording

  - CrossCheck plagiarism check complemented with new filters

  - High-risk conferences flagged for extra review

- Reviewer guidance: wording issues are **red flags**, not just language mistakes

- Goal: filter out problematic papers **before entry into IEEE Xplore**

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Key Takeaways

Publication Chair = Gatekeeper of Quality
Ensure that only complete, compliant, and high-quality content goes into IEEE Xplore.

Follow the IEEE Processes
LOA, eCF, PDF eXpress, Packing List – each step is essential for successful publication.

Support Authors and Deadlines
Clear communication and timely reminders improve the author experience and reduce risks.

Uphold Integrity
Watch for red flags (e.g., tortured phrases, plagiarism) and help IEEE maintain high standards

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The Research and Technology for Society and Industry (RTSI) model

How to engage industries

Giambattista Gruosso – IEEE Italy Section Chair & RTSI2024 General Chair

IEEE
Advancing Technology for Humanity

Research and Technology for Society and Industry

In a nutshell

- **RTSI** (Research and Technology for Society and Industry) born in 2015 as IEEE **Italy Section flagship conference** with the following objectives:

  - to promote and to strengthen **partnerships and cooperation** between **academia and industry**;

  - to promote discussion between the **research community and government bodies;**

  - to **disseminate** recent advancements, discoveries and novel applications;

  - to discuss ideas and to **promote cooperation between researchers** working in **different research areas**.

IEEE

RTSI

History

- Six editions held in Italy five in presence (2015-2016-2017-2018-2019) one virtual 2021

- In **2021** R8 approved to make this conference a **R8 portfolio conference** because is **the first R8 Industry focused conference**

- Every three years back to Italy.

RTSI

- 1st : Torino, Italy, 16-18 September 2015,

- 2nd : Bologna, Italy, 7-9 September 2016, https://apice.unibo.it/xwiki/bin/view/RTSI2016/

- 3rd : Modena, Italy, 11-13 September 2017, https://rtsi2017.ieeesezioneitalia.it

- 4th : Palermo, Italy, 10-13 September 2018, https://rtsi2018.ieeesezioneitalia.it

- 5th : Firenze, Italy, 9-12 September 2019, https://rtsi2019.ieeesezioneitalia.it

- 6th : Naples, Italy, 6-8 September 2021, https://rtsi2020.ieeesezioneitalia.it

- 7th : Paris, France, 24-26 August 2022, https://ieeefrance.org/rtsi2022

- 8th : Lecco, Italy, 18-24 September 2024, https://2024.ieee-rtsi.org/

- 9th : Gammarth, Tunisia, 24-26 August 2025, https://2025.ieee-rtsi.org/

RTSI

➢ RTSI is a **FORUM** not only a technical conference (with papers published on IEEExplore) but a place for **networking** and **exchange of experiences among different stakeholders** where all involved participants (**Research** (academia, research centers, researchers) and **Technology** (engineers and practitioners) for **Society** (government bodies, municipalities, large audience) and **Industry** (big, SME, micro, startups) can find something interesting for them and interact each other.

➢ **The main theme** of the forum is on **Interdisciplinary hot topics** (e.g. Industry 4.0; Smart Healthcare; Smart Energy; Smart mobility; Smart cities; Climate change; Artificial Intelligence) based on the **interest of the local community and local industries**

RTSI

- RTSI is *Financially Co-Sponsored* by the **Region** (>=30%) and the **local Section** (>=50%) which is responsible of the local organization, 20% of the FCS can be taken from other IEEE R8 OUs (e.g. chapters, Sections,...)

- The *Technical Co-Sponsors* are the IEEE Societies/Council involved in the technical program, the local chapters, other Sections or Councils (like AFRICA Council), other IEEE OUs (e.g. IEEE FDC, IEEE IEC, ...), non-profit Organization (Universities,...)

RTSI

- RTSI looks for the financial support of Corporates and SME
- Several model of financial sponsorship are used:

- Participation in the **Exhibition**

- **Keynotes**/plenary speakers

- **Panel** organization and/or contribution with speakers

- **Number of employees** participating as attendees to the program (tutorial, workshops, …)

- Financial sponsoring of **Awards** for S&YP/WIE/Startups

- Submission and presentation of **technical papers**

RTSI

- R8 main committees in cooperation with local Section and its WIE AG, YP AG and SBs, organize:

    ✓ **Poster, Demo or video pitch Competitions** (e.g. best research project , best entrepreneurship idea)

    ✓ **Hackathons** (on a problem that is strategic for industries supporting the forum)

    ✓ **Workshops on soft skills** (e.g. time management, teamwork, leadership, project management, …)

    ✓ **Job fair**

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RTSI

➤ **Entrepreneurship Workshop** (with university incubators, accelerators, venture capitals, International, European or National bodies, Examples of successful startups) *for young entrepreneurs* (with the support of IEEE Entrepreneurship)

➤ **WIE Panel/Workshop** with *female industry leaders* as speakers

➤ **Round tables/Panels** on long term strategies with *industry executives/government bodies representatives*

➤ **Workshops** to present the results of *European Projects*

➤ **Workshops on hot topics suggested** by IEEE Industry Ambassadors and/or **Industry** financial supporters

RTSI

➢ **Tutorial** program on the main topics for professional engineers in cooperation with the National *Professional Associations of Engineers* (with **credits**)

➢ **Speeches** organized in cooperation with IEEE R8 Committees or other IEEE OUs on **IEEE Standards, IEEE Milestones Program, IEEE Fellow Program**

