

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

1

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



1

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) (10 min)
2. **"Welcome message and IEEE strategies"** - Kathleen Kramer (IEEE President) (20 min)
3. **"IEEE CEE Overview and services"** – Marie Hunter (Managing Director, IEEE Conferences, Events & Experiences) and Alissa Maldonado (Senior event planner, IEEE CEE) (20 min)
4. **"Why run an IEEE Conference"**, Tiziana Tambosso (R8 VC-TA) (30 min)
5. **"IEEE Sponsorship Opportunities, Conference Approval, and the Role of Section Conference Coordinators"**, Filippo Sanfilippo (R8 CoCC) (20 min)
6. **"R8 sponsorship benefits and requirements, R8 Steering Committee of R8 flagship/portfolio conferences"**, Ahmed Hassan Yousef (R8 CoCC) (20 min)
7. **"Managing your technical program" (Timeline, scope, peer review, similarity check)"** , Ilhem Kallel (R8 CoCC) (50 min)
8. **"Publication chair role"**, Peter Nagy (IEEE MGA Ad Hoc Committee on Conferences) (20 min)
9. **"The Research and Technology for Society and Industry (RTSI) model – how to engage industries"**, Giambattista Gruosso (RTSI 2024 General Chair) (20min)
10. **"The international Humanitarian Technology Conference - best practices"** Massimo La Scala (IHTC 2024 General Chair) (20 min) (online)
11. **"Treasurer Role and financial issues"**, Adam Jastrzebski (IEEE R8 Treasurer) (30 min)
12. Q&A and interactive session (40 min)

2

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





Conference Leadership Workshop

Tiziana Tambosso

IEEE R8 Vice-Chair Technical Activities

IEEE Region 8 | IEEE

3

3

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)

4

IEEE Region 8 | IEEE

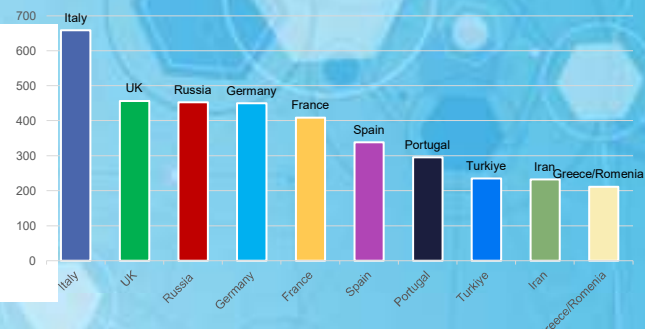
4

Statistics

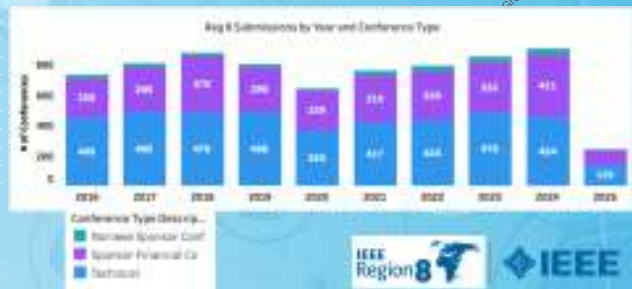
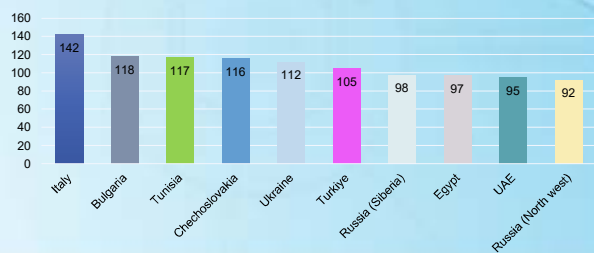
In the last 10 years (2016- March 2025)

- **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



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@ieee8.org

IEEE R8 CoCC website

<https://ieee8.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



7

7

Program

Room Utique, Verdi Tunis Beach Resort, Gammarth - Tunis, Tunisia
(Time zone GMT+1) [Join WebEx meeting](#)

9:00 – 11:00

- “Introduction to R8 CoCC and program” - **Tiziana Tambosso** (R8 VC Technical Activities and R8 CoCC past-chair) (10 min)
- “Welcome message and IEEE strategies” - **Kathleen Kramer** (IEEE President) (20 min)
- “IEEE CEE Overview and services” – **Marie Hunter** (Managing Director IEEE Conferences, Events & Experiences) and **Alissa Maldonado** (Senior event planner - IEEE CEE) (20 min)
- “Why run an IEEE Conference”, **Tiziana Tambosso** (R8 VC-TA) (30 min)
- “IEEE Sponsorship Opportunities, Conference Approval, and the Role of Section Conference Coordinators”, **Filippo Sanfilippo** (R8 CoCC) (20 min)
- “R8 sponsorship benefits and requirements, R8 Steering Committee of R8 flagship/portfolio conferences”, **Ahmed Hassan Yousef** (R8 CoCC) (20 min)

11:00 – 11:30 Coffee Break



8

8

Program

Room Utique, Verdi Tunis Beach Resort, Gammarth - Tunis, Tunisia
(Time zone GMT+1) [Join WebEx meeting](#)

11:30 – 13:00

- “Managing your technical program” (Timeline, scope, peer review, similarity check, plagiarism), **Ilhem Kallel** (R8 CoCC) (50 min)
- “Publication chair role”, **Peter Nagy** (IEEE MGA Ad Hoc Committee on Conferences) (20 min)
- “The Research and Technology for Society and Industry (RTSI) model – how to engage industries”, **Giambattista Gruosso** (RTSI 2024 General Chair) (20min)

13:00 – 14:00 Lunch

14:10 15:30

- “The International Humanitarian Technology Conference - best practices”
- **Massimo La Scala** (IHTC 2024 General Chair) (20 min) (online)
- “Treasurer Role and financial issues”, **Adam Jastrzebski** (IEEE R8 Treasurer) (30 min)
- Q&A and interactive session (40 min)



9

9

Thank you!



