

IEEE Conference Organizers' Manual



Revised: 22 December 2011

TABLE OF CONTENTS:

INTRODUCTION	4
Welcome	4
IEEE Conferences Committee Statement on Value of Conferences	4
CONFERENCE SET-UP & APPROVAL	5
Determine Conference Scope	5
Select Type of Conference	5
Obtaining Sponsorship	7
MGA Conference Sponsorship Process – Non IEEE Entities	7
Conference Filing Information	9
Cooperation of Technical/Professional & Geographic Entities	9
Chair Selection	10
Conference Committee	10
Building a Committee of Committees	10
SITE SELECTION & APPROVAL	12
Selecting a Conference Location	12
Working with Standardized Hotel Contracts	12
Hiring a Conference Management or Exhibits Management Provider	12
Contract Review	12
Emergency Management Plan	13
TECHNICAL PROGRAM	14
Call for Papers	14
Review Process	14
Confidentiality	14
Clearance of Papers	15
Scheduling	15
Presentation of Papers	15
PROCEEDINGS	16
Conference Proceedings	16
IEEE’s Conference Publication Program (CPP)	16
Conference Publication Form	16
Copyright Requirements	16
Production Costs	16
Pricing	17
Electronic Dissemination of Conference Proceedings	17

FINANCE	17
Preparing the Conference Budget	18
Opening a Bank Account	18
Conference Insurance	19
Obtaining Grant Money	19
Indirect Tax Requirements	19
REGISTRATION	20
Setting the Registration Fees	20
Issuing Visa	20
Accepting Credit Cards for Registration Fees	21
Merchant Accounts	21
EXHIBITS	21
The Exhibits Process	21
Exhibit Space	21
Exhibition Prospectus & Registration	22
Educational Displays	22
Patrons	22
PUBLICITY & PUBLIC RELATIONS	23
Using the IEEE Master Brand	23
IEEE Brand Identity Toolkit	23
Working with the Media	23
Press Passes	24
CLOSE YOUR CONFERENCE	24
Submit Conference Content for Inclusion in Xplore	24
Close Conference Financials	24
Conduct an Audit	25
WHERE TO GO FOR HELP	25

INTRODUCTION

Welcome

Thank you for your interest in organizing an IEEE Conference. This Conference Organizers' Manual is intended to provide a high-level overview of the considerations in planning an IEEE Conference. For more in-depth information, including necessary forms, see the [Conference Organizers'](#) section on the [IEEE.org website](#). For step-by-step information, see [How to Plan an IEEE Conference: Checklist & Timeline](#). These three items- Conference Organizers' Manual, website, and timeline- are designed to be used in conjunction with each other. Links to these resources are placed strategically throughout this document.

Conference Business Services regularly e-mails a newsletter featuring updates, tips and information for IEEE Conference Organizers. This is the primary method of communication between IEEE and Conference Organizers, and helps minimize the amount of e-mails organizers receive. Organizers that are named on an Information Schedule are automatically added. If you would like to subscribe to the newsletter, please contact [IEEE Conference Business Services](#).

Previous committees of your conference, as well as sponsoring Societies, Chapters, Sections and/or Regions, are a tremendous resource.

Conferences requiring the degree of planning addressed here may range from under 100 to one with a sizable number of attendees. This range in size, as well as the variety of styles and traditions developed by the established conferences, precludes one set of guidelines from having universal applicability. Nevertheless, all meetings share the common objective of providing a forum for the communication of advancements in the field of the conference, both through formal paper presentations and informal discussions. Many provide social programs and awards ceremonies within the conference structure, and some include industrial exhibitions as an integral part of the conference. This manual takes as its objective a generic conference of moderate-to-large size, which would include all of these elements. It provides the framework to include all of the elements of conference planning and administration, leaving it up to the individual committee to select and adapt as it sees fit.

Value of Conferences Statement

The IEEE Conferences Committee recognizes the value of conferences as a mechanism for a unique form of personal interchange not clearly available elsewhere in IEEE. The integrity of this important and unique ability to present work in a forum where it can be immediately defended and discussed must be preserved.