➢ **Awards Ceremony**

➢ **Welcome reception/Social Dinner**

RTSI

- **1. Event parameter and trends**
  - Attendance
  - Exhibits/Patrons
  - Revenue
- **2. Attendees Demographic**
  - Industry/government affiliation
  - Job function e.g. designer/developer, researcher
  - **3. Industry program elements**
    - Match industry program elements to attendee needs
    - Measure number of program elements in each event series
    - Consider effectiveness of each type of program element in audience match

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RTSI 2024

Some Suggestions and Best Practices

Track 1 – Methods and Technologies for AI	Track 2: AI Applications to Energy and Transportation Systems
Track 3: AI Applications to Health and Smart Living	Track 4: AI Applications for Industry

RTSI 2024

6 WORKSHOPS

SEPTEMBER 18th — WORKSHOP ON ADVANCING TECHNOLOGY FOR HUMANITY — INDUSTRY WORKSHOP – AI IN MANUFACTURING

SEPTEMBER 19th — WORKSHOP ON INNOVATIVE STARTUPS AND ENTREPRENEURSHIP

WORKSHOP ON HUMANOID ROBOTICS GO UBIQUITOUS!

IA: MACCHINE, SERVIZI E COMUNICAZIONE REPUTAZIONALE

SEPTEMBER 20th — WORKSHOP – THE ROLE OF AI IN CLINICAL ENGINEERING

RTSI 2024

SEPTEMBER 19th
Best paper
Awards

ABB

SEPTEMBER 18th

IEEE European Public Policy Committee (EPPC)
PANEL on
Understanding the AI Act:
Implementation, Impacts and Implications for
various technology domains

SEPTEMBER 20th

IEEE Italy Section Women in Engineering
Affinity Group
PANEL on
The Advantages Derived from Female
Presence in Working Realities

SEPTEMBER 19th

ROUND TABLE on
AI enabler for the manufacturing: challenges,
success stories and future trends

SEPTEMBER 20th

IEEE YOUNG PROFESSIONALS
PITCH COMPETITION

sps
smart production solutions
ITALIA

IEEE

RTSI 2024

- Involvement of a General Co-chair from Enterprise
  - In RTSI 2024 Diego Ragazzi from Cefriel: an italian consultant company
  - Role: contact other enterprise, propose speakers from industry, help to finalize the program from the point of view of Industry Events
- Involvement of a Publication chair from the communication sector
  - In RTSI 2024 Greta Moretto from Messe Frankfurt Italy: an international fair organizer
  - Role: disseminate the event in a spread network of enterprise
- Involvement of IEEE Societies (VTS; IAS,IES)
- Involvement of other IEEE OUs (Future Directions, Entrepreneurship, EPPC)

RTSI 2024

The Role of Messe Frankurt: a special focus

- Messe Frankfurt Italy is the organizer of SPS Italy, a major fair focused on automation and the digital industry. SPS features an Industrial Scientific Committee composed of over 100 Italian enterprises.

- Together with these enterprises, the Italy Section of RTSI 2024 organized two panels on the application of AI in industry—one in Italian and one in English. The use of the local language was essential to attract attendees from enterprises.

- As a follow-up, in May, the Italy Section presented one of the best workshops at the fair, focusing on Humanoid Robotics. Several member enterprises of the Scientific Committee of SPS have expressed interest in learning more about IEEE and becoming involved in its initiatives.
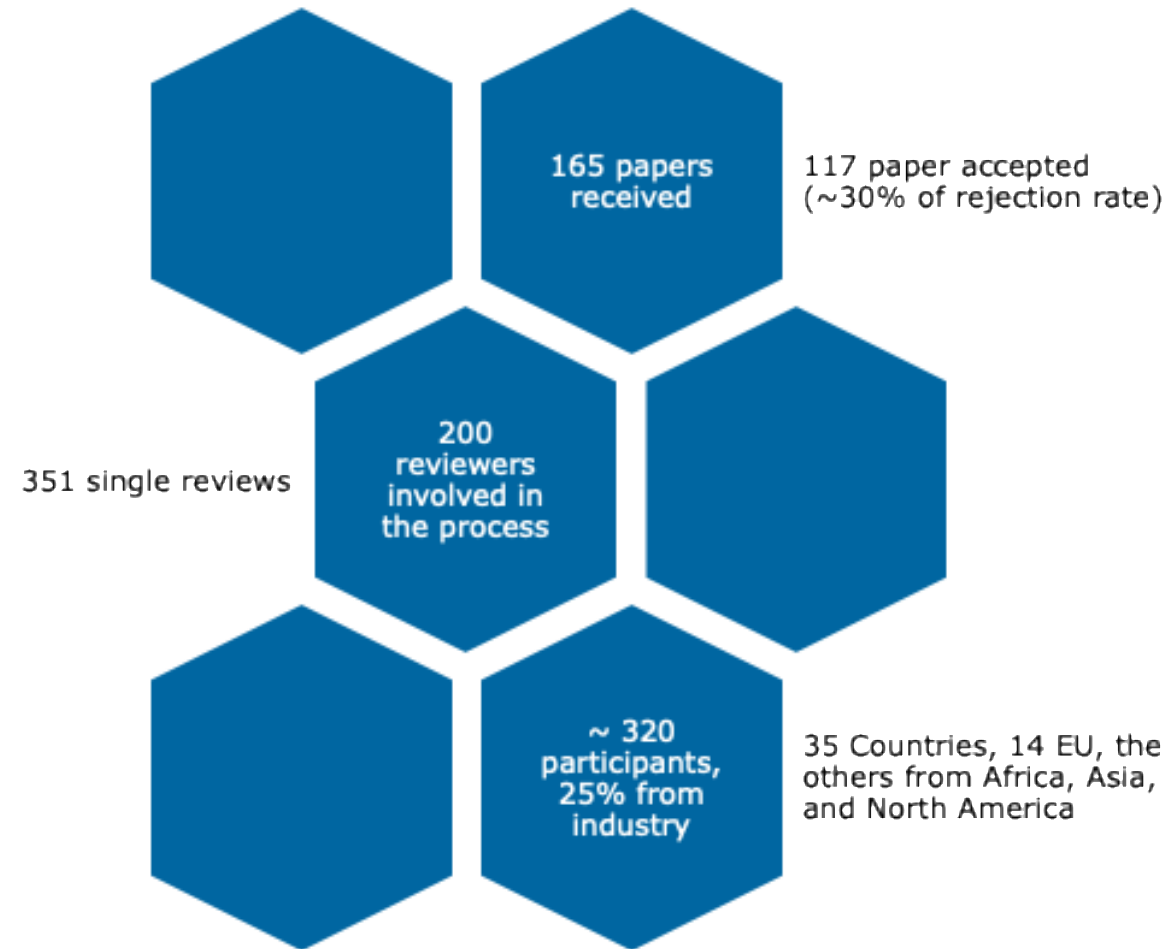
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RTSI 2024