10

10

10

Conference Coordination Committee 2025



Rene Garelo
(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 Oliveira (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)



11

11

11



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



12

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

12

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.

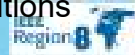
Our Mission

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

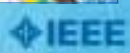


13

13

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.



14

14

14

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 Region 8

IEEE

15

15

IEEE Strategic Plan

2025-2030

OUR MISSION

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

OUR VISION

Support the growth of technology and the engineering profession worldwide and the highest professional contributions of knowledge and innovation to society, industry, academia, and government.

CORE VALUES



OUR GOALS

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

Inspire intellectual curiosity and support discovery and innovation to engage the next generation of technology innovation.

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

Expand public awareness of the significance of engineering, science, and technology play across the globe.

Provide opportunities for technology-related career planning and education, research, and knowledge sharing across industry, academia, and government.

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

Abstract: IEEE is a not-for-profit organization that promotes the advancement of science and technology, and the engineering profession, and the highest professional contributions of knowledge and innovation to society, industry, academia, and government.

www.ieee.org/strategicplan
Version 1.0, 2025-2030

IEEE
Advancing the world
of technology

16

17

18

18

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.



19

19

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.



20

20

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*.

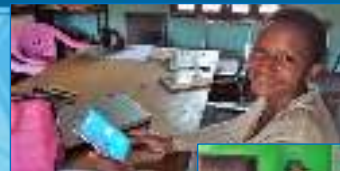


21

21

What Does Success Look Like?

- **Engagement:** Increasing 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 effectively for lasting positive impact.



22

22

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
”



23

23

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.



24

24

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!*



25

25



IEEE

*Advancing Technology
for Humanity*

ieee.org



26

26

Welcome

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

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

27

IEEE PROPRIETARY - for IEEE members and staff

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



27



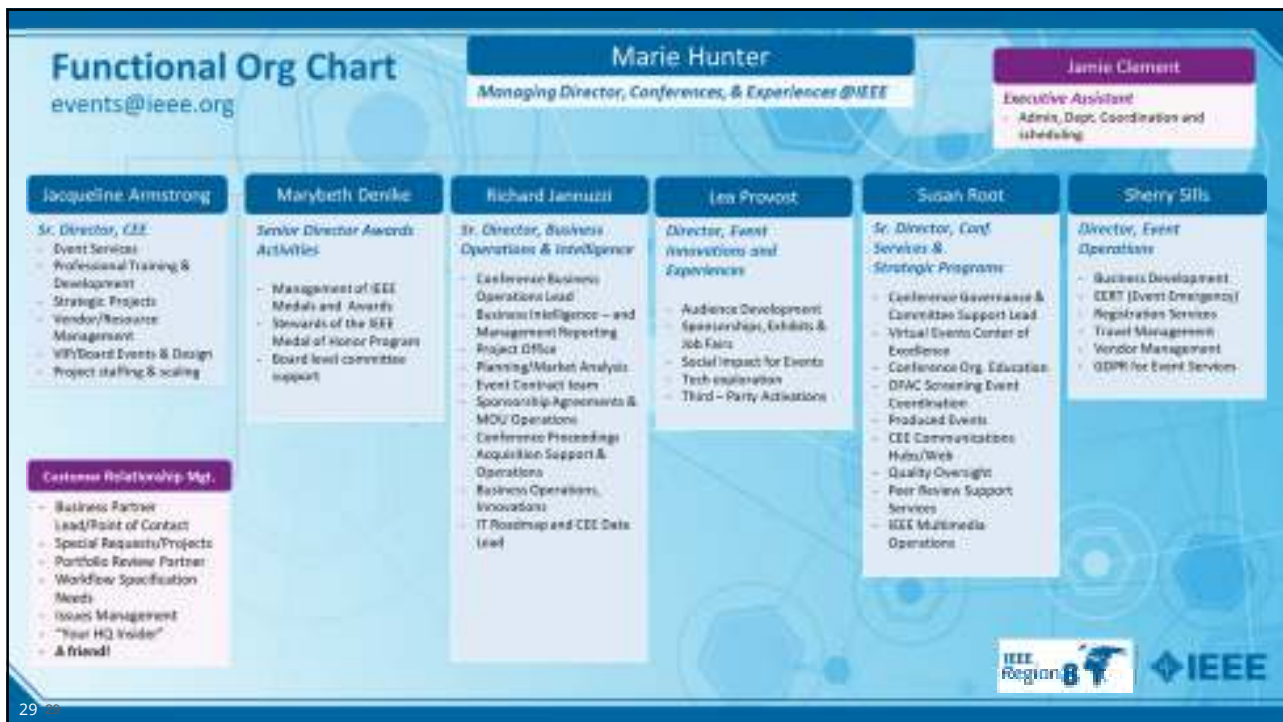
IEEE Conferences, Events & Experiences (CEE)