CONFERENCE SET-UP & APPROVAL

Determine Conference Scope

Determining the conference topic and scope of that topic is one of the very first steps in planning an IEEE Conference. The topic may be an existing field of interest, a subset of that field, or a new technology. The scope will depend on a variety of factors, including history of the conference, breadth of the field of interest, geographical considerations, maturity of the technology discussed, anticipated attendance, size of conference committee, potential exhibitors, and potential proceedings. Discuss possible conference topics with Societies and/or Councils of overlapping interest, and the Regions and/or Sections in which the proposed conference will take place. It's important to discuss this topic with other IEEE Organizational Units (OUs) that might have an interest in this topic to prevent duplicate or competing conferences, and to utilize all expertise available.

Select the Type of Conference Sponsorship

IEEE supports three sponsorship models for conferences. Sponsorship relates to the responsibilities and accountabilities of an IEEE Organizational Unit, (OU) with respect to financial, technical, publicity, and administrative aspects of a conference. IEEE OUs can provide sponsorship to conferences that includes either financial involvement or non-financial involvement.

Please note: Co-Sponsorship and Technical Co-Sponsorship arrangements require a Memorandum of Understanding (MOU), outlining the roles and responsibilities of the sponsoring entities. [See MOU for more information.](#)

Sole Sponsorship

Sole sponsorship indicates full and sole IEEE Organizational Unit involvement in the conference, including responsibility for the technical, financial, publicity and administrative aspects of the conference. IEEE sponsored conferences must have the IEEE logo and name included in the conference title and all conference publications and announcements. This IEEE Organizational Unit is solely responsible for all local arrangements, exhibits, publicity, public relations and publications.

As a result of sole sponsorship, the IEEE Organizational Unit will:

- approve the conference
- receive the surplus or be liable for any deficit resulting from the conference
- be responsible for assuring the timely resolution of any legal issues

- be responsible for issuing any loans that the conference might need and assuring subsequent repayment
- be responsible for proper usage of the IEEE name and [Master Brand](#).
- planning the scope of the technical program, organize panel discussions, invite special speakers and review and select contributed papers.
- be involved in preparing the conference budget, monitoring the financial affairs and ensuring timely submission of the final financial report.

IEEE sponsored conferences are financially accountable to the sponsoring Organizational Unit(s) and to IEEE Headquarters.

IEEE owns all rights of IEEE sponsored conferences, including but not limited to conference name, copyrights, and/or logo.

Co-Sponsorship

Co-Sponsorship indicates a shared involvement among several entities, one of which is an IEEE Organizational Unit. Co-Sponsorships are between multiple IEEE OUs or at least one IEEE OU and an outside not-for-profit organization.

Note: IEEE Organizational Units engaged in conference sponsorship may not enter into any type of sponsorship arrangement with a for profit organization.

Co-Sponsorship indicates a shared and significant involvement in the technical, financial, publicity and administrative areas of the conference. Co-Sponsored conferences require a Memorandum of Understanding which explicitly defines the relationships between the sponsoring organizations.

As a result of co-sponsorship, the IEEE Organizational Unit(s) will

- approve the conference
- receive a portion of the surplus or be liable for a portion of the deficit resulting from a conference
- be responsible for assuring the timely resolution of any legal issues
- be responsible for issuing any loans that the conference might need and assuring subsequent repayment
- be responsible for proper usage of the IEEE name and the [Master Brand](#) in all conference publications and announcements

Technical Co-Sponsor

Technical Co-Sponsorship indicates direct and substantial involvement by the IEEE Organizational Unit(s) solely in the organization of the technical program. IEEE has no financial involvement in the conference. Technical co-sponsored conferences require a Memorandum of Understanding which explicitly defines the relationships between the sponsoring organizations.

As a result of technical co-sponsorship, the IEEE Organizational Unit(s) may:

- be involved in encouraging members to submit papers and attend the conference.
- assist in publicity through the availability of the appropriate IEEE Organizational Unit(s) mailing lists.
- not use the IEEE name in the conference title
- use the IEEE name and/or Master Brand in conference publications and promotional materials as appropriate

The involved IEEE Organizational Unit(s) may wish to negotiate a variety of issues with the sponsoring organization, including registration fees for IEEE members, possible post-conference sales of proceedings through the IEEE Conference Publication program, and other issues that benefit the conference and the future interaction with the sponsoring organization.