165 papers received

117 paper accepted (~30% of rejection rate)

351 single reviews

200 reviewers involved in the process

~ 320 participants, 25% from industry

35 Countries, 14 EU, the others from Africa, Asia, and North America

IEEE IHTC 2024 – Results & Lessons Learned

Massimo La Scala – IHTC 2024 General Chair

IEEE R8 Conference Leadership Workshop (in IEEE RTSI 2025)
Remote presentation - 25 August 2025

IEEE IHTC 2024 Main Results

▸ 213 submitted papers, 147 accepted

▸ 211 reviewers involved

▸ Contributed with **143 papers** to IEEE *Xplore*®:

  ▸ 67% presented in person on site

  ▸ 33% presented remotely on-line

Europe, Middle East, Africa (IEEE R8) 74,4%
Asia Pacific 11,6%
Latin America 9,9%
Canada & USA 4,1%

IEEE Xplore® Digital Library
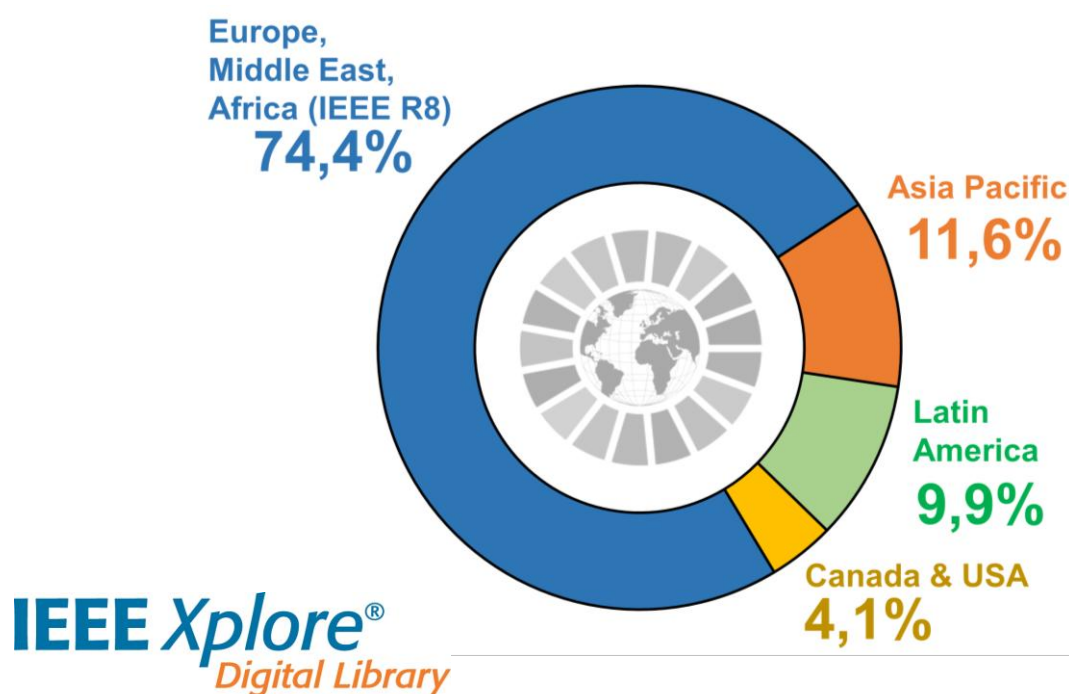
a) Trend in the number of IEEE IHTC Proceedings