28

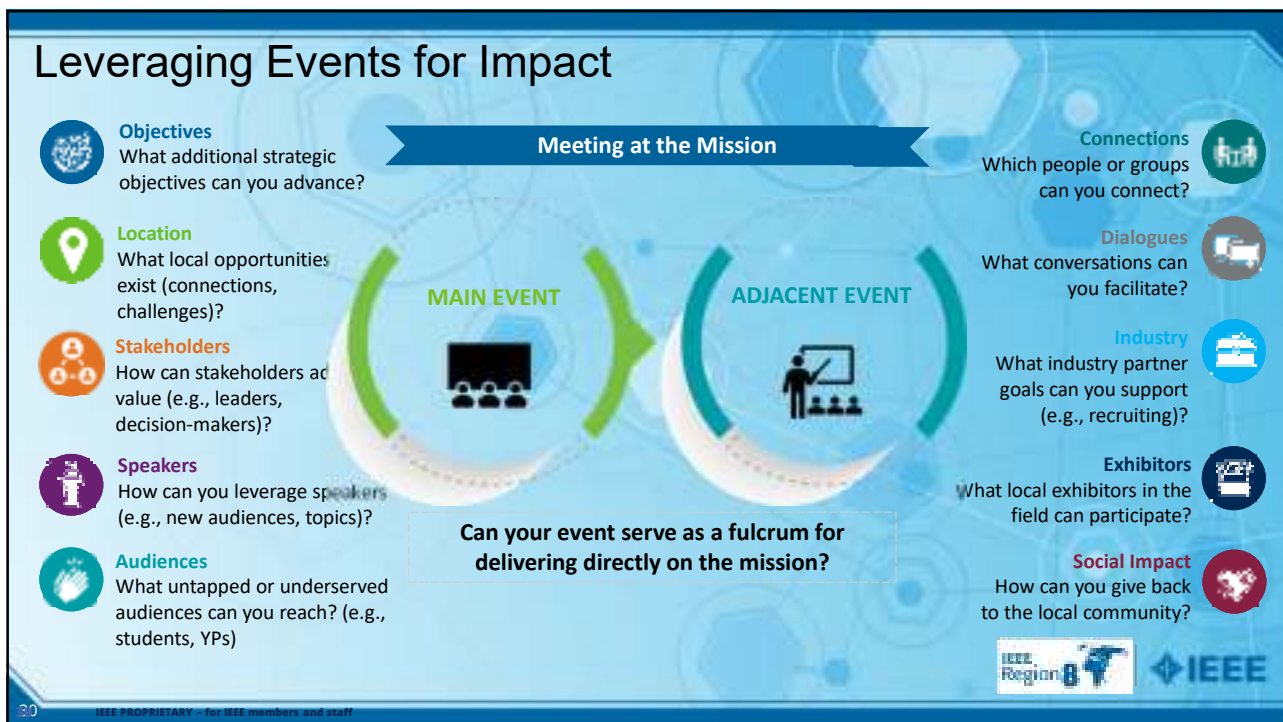
IEEE PROPRIETARY - for IEEE members and staff

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

28



29



30

Events as Organizational Strategic Drivers



31

IEEE PROPRIETARY – for IEEE members and staff



Event Management Services



32

IEEE PROPRIETARY – for IEEE members and staff



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.



Tools & Technology

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



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.



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.



33

IEEE PROPRIETARY – for IEEE members and staff

33

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



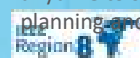
AUDIENCE IMPACT

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



34

IEEE PROPRIETARY – for IEEE members and staff

34

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!



35

IEEE PROPRIETARY – for IEEE members and staff

35

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.



36

IEEE PROPRIETARY – for IEEE members and staff

36

IEEE Preferred PCO Program

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



Current PCO Partners

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



37

IEEE PROPRIETARY – for IEEE members and staff

37

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



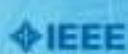
TIME-SAVING SERVICES

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



38

IEEE PROPRIETARY – for IEEE members and staff

38

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



IEEE
Region 8



39

IEEE PROPRIETARY – for IEEE members and staff

39

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



IEEE
Region 8



40

IEEE PROPRIETARY – for IEEE members and staff

40



IEEE
Advancing Technology
for Humanity

ONE IEEE EVENTS

41 IEEE PROPRIETARY - for IEEE members and staff A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity.

41

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.



42 IEEE PROPRIETARY - for IEEE members and staff A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity.

42



IEEE

2025 IEEE JAMAICA TALENT AND TECHNOLOGY EVENT

12 - 13 November

**AC Hotel Kingston
Kingston, Jamaica**

Hosted by the IEEE Jamaica Section

The poster features a yellow and green geometric design on the right side, with two diamond-shaped photo cutouts. The top photo shows a man in a green shirt speaking into a microphone. The bottom photo shows two women looking at a screen. The background of the right side is a scenic view of Kingston, Jamaica.

43



Thank You!

IEEE

44 IEEE PROPRIETARY - for IEEE members and staff A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity.

The slide has a dark blue background with a bokeh effect of light spots. The IEEE logo is in the bottom right corner.

44



Why Run an IEEE Technical Conference

25 August 2025

Tiziana Tambosso - IEEE R8 VC-Technical Activities

45 iee.org © IEEE 2025 All rights reserved

The professional home for the engineering and technology community worldwide

IEEE
Advancing Technology
for Humanity

45

Agenda

- ▶ Reasons to Run a Conference
- ▶ Timing
- ▶ Goal Setting
 - Quantitative
 - Qualitative
- ▶ Getting Started



46

IEEE Region 8 **IEEE**

46

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



47

47

47

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



48

48

48

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



49

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



50

50

50

Getting Started



51 ieee.org



The professional home for the engineering and technology community worldwide

51

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

52



52

The professional home for the engineering and technology community worldwide

54

54

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



55

55

55

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



56

56

Conference Strategies



- ▶ 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?



57



57

57

Section Leadership Role Conferences

58 ieee.org

The professional home for the engineering and technology community worldwide

58

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



59

59

59

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



60

60

60

Key Steps

- ▶ Identify Partners
 - Co-Sponsors
 - Review and vetting process to determine suitability
 - Understand roles, responsibilities and working relationships
 - Contributors / Exhibitors
 - Volunteers
- ▶ Implementation Planning
 - Location and venue needs
 - Communications and marketing
 - Registration
 - Event logistics
- ▶ If you need help, contact CEE



61

61

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)



62

62

Summary

- ▶ Planning process begins 12 to 18 months in advance of conference date for conferences less than 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 draft budget to determine breakeven, as it will help you evaluate if you need a sponsor, which can bring additional attendees

63



63

63

IEEE Governance and Oversight

ieee.org


The professional home for the engineering and technology community worldwide

64

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>



65

65



66

66



TCS/FCS of R8 – Benefits and Requirements

25 August 2025

Ahmed Hassan Yousef
IEEE R8 Conference Coordination Committee member



67

67

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/>




68

68

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 tour 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

69



69

69

Benefits for R8 Conference Sponsorship

	Flagship USD 5k	Portfolio USD 5k	FCS	TCS
Repayable Loan -seed funding (to be returned after conference closing)				
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, Afl, 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		

70



70

70

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	

71

71



Role of R8 steering committee of R8 flagship/portfolio conferences

IEEE
Advancing Technology
for Humanity

72

72

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

73



73

Steering Committee's role – in general

IEEE Region 8 Conferences Coordination Committee Operations Manual

- ▶ 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.