Obtaining Sponsorship

[IEEE Society/Council](#) & [IEEE Region/Section/Chapters](#) sponsor IEEE Conferences. Once your conference scope is determined, contact the appropriate Organizational Unit to discuss sponsorship opportunities.

MGA Conference Sponsorship Process

MGA has implemented a new conference sponsorship process to support the Board of Directors approved motion in May 2011. Sections or Regions must approve sponsorship of conferences when partnering with a non-IEEE entity, whether technically co-sponsored or financially co-sponsored.

Section level approval is required when any MGA OU co-sponsors a conference with an outside entity:

- Applies to all MGA OUs - Subsections, Chapters, Geographic Councils, Affinity Groups, Student Branches, etc.
- Applies to financial as well as technical co-sponsorships

MGA Conference Sponsorship Process Flow – Non IEEE Entity

Conference Organizer requests co-sponsorship from an IEEE entity

IEEE entity requires "Conference Quality Questionnaire" to be completed by Conference Organizer*

IEEE entity uses the Conference Quality Questionnaire to evaluate the quality of the technical program

If IEEE entity desires to co-sponsor Conference, an MOU is created between the sponsoring parties and forwarded to the Section

If Section approves co-sponsorship, MOU is signed by the Section Chair and returned to sponsoring IEEE entity

Conference Organizer is notified of agreement to co-sponsor

MOU is executed by Conference Business Services in Piscataway NJ and conference is entered into IEEE Conference Database

Copy of MOU is forwarded to Region Director for information purposes

Conference Quality Questionnaire

- *Identify structure of Technical Program Committee*
- *Number of members*
- *Roles of members*
- *Details about each reviewer*
- *Describe the direct and substantial involvement of IEEE Co-Sponsoring Entity*
- *Define Review Process*
- *Type of materials reviewed*
- *Reviewer's criteria*
- *Resolution of conflicting opinions*
- *Papers per reviewer*
- *Define Submissions/Acceptance Rate*
- *Describe how papers will be presented at the conference*

Responsibilities of the Co-sponsoring IEEE entity:

- Obtain the proper approvals for co-sponsorship
- Be involved in the technical program
- Ensure technical quality of the conference
- Ensure proper use of IEEE brand
- Ensure that all IEEE policies are followed by the conference organizers

Responsibilities of the IEEE Section:

- Evaluate technical quality of the conference
- Ensure direct and substantial involvement from the co-sponsoring IEEE entity before approving
- Monitor conferences that have been approved for co-sponsorship
- Section chairs may not grant sponsorship approval if they are involved in the non-IEEE entity in any way (approval must be made at the Region level)

Conference Filing Information

Submit the Information Schedule to IEEE Conference Services as soon as possible before the conference (no later than 18 months for large conferences). Early submission of conference information provides for appropriate listing and publication in the web Conference Database Search. This listing gives early publicity to the professional community and aids in avoiding date/subject conflicts with other conferences.

Cooperation of Technical/Professional & Geographic Entities

Successful conferences are based on the strong cooperation of more than one IEEE Organizational Unit(s). For example, the cooperation of technical/professional, and geographic entities is crucial to the success of IEEE technical conferences. Similar cooperation is essential for the organization of Educational or Standards meetings with a Section or a Chapter.

If all IEEE Organizational Unit(s) are involved in the organization of the conference as early as possible - preferably before any arrangements have been made - this may ensure that activities are run smoothly and that volunteers are available to assist in running the conference. It is required that such involvement precedes the selection of the conference location for the conference to receive IEEE approvals.

Chair Selection

Each conference has a General Chair. This Chair is appointed by the sponsoring entities of the conference and is often responsible for selecting the conference location. The General Chair should be a member of IEEE. In conferences of which IEEE is a joint sponsor, Chairs of the Conference Committees should be members of either IEEE or the co-sponsoring organization. The General Chair may also appoint a Vice Chair, Secretary and other individuals to serve on the Conference Committee.