Conference Proceedings vs Year (2014–2024)
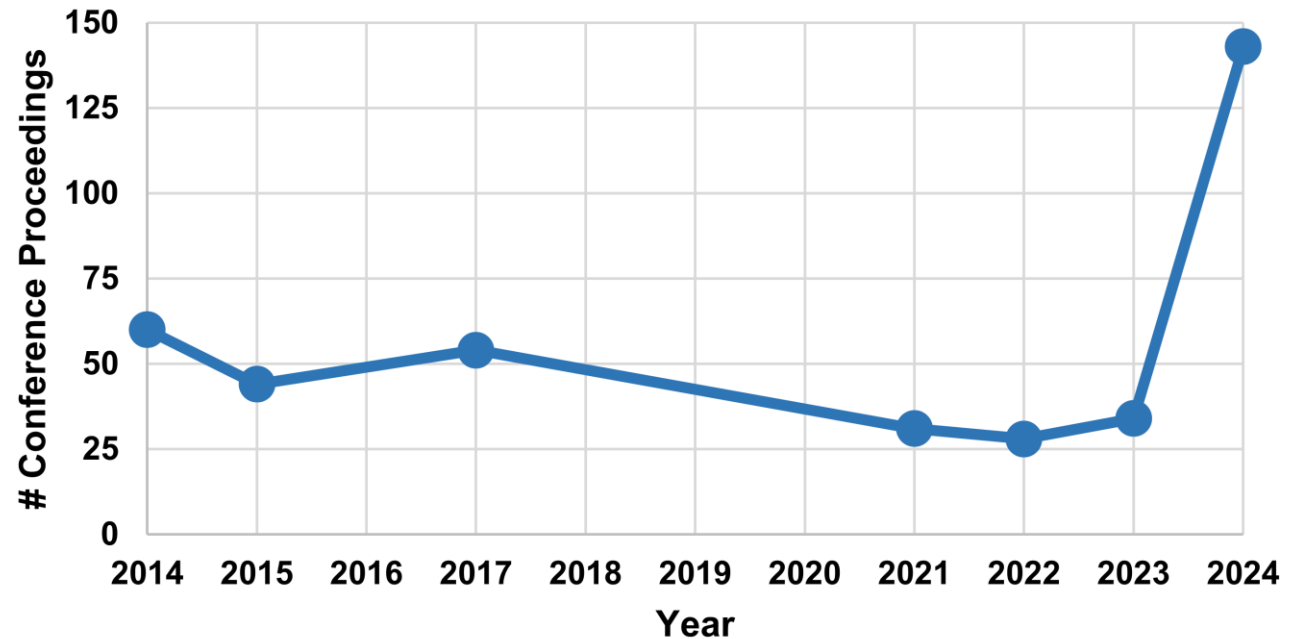
IEEE IHTC 2024 Main Results

IEEE IHTC 2024 saw an unprecedented level of participation:

‣ over 70 countries represented and a total of **436 attendees**

‣ **79% on-site** attendance and **21% on-line**

‣ **17% students**

‣ **23% women**

IEEE IHTC 2024 Countries of attendees
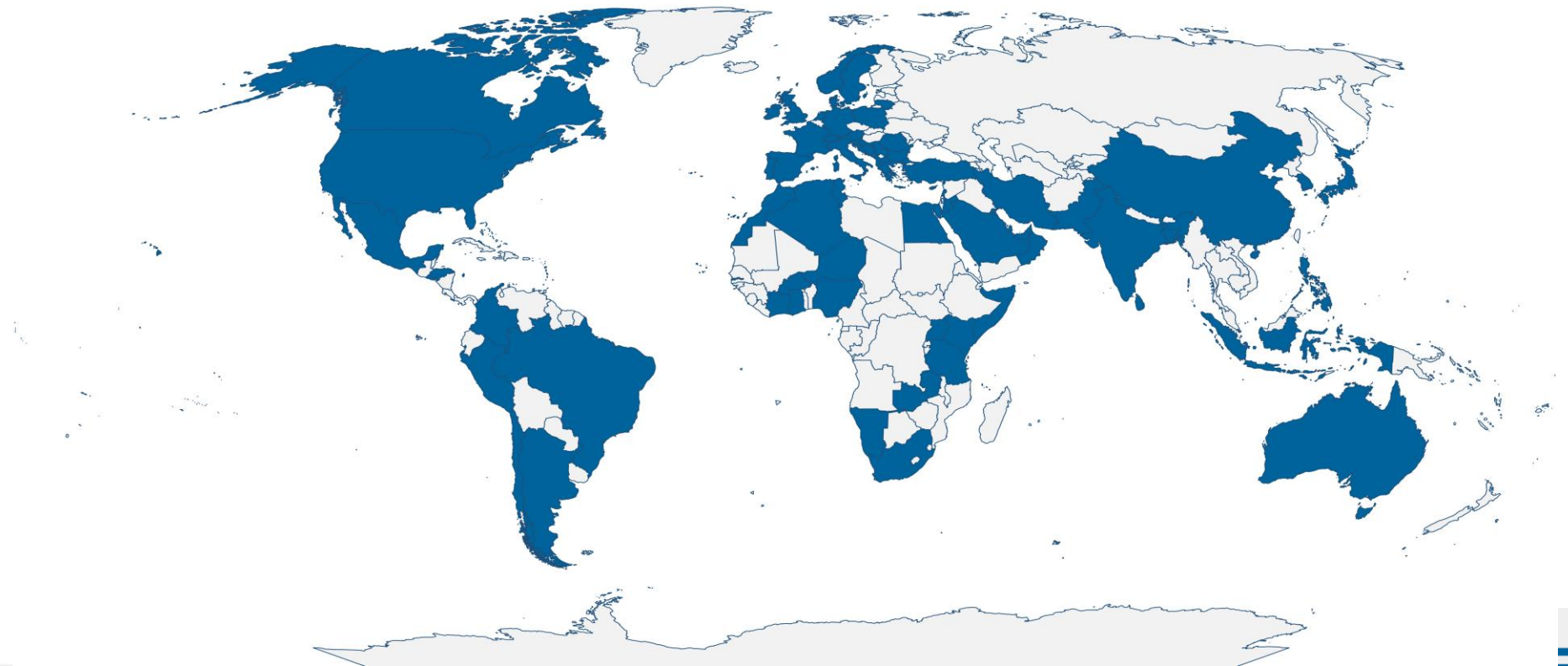
IEEE IHTC 2024 Main Results

▸ 33% of participants were authors

▸ 59% participants from Academia

▸ 45% of participants IEEE Members

▸ **55% non-IEEE members:**

  - **23,5% from industry, governmental and intergovernmental organizations**
    (UN, UNESCO, Energy Agencies, European Commission, etc.)
  - **17,5 % Professional engineers**
  - 13 % others