74



74

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.



75

75

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.



76

76

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

77

Region 8



77

77

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



78

IEEE Region 8



78

78

Conference attendees' experience



79



79

79

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)

80



80

80

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>



81



81

81

R8 flagship and portfolio conferences 2026



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

- ▶ IEEE RTSI 2026
Espoo (Finland)
August 19-21, 2026



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

82



82

R8 flagship and portfolio conferences 2027



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

IEEE RTSI 2027

Catania, (Italy)
 6-8 September, 2027



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



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



83

83

84

84

84





TCS/FCS of R8 – Benefits and Requirements

25 August 2025

Ahmed Hassan Yousef
IEEE R8 Conference Coordination Committee member

85



85

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/>

86




86

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 tour 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

87



87

87

Benefits for R8 Conference Sponsorship

	Flagship USD 5k	Portfolio USD 5k	FCS	TCS
Repayable Loan -seed funding (to be returned after conference closing)				
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, Afl, 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		

88



88

88

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	

89

89



Role of R8 steering committee of R8 flagship/portfolio conferences

IEEE
Advancing Technology for Humanity

90

90

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

91



91

Steering Committee's role – in general

IEEE Region 8 Conferences Coordination Committee Operations Manual

- ▶ 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.

92



92

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.

93



93

93

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.

94



94

94

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

95

Region 8



95

95

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



96

IEEE Region 8



96

96

Conference attendees' experience



97



97

97

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)

98



98

98

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>



99

99



99

R8 flagship and portfolio conferences 2026



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

- ▶ IEEE RTSI 2026
Espoo (Finland)
August 19-21, 2026



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

100

100



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



101

101

Thank you

102

102

102





TCS/FCS of R8 – Benefits and Requirements

25 August 2025

Ahmed Hassan Yousef
IEEE R8 Conference Coordination Committee member

103



103

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/>

104




104

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 tour 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

105



105

105

Benefits for R8 Conference Sponsorship

	Flagship USD 5k	Portfolio USD 5k	FCS	TCS
Repayable Loan -seed funding (to be returned after conference closing)				
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, Afl, 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		

106



106

106

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	

107



107



Role of R8 steering committee of R8 flagship/portfolio conferences



108

108

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

109

109



109

Steering Committee's role – in general

IEEE Region 8 Conferences Coordination Committee Operations Manual

- ▶ 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.

110

110



110

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.



111

111

111

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.



112

112

112

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

113

Region 8



113

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



114

IEEE Region 8



114

114

Conference attendees' experience



115



115

115

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)

116



116

116

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>



117

117



117

R8 flagship and portfolio conferences 2026



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

► IEEE RTSI 2026
Espoo (Finland)
August 19-21, 2026



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

118

118



R8 flagship and portfolio conferences 2027



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

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



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



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



119

119

Thank you

120



120

120

IEEE
Advancing Technology
for Humanity

Conferences, Experiences & Events (CEE)

Conference Technical Program Overview

Ilhem Kallel - IEEE R8 CoCC member
IEEE R8 Conference Leadership Workshop
25 August 2025, Gammarth, Tunisia

121 IEEE PROPRIETARY - for IEEE members and staff A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity.

121

Conference Technical Program Overview

© IEEE 2025 All rights reserved

122 IEEE PROPRIETARY - for IEEE members and staff A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity. IEEE

122

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



123

IEEE PROPRIETARY – for IEEE members and staff

123

Managing your Conference Technical Program

© IEEE 2025 All rights reserved

124

IEEE PROPRIETARY – for IEEE members and staff

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



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



125

IEEE PROPRIETARY – for IEEE members and staff

125

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?

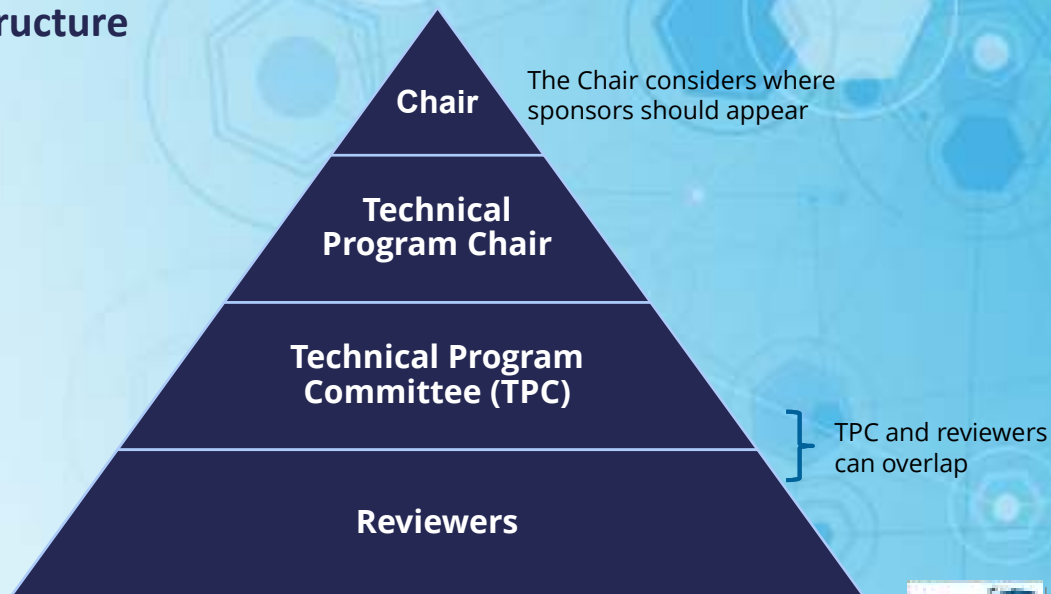


126

IEEE PROPRIETARY – for IEEE members and staff

126

Structure



127

127

Technical Program Development

- Allocate and schedule time for all accepted papers
- **Plan 20 minutes per presentation***
 - **15 minutes for the oral presentation**
 - **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
 - This can be done virtually



128

IEEE PROPRIETARY – for IEEE members and staff

128

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



129

IEEE PROPRIETARY – for IEEE members and staff

129

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 amount of time before being promoted to topic/track chair or eventually serving as program chair.



