

MCE – Conference Organizer Toolkit

Getting started with conference planning – IEEE Financial Sponsorship

This document summarizes the key steps in establishing a conference that has one or more IEEE organizational units financially sponsoring the event. For more details, see the resources listed.

1. Choose a general chair and conference committee

Every conference has a General Chair, appointed by the sponsoring organization. The chair:

- should be a member of IEEE or of a co-sponsoring organization;
- often selects the conference location;
- appoints the conference committee.

The Conference Committee runs the conference. It holds meetings as needed to ensure that the conference is on track and reports to the sponsoring organization. Most conferences have at least a Finance Chair/Treasurer, Technical Program and Publications Chair.

2. Define the conference topic and scope

The conference committee defines the scope of the conference. The scope should fit within the overall IEEE scope, which includes electrical engineering, computer science, and closely-related areas such as telecommunications, applied mathematics, technical project management, and other engineering sciences (such as life science and physical science) that routinely converge with electrical engineering and computing.

The Technical Program Chair usually leads the process to determine the scope of the conference. The scope will depend on a number of factors, including:

- anticipated interest in the topic;
- maturity of the technology;
- location of the conference;
- potential exhibitors.

3. Set up conference sponsorship

Conference financial sponsors are accountable for the financial, technical, publicity-related or administrative aspects of running the conference. At least one sponsor of an IEEE conference must be an IEEE Organizational Unit (OUs) such as an IEEE society, region, section, chapter, council, or committee. Many OUs have a sponsorship approval process, so be sure to allow adequate time to discuss and reach agreement on sponsorship prior to completing the IEEE Conference Application.

There are several approaches to identify IEEE OUs to partner with. There are 45 IEEE Societies and Councils, each focused on specific technical fields of interest. In addition, IEEE has geographic units throughout the world aligned around Region, Section or Chapter. The key determinant is whether your emphasis is on the field of interest or location.



Types of financial sponsorship:

- **Sole financial sponsorship** - One IEEE organizational unit has complete financial and technical responsibility for the conference. In a sole sponsorship, the rights to the conference name, slogan, copyright for publications, and/or logo are owned by IEEE.
- **Financial co-sponsorship** - An IEEE organizational unit shares significant involvement in the technical, financial, publicity-related, and administrative aspects of the conference with another IEEE organizational unit or a non-IEEE non-profit organization.
 - *For example: IEEE sponsor 80%, non-IEEE organization 20% - surplus or deficit is shared based on upon sponsorship percentage*

Timing: 24 – 18 months prior to conference date.

4. Submit the IEEE Conference Application

Once you have obtained agreement from an IEEE OU to provide financial sponsorship, submit an IEEE Conference Application to register and request approval for your conference from IEEE. Your conference must be approved by IEEE before you can promote IEEE sponsorship or use the IEEE brand. After your conference is approved, your conference will be listed on the IEEE Conference Search and IEEE Call for Papers. How To tutorials are available, see the Resources area of this document

Timing: 18-12 months prior to conference date.

5. Complete the Memorandum of Understanding (MOU) for co-sponsored conferences

A Memorandum of Understanding (MOU) is required when two or more entities agree to co-sponsor a conference. These entities may all be IEEE organizational units or IEEE and non-IEEE organizations that are legally registered as a not-for-profit.

The MOU is generated automatically using the sponsor and other information entered in the IEEE Conference Application. IEEE sends each of the sponsor representatives an e-mail that contains a link to review the MOU and submit their decision.

If the information in the MOU is correct, the sponsor signatory enters his or her name, title, and e-mail address on the form and chooses Approve. The sponsor signatory is the person authorized to enter into contract agreements for the conference. If the information is not correct or needs to be changed, the sponsor signatory chooses Decline and enters details of their objections or other information.

6. Complete the Principles of Business Conduct/Conflict of Interest (POBC/COI) form

All conference committee members involved in making business or purchase decisions for a conference, or other activities that could represent a conflict of interest, must complete the Principles of Business Conduct/Conflict of Interest form.

7. Complete the IEEE Conference Reporting form and workbook

You must submit your conference budget and financial information using the IEEE Conference Financial Reporting form. You will need the conference record number assigned when you submitted the IEEE Conference Application.



Enter the conference financial information in the IEEE Conference Reporting Tool Workbook. This workbook is an optional tool to help organize your conference financial information, prepare your budget, and track finances throughout the conference.

Timing: At least 12 months prior to conference date.

8. Negotiate and review contracts

When running a conference, you will negotiate contracts with various service providers, such as hotels, convention centers, meeting-management services, caterers, and transportation companies. Always consider your conference requirements when negotiating a contract. IEEE provides contract templates and guidance to help you with negotiations.

You must send all contracts to IEEE Conference Contracts. IEEE reviews and executes all contracts with a value of US\$250,000 or greater and will review contracts with a value of less than US\$25,000 upon request.

- If necessary, IEEE Conference Contracts provides feedback and contacts the service provider to renegotiate the contract.
- When negotiations are complete, IEEE Conference Contracts sends the contract to IEEE Strategic Sourcing (formerly Procurement).
- If the contract meets IEEE legal requirements, IEEE Strategic Sourcing signs the contract and sends it to the service provider for their signature.
- After the service provider signs and returns the contract, IEEE Strategic Sourcing sends it to IEEE Conference Contracts, who sends a copy of the contract to the conference organizer.