▸ **Participants origin**:

  - **82% from Europe**
  - **6% from Africa**
  - 2% from Middle East
  - 10% came from outside R8

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Financial Co-Sponsors & Financial Supporters

IEEE FINANCIAL CO-SPONSORS

CORPORATE SPONSORS

GOLD SPONSORS

SILVER SPONSORS

External Support & Financial results

External support is very important to reduce the financial risks for IEEE Financial co-sponsors (R8, R7, R9, Italy Section)

- ▸ **Final Balance: + 25% over the Total expenditure**

- ▸ **Industry support: covered 26 % of total expenditure**

  - **Corporate: 58%**

  - **Small Medium Enterprises: 42%**

- ▸ **IEEE HTB support: 8% of total expenditure**

- ▸ **Politecnico di Bari support:** Location, personnel, equipment, small expenses

Conference Program

- ‣ **16 Special Sessions**
- ‣ **3 Keynote Speeches**
- ‣ **13 Panel Sessions and Round Tables**
- ‣ **Industry-oriented Workshops**
- ‣ **Exhibitions**
- ‣ **Workshops**
- ‣ **IEEE Booths**
- ‣ **Challenges & Competitions**

IEEE IHTC 2024
a highly multidisciplinary conference with a central message

▸ IEEE IHTC **fully embodies the ideals** of the IEEE motto **"Advancing Technology for Humanity»**

▸ The conference has a **high potential** because of its **multidisciplinarity** and the **central message** it promotes.

▸ These characteristics make the **organization challenging** since the conference may appear:
   - **Too generalist** and not **sufficiently scientific**
   - At times **rhetorical**, and **lacking in substance** which may generate distrust toward the ideals it promotes

▸ It presents some difficulties to be organized (i.e., **it needs the contribution of many different technical areas** (expertise, reviewers, technical support, resources, volunteers, etc.).

IEEE IHTC 2024
How to face the challenge

Focus on a **limited number of topics based on concrete issues** such as some UN SDGs

Good Health and Well-being (SDG 3),

▸ Clean Water and Sanitation (SDG 6),

▸ **Affordable and Clean Energy (SDG 7),**

▸ Sustainable Cities and Communities (SDG 11)

▸ Responsible Consumption and Production (SDG 12)

▸ ICT for Development (ICT4D).

3 Tracks & 16 Special Sessions:

▸ Clean & Affordable Energy

▸ Critical Events & Adverse Living Conditions

▸ Life Quality Improvement

IEEE IHTC 2024
How to face the challenge

Utilize the full potential of IEEE and technical co-sp...

- 5 IEEE Societies (PES, OES, IAS, GRSS, Education),
- 10 IEEE Italy Chapters (IA/PEL, ComSoC, Education, EMB, GRS, IAS, MAG, OES, PES, RA)
- 2 Affinity Groups (WiE, YP)

More chapters wanted to join us... but updating MoU still takes a long time!

Patrons

▸ **Italian Ministry of the Environment and Energy Security**

▸ **RSE** (a research center about Energy, consultant for the Industry Ministry)

▸ **IEEE Smart Village**

▸ **RES4Africa** (a foundation about the RES projects in Africa), **CIHEAM** (an international well-known institution operating in Bari and Africa)

▸ **CIGRE** (Italian section) **, AEIT** (sister society of IEEE)

▸ Scientific Academic associations active in Italy (**GUSEE, ENSIEL**)

▸ Professional Registered Engineers association (**OIBA**), **Local Authorities**

IEEE IHTC 2024 -How to face the challenge

Three audience targets:

▸ Scientific & Academic

▸ Decision makers, industry, governmental & intergovernmental bodies

▸ Professional engineers

Tried to align with the interest of these **3 audience g**

▸ Scientific sessions as well as

▸ High level panel sessions and round tables

The presence of high ranked decision makers and institutions strengthened industry support and professionals' participation.

IEEE IHTC 2024 – Industry Involvement

This conference **has a tremendous potential because of the social message** and **offers significant opportunities for growth through collaboration and support with industry**.

It was observed a strong commitment of companies toward **sustainability, climate change issues and energy transition**.

Industry involved:

▸ Companies whose **corporate mission** includes humanitarian/social objectives

▸ But also, **surprisingly**, **Small and Medium-sized Enterprises** that aim to promote **a more 'glocal' image**:

- Promote **global** values (like sustainability or innovation),
- While adapting their products, messaging, or operations **to fit local markets**

SMEs represent a reservoir of support opportunities that remains largely unexplored

IEEE IHTC 2024 – Industry Involvement

To foster stronger ties with the industry for future activities with IEEE, in IEEE IHTC 2024 we:

▸ created opportunities to **communicate innovative projects, social/humanitarian strategies**, collaboration opportunities **through panel sessions and round tables.**

▸ get involved in **speeches and panels with institutional decision makers** and **regulators** of energy policies in Italy, EU and the Mediterranean basin. **Speakers and almost all panelists were self-supported** witnessing the genuine interest for the event.

▸ Get involved speakers from **high ranked institutions** such as **UN, UNESCO, regulators** etc.

▸ **engaged the press, media partners, associations, and foundations** before, during, and after the conference through targeted follow-up activities.

▸ hosted **an exhibition** with B2B contacts.

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IEEE IHTC 2024 – Promote the conference

Advertise the Conference and send updated info through different channels:

- **IEEE channels** (e-notices in R8, R7, R9, HTB, Italy section, Chapters, Societies)

- **Patrons and supporters**

- **Conference website** managed by the organizers and an agency to guarantee quick update of the contents.