130

IEEE PROPRIETARY – for IEEE members and staff

130

IEEE Conference Scope

131

IEEE PROPRIETARY – for IEEE members and staff

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



131

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?

132

IEEE PROPRIETARY – for IEEE members and staff



132

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*



133

IEEE PROPRIETARY – for IEEE members and staff

133

How Content is Categorized in IEEE *Xplore* - Suitability

- | | |
|---|--|
| <ul style="list-style-type: none"> • Aerospace • Bioengineering • Communication, Networking & Broadcasting • Components, Circuits, Devices & Systems • Computing & Processing (hardware/software) • Engineered Materials, Dielectrics & Plasma • Engineering Profession • Education Engineering | <ul style="list-style-type: none"> • Geoscience • Nuclear Engineering • Photonics & Electro-Optics • Power, Energy Industry Applications • Robotics & Control Systems • Signal Processing & Analysis • Transportation • Fields, Waves & Electromagnetics • General Topics for Engineers (Math, Science & Engineering) |
|---|--|



134

IEEE PROPRIETARY – for IEEE members and staff

134

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

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

Out-of-Scope

Gray Area

In-Scope

135

How to Conduct the Peer Review Process



136

IEEE PROPRIETARY - for IEEE members and staff

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



136

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



137

IEEE PROPRIETARY – for IEEE members and staff

137

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**



138

IEEE PROPRIETARY – for IEEE members and staff

138

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.



139

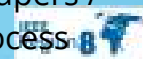
Peer Review Process Systems

- The Technical Program Chair manages this process
 - Selects Paper Management System
- Papers are organized by topical areas
 - Match topics with reviewers' expertise
- Paper assignments are managed within a peer review system (same as paper management system)
 - Reviewers provide feedback to authors
 - 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



140

IEEE PROPRIETARY – for IEEE members and staff



140

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



Region 8

IEEE

141

IEEE PROPRIETARY – for IEEE members and staff

141

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 – 8.2.2.8 (page 39)



142

Reviewer Questions

EXAMPLE: Paper Scoring Feedback

Result 1			
Relevance to the conference	7	Technical strength	4
Originality	6	English writing	4
Overall	6		

Comment:
 This paper mainly shows us the test results 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 matched based on the test results 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



143

IEEE PROPRIETARY – for IEEE members and staff

143

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**



144

IEEE PROPRIETARY – for IEEE members and staff

144

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**



145

145

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



146

IEEE PROPRIETARY – for IEEE members and staff

146

CrossCheck Portal



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

147

147 IEEE PROPRIETARY – for IEEE members and staff

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



147

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 you 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



148

IEEE PROPRIETARY – for IEEE members and staff

148

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



149

IEEE PROPRIETARY – for IEEE members and staff

149

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**



150

IEEE PROPRIETARY – for IEEE members and staff

150

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



151

IEEE PROPRIETARY – for IEEE members and staff

151

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)



152

IEEE PROPRIETARY – for IEEE members and staff

152

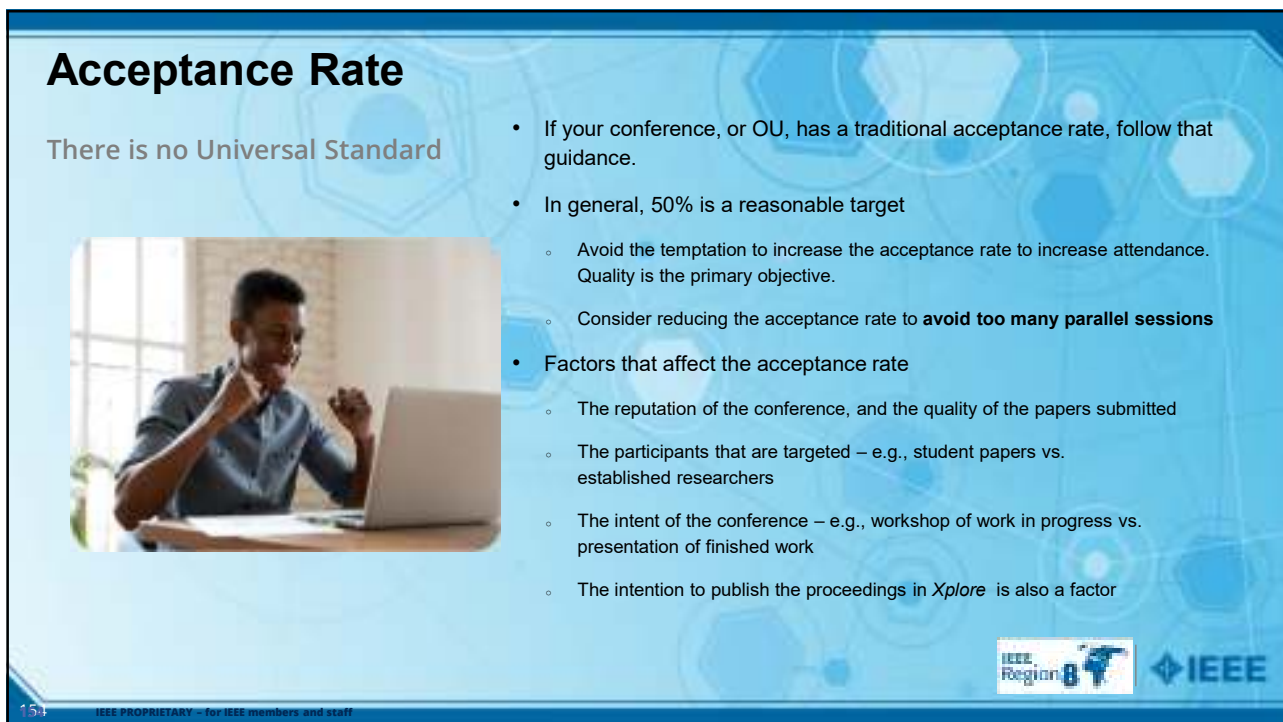


Final Decision

Accepted Papers


153 IEEE PROPRIETARY – for IEEE members and staff A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity. IEEE Region 8 IEEE

153



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

154 IEEE PROPRIETARY – for IEEE members and staff IEEE Region 8 IEEE

154

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



155

IEEE PROPRIETARY – for IEEE members and staff

155

Final Paper Submissions

We aren't Finished Yet!