It is the responsibility of all volunteer members of an IEEE activity to consider each item of business where they have a vote or decision of authority in order to determine if a potential or perceived conflict of interest may exist. The Conference Chair and/or OU must be immediately notified of any potential conflict of interest.

The Conference Chair and the volunteer acting as Treasurer must complete and submit a [Principles of Business Conduct and Conflict of Interest \(POBC/COI\) form](#).

Conference Committee

The General Chair will be responsible for appointing members of the Conference Committee. Most General Chairs will also appoint a Proceedings Chair and a Financial Chair/Treasurer. These chairs will report to the General Chair. Depending on the conference size, it may be helpful to establish a series of subcommittees to handle different aspects of the conference planning. The chairs of these committees will serve on the conference committee.

The Conference Committee will hold meetings as necessary to ensure that satisfactory progress is being made and will report regularly to the sponsoring entity.

Building a Committee of Committees

Some conferences choose to establish a series of committees to assist with specific functions. These committees may include: Finance, Program, Publications, Publicity & Public Relations, Registration, Exhibits, Audit, Local Arrangements and others. These committees are merely suggestions; feel free to establish the number and type of committees particular to the needs of a specific conference. Most important in the committee creation process is the clear definition of roles and responsibilities and a reporting structure.

Traditionally, specific committees have held the following roles:

Finance Committee: Hosting an IEEE Conference requires significant financial oversight. Depending on the size of the conference, a committee may be necessary to ensure all financial, tax and audit requirements are met. Some of these requirements include establishing conference bank accounts, indirect tax, insurance and bonding, budget, expenses, financial reports, and conference closing.

Program Committee: The technical program is the cornerstone of an IEEE Conference. The primary objective of the Program Committee is to ensure that a well-balanced, high-quality program is organized and presented at the conference. This objective should influence every facet of its activities, ranging from the completeness of the Call for Papers to the selection and review of every paper, and even to assisting in the scheduling of session rooms and helping with local arrangements for the program.

Publications Committee: The Publications Committee is responsible for the production of all material that is published in relation to the conference (e.g., papers from special tutorial sessions or colloquia, summaries of conference papers, programs, etc.), including the coordination of production logistics.

Publicity & Public Relations Committee: Promotion of the conference throughout the planning process is critical to the success of the conference. This committee gathers, maintains and utilizes lists of media contacts and past and potential attendees for targeted outreach; promotes the conference through placements in various publication calendars and advertisements in IEEE and non-IEEE publications and news media. This committee may also assist with the development of the website.

Registration Committee: Registration is often the first impression attendees have of a conference. This committee develops and implements plans for the conference registration (both advance and on-site) procedures and logistics, including handling of credit card fees, cancellation policy and creation of name badges. (A registration management company may be hired to take the place of a registration committee and report to a member of the Conference Committee.)

Exhibits Committee: When hosting an exhibit area, this committee ensures proper handling of contracts, floor space, exhibitor registration, security and other logistics. (An exhibits management company may be hired to take the place of an exhibits committee and report to a member of the Conference Committee.)

Local Arrangements Committee: Careful planning and location logistics are essential to the success of your conference. This committee works with local vendors, management companies, the conference and other committees in the planning of the conference space, including room set-up, hiring of entertainment, tours, and other local logistics. This committee also works with the local Convention & Visitors' Bureau, if applicable.

Audit: All Conferences where IEEE is the lead sponsor (greater than 50%), and where the actual or budgeted income or expense is US \$100,000 or more, are required to have an independent audit. Conferences where IEEE has greater than 50% financial responsibility with an actual or budgeted income or expense of less than US \$100,000 will be audited on a periodic basis. The Conference Treasurer is responsible for ensuring that an audit of conference financial reports is completed by a representative independent from the conference. Conferences, where IEEE is not the lead sponsor (less than 51%), are encouraged to have their reports and records audited.

SITE SELECTION & APPROVAL

Selecting a Conference Location

Conference site selection is determined by a number of factors, including domestic and international accessibility, meeting and sleeping room requirements, and availability of overflow hotels. It is strongly encouraged that all IEEE conference locations meet accessibility standards for attendees with visible and invisible disabilities. Site selection for a larger conference typically occurs three to five years before the conference date.