- **Social links** such as LinkedIn, Facebook, Instagram and X managed by PhD students

- **All IEEE and AEIT conferences the organizing committee participated to, were used to promote** with **flyers and presentations IEEE IHTC 2024** (see for example MELECON 2024 in Porto, EEEIC 2024 in Rome, AEIT annual conference in Trento, etc.).

- IEEE IHTC 2024 also used **a press agency and three media partners** to promote the conference on a national basis (Italy), to stimulate the **interest of media and provide a fair visibility to the companies which financially supported** the event and **to main speakers**.

IEEE IHTC 2024 – Promote IEEE Activities

▸ Some of topics of the conference, such as AI for weather forecasting, energy transition, water scarsity, poverty and energy justice, have **resonated in the national press** (Huffington post, on-line newspapers, digital news outlets, etc.)

▸ **Reports** related to the visibility gained by the companies and SMEs that financially supported the initiative have been produced **to justify their effort and build loyalty with IEEE activities.**

▸ Submitted some **resumes of the conference to R8 Newsletter and AEIT Journal**

▸ A strong collaboration with **AEIT** produced a **promotional article** and a **focus with 4 papers** reviewing the results of IHTC 2024 and main findings of the 3 most successful panel sessions. This association is **an IEEE sister society (NSA signed) and has a strong impact on companies and research centers in Italy** and **may strengthen the relationship between IEEE and the Italian industry.**

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IEEE IHTC 2024 – Promote IEEE Activities

- The **IEEE Humanitarian Technologies Board (IEEE HTB)** has been a **technical financial sponsor** as well as a **source of inspiration for IEEE volunteers** around the world engaged in the conference

- **The R8 Humanitarian Activity Committee** with participation of members of the **IEEE HTB organized the R8 Humanitarian Activities Congress in conjunction with IEEE IHTC 2024.**

- **Many sessions were devoted to the IEEE HTB activities**.

- **IEEE Smart Village, IEEE EPICS and IEEE SIGHT** further enhanced the event's impact by presenting community-driven sustainable solutions for humanitarian purposes.

- **Two Keynote speeches** and many **presentations from IEEE and R8** representatives were hosted in panels and workshops.

$\Leftrightarrow$ **IEEE**

IEEE IHTC 2024 – Promote IEEE Activities

Two booths were provided during the conference to promote IEEE, HTB and Smart Village Program

IEEE IHTC 2024 – Low Development Areas Involved

▸ **Hybrid event**

▸ Support from **IEEE HTB** for providing help to young researchers

▸ We tried to keep the **registration fee as low as possible**

▸ **10 travel grants** for the participation in presence and **10 registration waivers** for remote participation for young contributors from countries classified as "Low Human Development" in UNDP Human Development Report 2023/2024.

▸ We used **IEEE channels and Foundations operating in Africa** (RES4Africa, CiGRE Academy, Don Bosco, Iliceto Foundation, CIHEAM etc.) to reach the whole potential audience

▸ **Not all travel grants and waivers were utilized**

▸ **Some papers did not meet minimum requirements for a scientific paper.** We should intensify our activity in providing **info and technical skill** directed to these countries.

IEEE IHTC 2024 – Competitions

**IEEE IHTC 2024 hosted two IEEE R8 Competitions on Climate Change:**

▸ The finals of an IEEE R8 hackathon-style competition on **"AI in Enhanced Weather Forecasting"**

▸ the challenge on **"Disaster-Resilient Communication"**

Other challenges:

Best student paper prize

Best PhD student innovative idea on 5 UN SDGs

Best HT Entrepreneurship Idea on the thematic areas of IEEE IHTC 2024
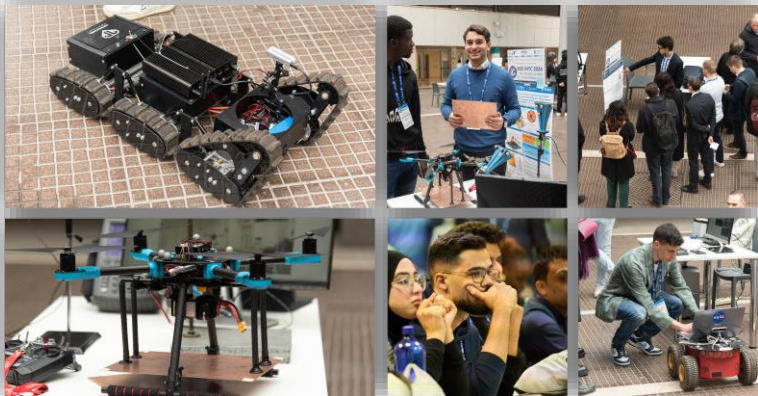
IEEE IHTC 2024 – Women Participation
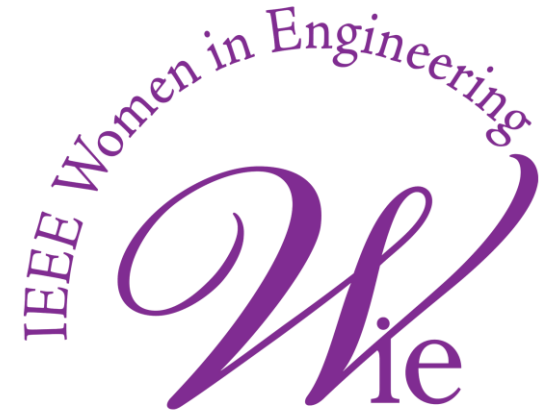
- **23% of participants were women**

- **23% of female organizing committee members**

- **29% of invited female speakers / keynotes**

- **A panel "WIE in Humanitarian Technologies",** organized by Women In Engineering Italy together with R8, was particularly successful.