- 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)



156

IEEE PROPRIETARY – for IEEE members and staff

156

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



157

IEEE PROPRIETARY – for IEEE members and staff

157

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.



158

IEEE PROPRIETARY – for IEEE members and staff

158

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



159

IEEE PROPRIETARY – for IEEE members and staff

159

If you need assistance, please contact CEE's
Customer Relationship Management Team
IEEE CEE Services / IEEE CEE General
Inquiries

cee-services@ieee.org

IEEE
Conferences
Events &
Experiences



IEEE PROPRIETARY – for IEEE members and staff

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

160

THE END?

161

Goal Setting

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



IEEE PROPRIETARY - for IEEE members and staff

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



162

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



153

IEEE PROPRIETARY – for IEEE members and staff

163

Goal Setting - Qualitative

Pick a Subset and Focus

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



154

IEEE PROPRIETARY – for IEEE members and staff

164



Publication Chair Role

Peter Nagy,
IEEE MGA Ad hoc on Conferences

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










165
A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity.

165

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.,









166
A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity.


166

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.

167

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



167

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>

168

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



168

Publication Chair



169

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



169

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.



170

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



170

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

171

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



171

How to Publish

Five Basic Steps

1. Complete the IEEE Conference **Publication Form**
2. Receive confirmation of your publication by IEEE and authorize the **Letter 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



172

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



172

Publication Acquisition



173

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



173

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:

Find the status of a submitted Conference Publication Form:

Register for PDF express:

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>

174

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



174

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 electronic signature confirming intentions of publishing *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

175

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



175

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 City 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.

176

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



176

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>

177

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



177

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

The Conference Publication Program (CPP) assures wide distribution of conference proceedings by providing abstracting and indexing for inclusion in worldwide databases. The CPP makes every reasonable attempt to ensure that abstracts and index entries of content as included in databases provided by independent abstracting and indexing (AI) services. Each AIJ partner makes its own editorial decision. IEEE cannot guarantee entries are included in any particular database.

I want to

Submit/Complete a Conference Publication Form:

Enter conference title or record number:

Find the status of a submitted Conference Publication Form:

Enter conference title or record number:

Register for PDF eXpress:

Enter conference title or record number:

178

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



178

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



179

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



179

IEEE Electronic Copyright (eCF)

The Copyright Transfer Process is Now Automated



ONCE IEEE 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)

180

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



180

IEEE Electronic Copyright Registration (eCF)



181

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



181

The conference is over... now what?

Create & Submit the Final Conference Content



182

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



182

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>

183

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



183

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)



184

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



184

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



185

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



Other Relevant Topics in the Conference Arena

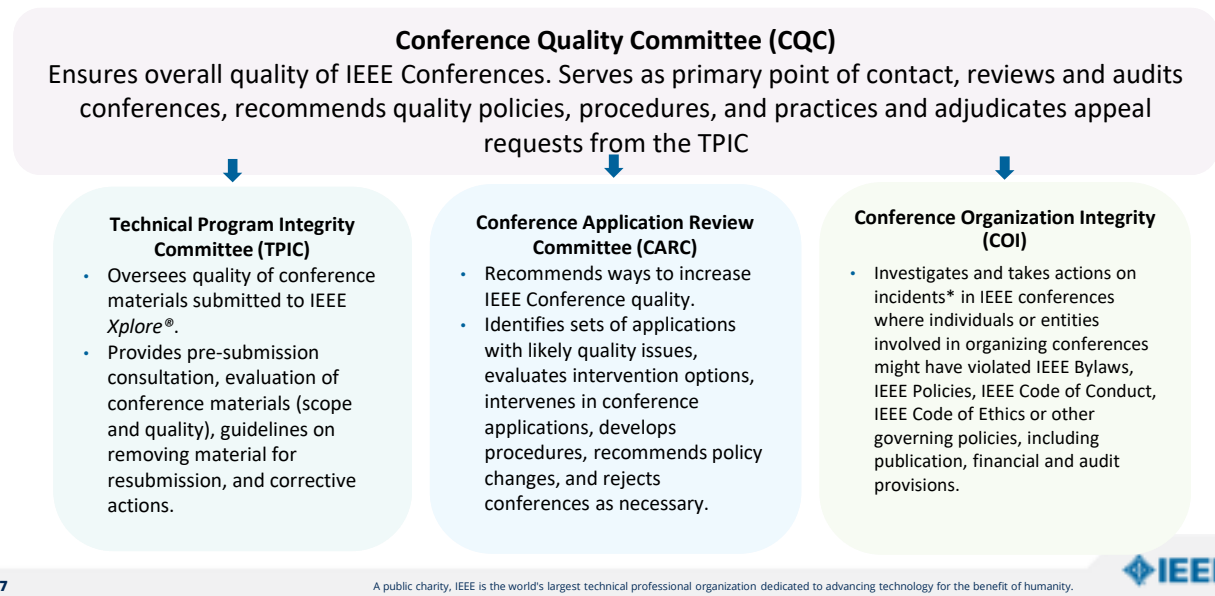


186

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



IEEE Conference Quality Governance



187

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

188

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



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**

189

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



189

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

190

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



190

Thanks!