See [Addressing the Needs of Your Attendees](#) for more information.

Working with Standardized Hotel Contracts

Standard agreements have been negotiated with several major North American Hotel Chains. The chains and their hotel contact representatives are listed at [Templates of Contracts & Legal Documents](#). When doing business with these chains, please use their specific contract template.

The templates were negotiated to standardize specific legal clauses. "Terms of Sale" (i.e., number of sleeping room nights, room rate, meeting space, concessions, etc.) are to be negotiated with the hotel.

IEEE National/Global Account Representatives are hotel staff working specifically with IEEE. They will work directly with IEEE Conference Organizers to ensure national contracts are honored locally. If planning a conference or meeting at one of these chains, please contact the IEEE National/Global Representative of these hotels first.

Contact [Manager, IEEE Conference Contracting](#), or see [Templates of Contracts & Legal Documents](#) for more information on standardized hotel contracts.

Hiring a Conference Management or Exhibits Management Provider

Some conferences contract outside professional service providers to manage all or part of the conference. Conference service providers are many and provide various types of services. Price ranges vary widely depending on the size and type of conference and the professional level of the services desired. Services can be acquired for a flat fee or a fee may be based on the number of

conference registrants. Conference organizers must be sure that they are receiving the services wanted and needed for the fee(s) being paid. IEEE does not endorse any service providers but IEEE Conference Services can assist in ensuring the contracts conform to IEEE policies.

Contract Review

All conference contracts with a value of US \$25,000 or greater must be sent to IEEE for review and execution. Conference contracts less than US \$25,000 will be reviewed upon request. These contracts may include hotel, meeting management company, exhibit management consultant, transportation, or other contracts negotiated

Send contracts to conference-contracts@ieee.org.

Emergency Management Plan

Please note: in the event of an emergency, refer all press inquiries to [IEEE Corporate Communications](#). (Contact information is included in the Where to Go For Help section.)

There are several instances in which your conference may be interrupted or cancelled. Recent examples include: a volunteer, exhibitor or attendee becomes ill or has an accident at a conference (resulting in injury or death); natural disaster or act of terrorism in your host city; the conference is disrupted or forced to close due to legal action, a disruptive attendee, or the illness of a volunteer.

Develop an emergency response plan as part of your overall conference planning, including a list of contacts. In the event of an emergency, activate the plan, address immediate safety and medical issues, and contact IEEE Operations Center. Once the immediate crisis has passed, follow-up as necessary.

A basic plan should include: Emergency Management Group communication and leadership tree with contact numbers and backup plan if telephone communication is not working, identification of location for onsite command center, identification of vulnerabilities, different levels of emergencies and response to each, host facilities' emergency plans, and a plan to disseminate this information to exhibitors and attendees should an emergency occur.

Contact [IEEE Conference Business Services](#) for more information on creating an Emergency Management Plan.

TECHNICAL PROGRAM

Call for Papers

The Call for Papers is a public solicitation of papers for the conference. It contains the name of the conference, sponsors, location, dates, subject material requested, format, address for submission and contact for additional information.

The types of papers are:

- **Open Call** papers are received in response to the Call for Papers and are reviewed for acceptance.
- **Invited** papers are those specifically requested from well-known authorities. These may or may not be reviewed.
- **Solicited** or stimulated papers are those that result from requests by conference organizers to groups or individuals working in particular areas of interest.

Review Process

The paper review process is key to developing a strong technical program. The process varies by conference and includes the review of papers received through the Call for Papers, and may include the review of solicited and invited papers. Some conferences choose to post their review process on their website or Call for Papers, and if applicable, indicate if the review process is a blind one. (Blind reviews allow for concentration on content, rather than author reputation.)

Submissions are to be reviewed by independent referees who are knowledgeable in the pertinent subject area. The manner of implementation of the process shall be defined by the appropriate governing body (e.g., Society, Region, Section, etc.) of the IEEE sponsoring organizational unit. Conferences held in cooperation with non-IEEE organizations are encouraged to have a similar review process.