- **A special award denoted TUNE** – Technology Supporting and Empowering Women Award honored women-led research in engineering and **granted one paper** among more than 20 candidates to showcase research with the objective of sharing skills and initiatives by women in working realities and of supporting the communication for women access in engineering disciplines.

IEEE IHTC 2024 – Some Findings

Key recommendations from IEEE IHTC 2024 include **strengthening partnerships between academia, industry, and policy-makers,** expanding **capacity-building initiatives,** and **promoting open data to enhance decision-making processes.**

Beyond the conference technical sessions, IEEE IHTC 2024 also fostered **informal networking and collaboration among participants**, reinforcing the spirit of shared innovation.

We tried to make **IEEE IHTC 2024 a true call to action**, bringing together innovators from around the world, united by the shared goal of building a better future, in the true spirit of the IEEE motto.

And something is actually going on … as long as we know

IEEE

IEEE IHTC 2024 – Follow up

Some actions that actually arose from the conference discussions we are aware of:

- **a collaboration with some African universities** (ex. Agreement between Dar er Salaam University and Politecnico di Bari for student exchange)

- **Joint research project proposal** between an IEEE IHTC 2024 sponsor and some African Universities.

- **Preliminary work for the creation of a School of Energy Regulation in the Mediterranean Basin**

- Creation of a **Master about the Innovation in Energy Systems** to challenge the decarbonization

- A **sponsor in the water supply sector is willing to support a small desalinization plant** to relief lack of water **in critical areas through UN**. Some meetings going on to choose and deliver the equipment.

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IEEE IHTC 2024 – Social Activities

▶ Incorporating social activities into a conference program helps **strengthen connections among attendees** and encourages them to return for future editions.

▶ All conference arrangements, social events and exhibition setups were **plastic free** as required by **our industry sponsors and the patronage of the Ministry of the environment and energy security**.

▶ As usual, special attention has been given to **dietary practices**.

▶ A **welcome reception** was organized in a restaurant close to the *Petruzzelli Theater* one of the largest theater in Italy.

▶ Our participants **got tickets to follow a concert** by a famous orchestra playing classical pieces **at Petruzzelli Theater** after the welcome party.

▶ A **gala dinner** hosted an award ceremony and the presentation of IEEE IHTC 2025. A completely **acoustic and brass musical group** accompanied the evening with classical music pieces and soundtracks from international films.

▶ Feedbacks about the social activities were **positive.**

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IEEE IHTC 2024 – Social Activities

A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity.

IEEE IHTC 2024 – Social Activities

Moments from the Gala Dinner

IEEE IHTC 2024 – Closing Session

Group photo at the end of the conference with the General Chair, the Organizing Committee, some guests and enthusiastic participants (30 November 2024).

IEEE IHTC 2024 - Time for Music!

Petruzzelli Theatre (1898 – 1903), Bari, Italy
the largest historical private-owned theatre in Italy
(1482 seats)

Orchestra Conductor : **Mikhail Agrest**
Piano: **Jan Lisiecki**
Choir Director: **Marco Medved**

Extract from E. Grieg, *Piano Concert op. 16 in A Minor*

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The Role of the Conference Treasurer

Adam Jastrzebski
IEEE Region 8 Treasurer
Region 8, Conference Leadership Program August 2025

Agenda

- The role of the Conference Treasurer
- Timeline
- Budget Building
- Financial and Legal Arrangements
- Contracts
- Payments & Bookkeeping
- Closing & Audit Preparation
- Resources

What is the Role of the Conference Treasurer?

- To ensure the financial success of your event while maintaining alignment with best business practices, relevant regulations and IEEE policies.

- Think like a CFO
  - Set realistic return on expenses (target 20%)
  - What has a key role in defining these targets?
  - While driving toward financial goals, remain aware of:

Financial Planning   **Forecasting**   **Procurement**   **Accounting**   **Audits**

Treasurer Functions

BUDGETING

BOOKKEEPING & AUDIT PREP

VENDOR AGREEMENTS

FORECASTING & ANALYSIS
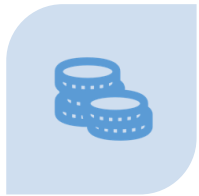
COORDINATING PAYMENTS

TAX COMPLIANCE

FINANCIAL REPORTING & RECONCILING

TRANSFER OF KNOWLEDGE

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Conference Finance Timeline

Budgeting & Banking

-18 to -12 Months

Contracts Negotiations and Signing

-18 to -6 Months

Transaction Processing
(paying deposits and bills, receiving registrations and support funds)

-6 to +1 Months

Closing your Conference

Post Event

0 to +12 Months

22
4

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Budget Building – General Principles

| Use historical information | Consider the nature of your event | Set a target rate of return | Cover your expenses | Build in contingencies | Submit for approval |

Quite often the initially submitted budget is strongly based on historical information and needs to be updated later for actual arrangements.

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Preparing the Budget Details

1) ## Programme outline with the organising team
   a) Objectives
   b) Main Schedule
   c) Receptions, additional attractions (e.g. city tour)

2) ## Budget estimate
   a) How many participants, presenters, invited guests
   b) Potential sponsors and their contributions
   c) Cost of:
      - Accommodation, event venue, AV, meals, reception, transport, attractions
      - Organisation (registration, committee meetings, publications, printing, etc)
   d) Levels of registration fees for different categories of attendees
   e) Scouting local facilities for best prices, preliminary agreements

Financial and legal arrangements (1)

1. **Using specially created IEEE CB account – simplest to operate but may not be possible to setup in all cases. Process managed by IEEE CEE as part of IEEE Conference Application. IEEE CB credit card can be provided for local payments.**

   a) Simple Memorandum of Understanding (MoU) with the proposed budget between the conference sponsors (FCS) and the local OU/committee running the conference. Section should be included.

   b) Sponsors transfer support funds/advances to the conference CB account.

   c) Conference Committee manages organisation of the event, participant registrations and the contracts.

   d) Participant registrations through IEEE vTools with payments collected through PayPal and credited to conference CB account.
   Alternatively, for a charge, managed by CEE using CVent client.

   e) Conference Treasurer executes payments from CB account and maintains financial records and all the documentation.