Peter Nagy

nagy.peter@hte.hu
<https://www.hte.hu/peter.nagy>



191

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



191

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

How to engage industries

Giambattista Grusso – IEEE Italy Section Chair & RTSI2024 General Chair
www.ieee.org



192

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**.

193

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



193

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.

194

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



194

RTSI

History

- **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/>

195

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



195

RTSI

Format

- RTSI is a **FORUM** not only a technical conference (with papers published on IEEEExplore) 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**

196

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



196

RTSI

Financial and Technical Co-sponsors

- RTSI is *Financially Co-Sponsored* by the **Region** ($\geq 30\%$) and the **local Section** ($\geq 50\%$) 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,...)

197

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



197

RTSI

Financial Patrons

- 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**

198

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



198

RTSI

Special Events Involving Students, YP, WIE

- 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**

199

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



199

RTSI

Panel and Workshops

- **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**

200

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



200

RTSI

Tutorial/Others

- **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**

201

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



201

RTSI

Measure of Success

- **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

202

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



202

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

203

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



203

RTSI 2024

Some Suggestions and Best Practices

6 WORKSHOPS

SEPTEMBER 18th

WORKSHOP ON ADVANCING
TECHNOLOGY FOR HUMANITY

INDUSTRY WORKSHOP – AI
IN MANUFACTURING

SEPTEMBER 19th

WORKSHOP ON HUMANOID
ROBOTICS GO UBIQUITOUS!

WORKSHOP ON INNOVATIVE
STARTUPS AND
ENTREPRENEURSHIP

IA: MACCHINE, SERVIZI E
COMUNICAZIONE REPUTAZIONALE

SEPTEMBER 20th

WORKSHOP – THE ROLE OF AI IN CLINICAL ENGINEERING

204

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



204

RTSI 2024

Some Suggestions and Best Practices



205

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



205

RTSI 2024

Some Suggestions and Best Practices

- 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**)

206

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



206

RTSI 2024

Some Suggestions and Best Practices

The Role of Messe Frankfurt: 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.

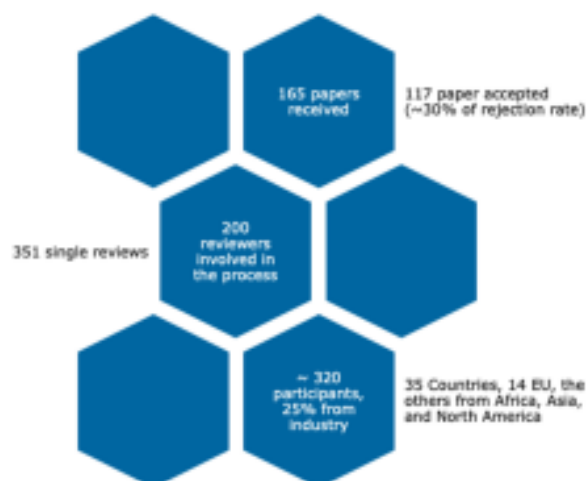
207

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



207

RTSI 2024



7

208

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



208

Thank you for the attention

gruosso@ieee.org

209

www.ieee.org



209



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
Advancing Technology
for Humanity

ieee.org The professional home for the engineering and technology community worldwide

210

210

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



211

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



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

IEEE

212

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



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



213

Financial Co-Sponsors & Financial Supporters

IEEE FINANCIAL CO-SPONSORS



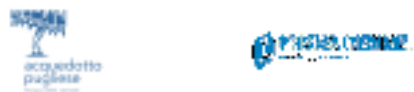
CORPORATE SPONSORS



GOLD SPONSORS



SILVER SPONSORS



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



214

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



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



215

Conference Program

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



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

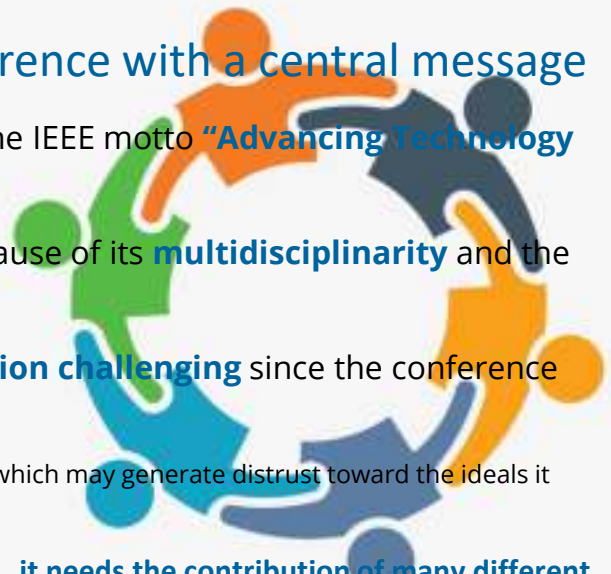


216

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 **multidisciplinary** 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.).



A public charity, IEEE is the

217

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



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



218

IEEE IHTC 2024

How to face the challenge

Utilize the full potential of IEEE and technical co-sponsors

- ▶ 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!



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



219

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**



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



220

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.

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



221

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

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



222

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.

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



223

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, IEEEIC 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**.

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



224

IEEE IHTC 2024 – Promote IEEE Activities

- Some of topics of the conference, such as AI for weather forecasting, energy transition, water scarcity, 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.**

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



225

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.

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



226

IEEE IHTC 2024 – Promote IEEE Activities

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



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



227

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.

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



228

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



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



229

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.



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



230

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

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



231

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 es 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.

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



232

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**.

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



233

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.



234

IEEE IHTC 2024 – Social Activities



Moments from the Gala Dinner

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



235

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).