IEEE Policy and professional ethics require that anyone with access to conference submissions treat the contents of papers under review as privileged information not to be disclosed to others before publication.

Authors who have submitted abstracts should be notified whether they have been accepted or declined. Authors whose papers have been accepted should be given the specific deadline for the final copy and limitations to paper length, if any. All materials submitted for review should already have all the necessary clearances, including governmental, corporate and academic.

Confidentiality

IEEE Policy and professional ethics requires that referees treat the contents of papers or abstracts under review as privileged information not to be disclosed to others before publication. It is expected that no one with access to a paper under review will make any inappropriate use of the special knowledge which that access provides.

Clearance of Papers

IEEE assumes that material presented at its conferences or submitted to its publications is properly available for general dissemination to the audiences these activities are organized to serve. It is the responsibility of the authors, not IEEE, to determine whether disclosure of their material requires the prior consent of other parties and, if so, to obtain it. In order to ensure that the authors are aware of their responsibilities, signed [IEEE Copyright Forms](#) must be collected for all papers accepted for publication.

Conference organizers should familiarize themselves with two key U.S. Export Compliance Regulations: the [U.S. International Traffic in Arms Regulation \(ITAR\)](#) and the [U.S. Office of Foreign Assets Control \(OFAC\)](#) regulation. These regulations may affect paper distribution.

Scheduling

Sessions may be comprised of panel discussions or papers. Panel sessions generally include a chair and three or four panelists. The format for these sessions is very flexible and is generally determined by the session organizer or chair. Paper sessions typically include presentations of several papers and a question-and-answer period for each speaker.

Some conferences opt to include a set of sessions grouped around a sub-theme of the conference. These sessions should be available throughout the conference, to allow registrants the opportunity to attend only the sub-themed sessions, if they so choose. Organizers may also want to consider multiple presentations of some papers at conferences with concurrent sessions to allow attendees the option to hear all papers in which they have an interest.

Presentation of Papers

Organizers of IEEE conferences are expected to provide an appropriate forum for the oral presentation and discussion of all accepted papers. Organizers should work to minimize author no-shows by ensuring an author has every opportunity to attend and present. This includes making visa information accessible to authors and offering presentation alternatives as the organizer deems appropriate.

In addition, Organizers must clearly communicate the following to all authors prior to or at the time of submission (with special attention on the Call-For-Papers): “IEEE reserves the right to exclude a paper from distribution after the conference (e.g., removal from IEEE Xplore) if the paper is not presented at the conference.”

PROCEEDINGS

Conference Proceedings

The conference proceedings is the publication of papers presented at the conference. A conference may require that papers missing the publication deadline for the Proceedings cannot be presented at the conference.

Once the papers of the technical program have been selected, it is helpful to prepare a clear and realistic schedule which will allow time for further review, correction, and printing of the Proceedings.

Representatives of IEEE Organizational Units (OUs) are not authorized to grant permission to an outside agency to publish IEEE Conference Proceedings. Forward any requests from an outside agency to the [IEEE Intellectual Property Rights office](#).

IEEE's Conference Publication Program (CPP)

IEEE's Conference Publication Program (CPP) handles the acquisition of conference content for post-conference distribution. It provides for the exclusive sales of conference proceedings from conferences sponsored and co-sponsored (either financially or technically) by IEEE Organizational Units (Society/Council, Chapter, Region, Section and/or Board). CPP also handles post-conference distribution for non-IEEE sponsored conferences published by CPS (Conference Publishing Services, a division of the IEEE Computer Society).

This conference proceedings is sold to libraries, corporations, government agencies, individuals and third party distributors. Individual conference proceedings titles are available for sale electronically through the premier IEEE Xplore Digital Library. Sales are handled on a centralized basis, with prices to members lower than those to other customers. Pricing for proceedings are determined by the CPP. Customers can also subscribe to various prepaid Order Plans (subscription packages) offered by IEEE. The CPP has a standing commitment to supply the proceedings of IEEE conferences to several hundred libraries worldwide.

Conference Proceedings are also available through a Create-on-Demand process for single sales of CD/DVDs, USB devices, and print conference proceedings.