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Financial and legal arrangements (2)

2. Using existing IEEE Section bank account (CB or local) – easy to setup, but additional admin required and extra coordination between the local OU/committee running the conference and the Section. Most of the process managed by IEEE CEE.

   a) Simple Memorandum of Understanding (MoU) tween the local OU/committee running the conference and the Section, specifying the processes and each side responsibilities

   b) Simple Memorandum of Understanding (MoU) with the proposed budget between the conference sponsors (FCS) and the local OU/committee running the conference. Section is included.

   c) Sponsors transfer support funds/advances to the Section.

   d) Conference Committee manages organisation of the event, participant registrations and the contracts.

   e) Participant registrations through IEEE vTools or other system, with payments collected through PayPal or other system and credited to Section account.

   f) The Section Treasurer executes the payments on authorisation from the Conference Treasurer.

   g) Both Section Treasurer and Conference Treasurer maintain the records and all the documentation.

3. Using existing IEEE bank account (CB or local) of a Chapter or a Student Branch or a local account of non-IEEE organisation (e.g. University). Similar procedure as for 2 above.

4. Using existing local account of non-IEEE organisation (e.g. University). Similar procedure as for 2 above but more complicated agreements and procedures.

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Event and Hotel Contracts

- The general objective of the contract is to specify what both sides are undertaking to do and on what terms.

- There are examples of such contracts on IEEE CEE website (see the Resource page at the end of the presentation).

- Your specific objective is to negotiate the best discounted price for the services **and** the most flexible cancellation and reduction terms.

Event and hotel contracts procedure (1)

1. Specification of your requirements, separated into:
   a) Accommodation
   b) Meeting facilities and catering services

2. Negotiation with the hotel/venue about the facilities, prices and terms of agreement
   a) For accommodation:

   - Anticipated No of rooms each day.
   - Method of room reservation, i.e. through your system or directly with the hotel. Direct reservation with the hotel is the easiest, safest and most flexible.
   - Terms of rooms updating or cancellation. Your aim is maximum flexibility until the last moment.

Event and hotel contracts procedure (2)

b) For meeting facilities and catering services
- Meeting plan with what is required and when
- AV equipment specification
- Detailed costs
- Terms of service requirements modifications or cancellation. Again, aim at maximum flexibility.

c) Payment schedule specification for all the contracts.

3. Hotel/venue produce draft Agreement in English.

4. Check that the Agreement fulfils your requirements and agrees with the negotiated terms. You also make certain that it contains sections such as Force Majeure, Privacy, etc.

5. Send the Agreement to IEEE CEE for their confirmation and approval.

Contract rules as implemented by R8 - 1

- The work/service should always be specified in an Agreement/Contract and/or Purchase Order (PO).

- Usually, PO is preceded by the Quotation from the supplier.

- Expenses should be pre-approved in the event budget.

- For any expense not in the budget, a prior approval of R8 Director or OpCom needs to be sought.

- Below $1k and for obvious cases, where the service is well defined by other means, the PO/Agreement is not necessary (for example, when purchasing access to a generally available internet service on the usual customer terms). The budget holder authorises the payment and the Treasurer executes it.

Contract rules as implemented by R8 - 2

- For the work/services above $1k and up to $3k we should have a Quote and PO, but we could deal with that internally. The budget holder passes the Quote to the Treasurer who issues the PO. After work is done, the budget holder approves the Invoice, the Treasurer double checks it and executes the payment.

- For the work/service above $3k and up to $5k, the process is as above, but we use PO template approved by IEEE Compliance and Legal.

- For the work/service above $5k and up to $25k we need a contract approved by IEEE Compliance and Legal and signed by R8 Director. The Invoice payment follows the procedure as above.

- For the work/service above $25k we need a contract approved and signed by IEEE Compliance and Legal. The Invoice payment follows the procedure as above.

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Payments & Bookkeeping

"Always be closing!"

1 Organize documentation systematically as it is received

2 Reconcile accounts on a monthly basis to identify discrepancies

3 Use bookkeeping software or Excel to track actuals

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Closing Your Conference - IEEE CEE

‣ 1099/1042 Reporting

‣ Indirect Tax Compliance (if applicable)

‣ Surplus

‣ Proof of Closure (within 6 months)

‣ Final Report & Certificate of Accuracy

‣ Audit

Resources

- IEEE CEE website: https://events.ieee.org/
  - Finance & Contracts
    - Building a Budget; Choosing the Right Bank Account; Determining & Accepting Registration Fees; Conference Contracts Guidelines & Templates; Tax Information for Conferences; Tracking Your Transactions; Closing Your Conference; Conference Audit
  - Conference Finance Videos
    - The IEEE Conference Treasurer Role and NextGen; Supporting Documentation for Payments; Cash Management; Tracking Your Transactions; Audit Documentation; Registration Reconciliation

- NextGen Banking: https://events.ieee.org/planning-basics/finance-contracts/choose-bank-account/

- NextGen Contracts: ieee.parleypro.com

- NextGen Expense Reimbursement (Concur): ieee.org/concur
  - IEEE NextGen Training & Resources

- IEEE Payment Manager: payments.ieee.org

- IEEE Center for Learning Excellence (CLE): ieee-elearning.org
  - Conference Education Program

Resources, Forms, & Templates for IEEE Conferences