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



236

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*

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



237

Thank you

for further info

massimo.lascalea@poliba.it

IHTC 2024 website <https://2024.ieee-ihtc.org/>



[ieee.org](https://www.ieee.org)

The professional home for the engineering and technology community worldwide

238

238



The Role of the Conference Treasurer

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



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




239

Agenda

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

24
0

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



240

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

24
1

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



241

Treasurer Functions



BUDGETING

BOOKKEEPING
& AUDIT PREPVENDOR
AGREEMENTSFORECASTING
& ANALYSISCOORDINATING
PAYMENTSTAX
COMPLIANCEFINANCIAL
REPORTING &
RECONCILINGTRANSFER OF
KNOWLEDGE

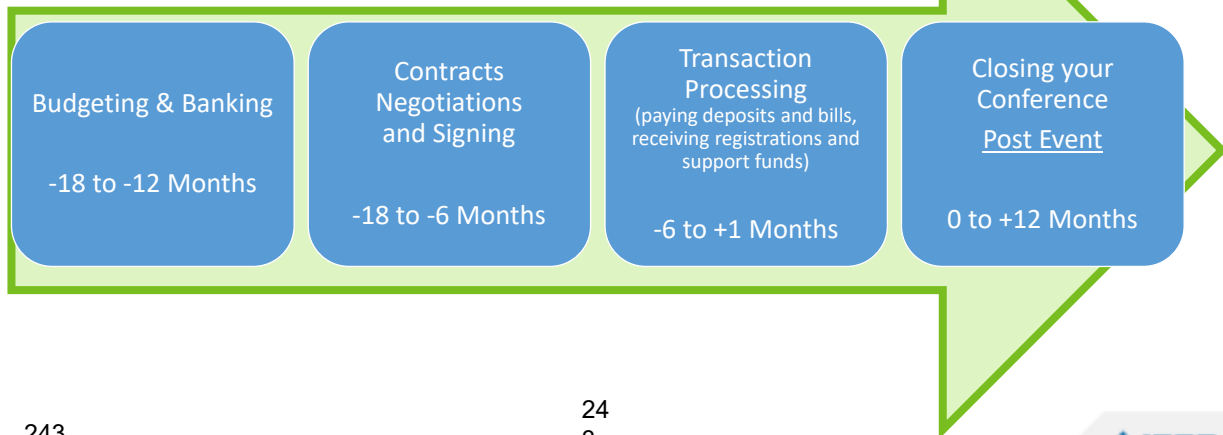
24
2

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



242

Conference Finance Timeline



243

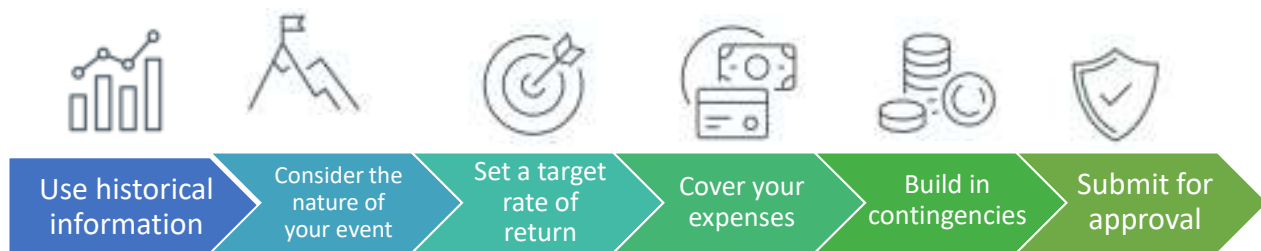
24
3

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



243

Budget Building – General Principles



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

24
4

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



244

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

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



245

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.

24
6

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



246

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) between 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.

24

7

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



247

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.

24

8

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



248

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.

24

9

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



249

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.

25

0

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



250

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.

25

1

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



251

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.

25

2

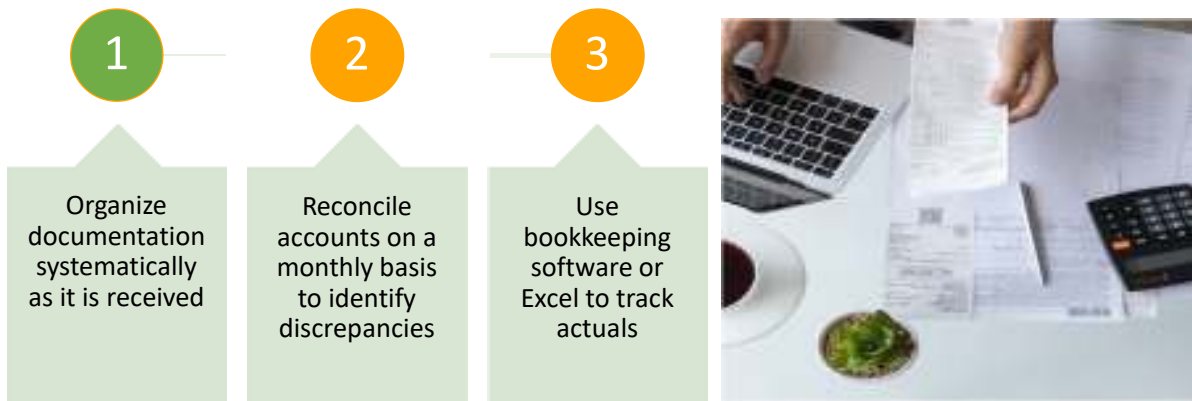
A public charity, IEEE is the world's largest technical professional organization dedicated to advancing technology for the benefit of humanity.



252

Payments & Bookkeeping

"Always be closing!"



253

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



253

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

254

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



254

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](#)

255

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



255

256

Resources, Forms, & Templates for IEEE Conferences

Choose Your Categories

<input type="checkbox"/> Audience Development & Promotion	<input type="checkbox"/> Business & Legal	<input type="checkbox"/> Conference Planning & Management	<input type="checkbox"/> Conference Publications
<input type="checkbox"/> Contracts	<input type="checkbox"/> Education & Training	<input type="checkbox"/> Finance	<input type="checkbox"/> Governing Documents
<input type="checkbox"/> Registration	<input type="checkbox"/> Technical Program & Quality	<input type="checkbox"/> Virtual & Hybrid Events	

 Search Forms & Templates by Keywords


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



256



257