Conference Publications Form

Completion of the [IEEE Conference Publication Form](#) enables post-conference proceedings sales to be handled by IEEE, assigns publication identification numbers and establishes a payment schedule.

Copyright Requirements

For conference publications to which IEEE owns the copyright, prospective authors must be provided with an [IEEE Copyright Form](#).

It is the responsibility of each individual author to ensure that all proper clearances are obtained, if required. Any material bearing company or government security classification should not be considered for publication.

All IEEE copyrighted proceedings must have an IEEE copyright statement printed on the reverse of the title page.

Production Costs

The conference should pay for all production costs related to the publication of the proceedings, unless the sponsoring IEEE Organizational Unit has agreed to absorb these costs. The IEEE Conference Publication Program (CPP) may reimburse the conference for the copies it acquires.

Pricing

There are two types of prices for the conference proceedings:

- on-site: established by the conference's Publications Committee
- post-conference: established by IEEE Conference Publication Program.

Because these prices will differ, the conference proceedings should not have a price printed on them.

Each conference will determine whether the conference proceedings will be included in the registration fee or will be sold separately at the conference.

Conferences are encouraged to offer a discounted price on the sale of conference proceedings to IEEE members, compared to the price offered to non-members.

FINANCE

Preparing the Conference Budget

All conferences must submit a budget indicating estimated income and expenses as soon as possible before the start of the conference (at least 12 months for larger conferences). This budget must be accompanied by written approval from the sponsor(s). Budgets for ancillary conferences, short courses, tutorials or expositions held either directly before or following a conference can be included within the main conference budget, as long as they are clearly identified.

All conference budgets submitted for IEEE approval must be based on non-deficit expectations and be set to generate a minimum surplus of 20% over projected expenses. However, on

exception, an entity may choose to budget on a deficit basis, provided the annual total of all conferences budgeted by that entity reflects a surplus. If a conference budget indicates a deficit, a letter of approval from the sponsoring Organizational Unit must accompany the budget when it is submitted to IEEE. A deficit conference budget will only be approved by IEEE if it can be properly justified in regard to the total fiscal situation of the sponsoring Organizational Unit. The budget can be submitted using the [IEEE Financial Web Form](#).

A revised budget may be submitted once the full view of conference income and expenses (including printing, registration, exhibits, etc.) are known. If significant changes are made to the preliminary budget, a revised budget must be submitted with sponsoring OU approval.

Opening a Conference Bank Account

Establish a conference bank account for receipt and disbursement of conference funds. IEEE's [Concentration Banking](#) program is strongly recommended for all conferences where an IEEE Organizational Unit has a financial responsibility. Any non-Concentration Banking account must be opened in the full name of IEEE and the conference. (e.g., "The Institute of Electrical & Electronics Engineers, Inc, d/b/a 2015 IEEE Conference on Plasma Sciences"). It cannot be opened under an individual's name.

The required IEEE IRS Identification Number for U.S. bank accounts is 13-1656633. Conference loans from the sponsors are usually the first deposit.

If the conference has an interest-bearing account principal, then accrued annual interest, account number and the bank name and address must be reported to IEEE at the end of the year in which the interest accrues.

Reminder: Under no circumstances should bank information be posted anywhere on the conference website. Provide contact information for wire transfers, if accepted.

Conference Insurance

IEEE maintains General Liability Insurance which provides coverage for IEEE Financially Sponsored and Co-Sponsored Conferences. IEEE Volunteers acting within the scope of their duly authorized duties are included as additional insureds.

Coverage for an IEEE Conference begins once the [IEEE Conference Information Schedule](#) is approved. Submission of a committee list with the Information Schedule will facilitate the coverage of individual volunteers acting on behalf of the conference.

IEEE does not carry event cancellation insurance; however conferences can purchase individual policies at competitive rates through an IEEE-approved vendor.

Contact the [Insurance Program Manager](#), or see more information on [Conference Insurance Information](#).

Obtaining Grant Money

Historically, IEEE conferences have received grants in support of travel for speakers, travel for participants who would otherwise be unable to attend, support of conference publications and other purposes. Applying for grants should be considered very early in the conference planning process. Successful grant proposals are mailed at least one year before the conference date and take about three to six months to obtain an approval. In the case of travel grant proposal, sufficient lead-time is necessary to be able to offer the grants in the conference promotions. Agencies providing support often have specific rules as to who may be supported and how the funds may be used. It is obligation of those receiving the grants to be certain all these requirements are met.