9. Prepare conference finances

Each conference has a finance chair or treasurer, and large or complex conferences may have a finance committee. They are responsible for all the financial operations of the conference. Before the conference begins, they must:

- submit a conference budget using the IEEE Financial Reporting Form (online form);
- complete the Principles of Business Conduct/Conflict of Interest form;
- open a conference bank account, or obtain IEEE Conference Finance approval of the conference cash-management plan;
- maintain transaction level reporting, suitable for audit purposes (*IEEE provides NetSuite for this purpose*);
- request a conference loan, if necessary;
- comply with indirect or local tax requirements;
- submit the conference committee list for insurance coverage.
- Conferences typically submit their budget to IEEE approximately one year before the start of the event. All IEEE financial sponsors must also submit written approval of the conference budget to IEEE Conference Finance.

The finance committee is also responsible for closing the conference finances, including financial reports, audits, and conference closing.



10. Submit the Conference Publication form

If you plan to submit your conference papers to the IEEE *Xplore*[®] Digital Library, you must submit the Conference Publication form. Even if your application is approved, IEEE can decline to publish any conference proceedings that do not meet the IEEE quality standards.

Timing: At least 6 months prior to conference date.

11. Plan the technical program

The technical program chair defines the scope of the technical program and manages the peer-review process. This includes establishing standards for judging the quality of papers and selecting independent reviewers who are knowledgeable in the subject area of the conference.

A well-balanced, high-quality program will attract more attendees and improve the reputation of the sponsoring organization. While most IEEE conferences submit their conference proceedings to the IEEE *Xplore* Digital Library, conferences cannot claim or guarantee that any papers will be published in IEEE *Xplore* or included in any abstracting and indexing (A&I) databases, since inclusion in such databases is determined by independent A&I service providers. IEEE can decline to publish any conference proceedings that do not meet IEEE scope or quality standards.

The technical program committee helps manage the Call for Papers and all issues related to paper submission, plagiarism screening, review, and selection and the establishment of the final conference program. The committee also manages the presentations delivered at the conference.

12. Manage the production of conference papers

Conference publications include the final program and conference proceedings. The publications chair is responsible for the production of all material that is published in relation to the conference. The publishing process includes providing authors with formatting instructions, collecting author copyright via the eCopyright tool, managing all the details of finalizing papers for publication, and submitting them to the IEEE *Xplore*[®] Digital Library.

If you plan to submit your conference publication for inclusion in the IEEE *Xplore* library, you must request approval and make arrangements with the IEEE Conference Publication Program.

13. Publicize the conference

It's important to build awareness and interest for your conference. By promoting your conference, you can attract more presenters and attendees and increase the prestige of your conference.

The Publicity & Public Relations Chair manages publicity and public relations for the conference through placements in journals, magazines, newspapers, radio, television, and social media. He or she may also manage the Web site and help create a crisis-management and communication plan for the conference. IEEE promotes and publicizes your conference in IEEE Conference Search & Call for Papers once the application is officially approved.



14. Contingency planning

Before the conference begins, prepare a plan for unexpected events, also known as a contingency plan. Emergencies that might occur include: natural disaster, unexpected illness, injury or death, or political unrest. This plan should include ways to communicate with key personnel and coordination with on-site support resources and local authorities. The plan should be reviewed with all volunteers staffing the conference prior to its start.

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IEEE Meetings, Conferences & Events Customer Relationship Management (CRM) team is available to assist you with any questions.

E-mail ieee-mce@ieee.org with questions and concerns, or call:

Toll-Free: +1 855 340 4333 (US & Canada)

Toll: +1 732 562 3878 (Worldwide)

Resources:

Starting a New Conference

www.ieee.org/conferences_events/conferences/organizers/starting_new_conference.html

Setting Up an Annual Conference

www.ieee.org/conferences_events/conferences/organizers/setting_up_annual_conference.html

Explanations of the different types of IEEE Sponsorship

www.ieee.org/conferences_events/conferences/organizers/conference_sponsorship.html

IEEE Societies & Local Units

www.ieee.org/societies_communities/index.html

IEEE Region, Section or Chapter

www.ieee.org/societies_communities/geo_activities/regional_world_map.html

IEEE Conference Application

www.ieee.org/conferences_events/conferences/organizers/conf_app.html

IEEE Conference Application Tutorials – Step by step instructions on completing a new conference application

www.ieee.org/conferences_events/conferences/organizers/conference_education.html

Information about the IEEE Conference Application (info needed prior to submission, etc.)

www.ieee.org/conferences_events/conferences/organizers/conference_application_form.html

Principles of Business Conduct /Conflict of Interest

www.ieee.org/about/corporate/compliance/coiandpob.html



IEEE Financial Reporting Form:

www.ieee.org/conferences_events/conferences/organizers/conf_app.html?pageType=finance

IEEE Conference Reporting Tool Workbook

www.ieee.org/documents/financial_reporting_tool.xls

IEEE Conference Paper Scope and Quality Criteria

www.ieee.org/conferences_events/conferences/publishing/paper_acceptance_criteria.pdf

Plagiarism Screening using CrossCheck

www.ieee.org/publications_standards/publications/rights/crosscheckmain.html

IEEE Conference Publication Form

www.ieee.org/conferences_events/conferences/organizers/conf_app.html?appName=Publication

IEEE eCopyright Tool

www.ieee.org/publications_standards/publications/rights/ecf_faq.html

PDF eXpress/PDF eXpress Plus

www.ieee.org/conferences_events/conferences/organizers/pubs/pdfexpress.html

Contingency Planning:

www.ieee.org/documents/2011_07_23_contingency_planning_confs.pdf

Quick links to forms and templates

www.ieee.org/conferences_events/conferences/organizers/index.html