The IEEE Development Office is not currently providing assistance in identifying potential government agencies or in the preparation and submission of grant proposals. Conferences may choose to work with affiliated universities or other institutions that can facilitate the process.

Indirect Tax Requirements

It is mandatory for all conferences to comply with applicable indirect tax requirements such as Value Added Tax (VAT), Goods and Services Tax GST and Sales Tax. As each country sets its own regulations, handling of indirect taxes can be complex.

To streamline the European VAT process for IEEE Conference Organizers and ensure compliance with existing VAT laws, a comprehensive European VAT handling scenarios flow chart has been developed for each European country where IEEE currently holds conferences. IEEE needs to assure that all conferences comply with the local indirect tax law and some documentation is required for our files.

IEEE International LLC was created to comply with the VAT legalities of each European country and is registered for the VAT purposes in some European countries. IEEE International LLC has the VAT number which can be used for the VAT reporting of the conferences. IEEE International LLC is not VAT exempt in any of the countries outside the US.

For more information on all taxes to which IEEE Conferences are subject, see [Tax & Corporate Information](#).

Please contact [IEEE Conference Indirect Tax](#) for more information, detailed processes and compliance requirements.

REGISTRATION

Setting the Registration Fee

Registration fees for non-members at IEEE sponsored conferences must be at least 20% above the IEEE member fee. Conferences may establish a registration fee lower than the IEEE member fee for the members of sponsoring Organizational Units. At the discretion of the Conference Committee, the IEEE member registration rates may apply to members of non-IEEE co-sponsoring organizations, cooperating organizations or sister societies.

Conferences where IEEE is the sole sponsor must have a reduced fee, waiver of fees, or fee differential for Student Members and Life Members. A reduced conference registration fee may be offered to students, unemployed IEEE members, retired members and special VIP guests, at the discretion of the Conference Committee and sponsoring entity. The individual registration fee for Life Members must be no more than that for students.

The advance registration fee is generally set lower than the on-site registration fee in order to stimulate advance registration.

Establish a specific policy with regard to refunds and clearly state it in the Advance Program and other promotional material.

Accepting Credit Cards for Registration Fees

Due to international regulations mandated by MasterCard, Visa, and American Express, IEEE and its service providers must comply with Payment Card Industry (PCI) Data Security Standards.

In order to follow PCI compliance regulations, IEEE volunteers have limited options when not using PCI compliant third parties to process credit cards.

If hiring a vendor, the contract must clearly state all entities involved in handling and/or holding the conference's credit card money. The vendor must be PCI Compliant in order to process credit card transactions. Request a copy of the company's compliance certificate and submit with the contract for review. IEEE will screen vendors and check for PCI compliance during contract review.

Contact [IEEE Conference Business Services](#) or see more information on [Registration](#).

Issuing Visas

Some embassies may request a conference attendee present a letter from the IEEE Conference to verify their intentions to attend that specific conference. Visa letters should only be issued to attendees and/or speakers who have verified their intention to attend by registering and paying the registration fee.

Applicants may be required to appear in person for an interview as a part of the visa process. Applicants affected by these procedures are informed of the need for additional screening at the time they submit their application and are being advised to expect delays. Therefore, attendees should be advised to apply no later than 3 months prior to the conference.

Conference Organizers are encouraged to familiarize themselves with the visa entry requirements for the country in which their conference is being held.

Contact [IEEE Conference Business Services](#) with any questions about visa requests.

Merchant Accounts

IEEE has an established merchant account and allows IEEE conferences and geographic units the use of this account under certain conditions. This merchant account may provide a means for conferences to process credit card charges.

IEEE can give access to the IEEE merchant account to contracted third-party vendors. The third-party must prove they are PCI compliant and meet certain criteria. Contact [IEEE Meetings and Conference Management](#), for more information about merchant accounts.

EXHIBITS

The Exhibit Process

A detailed budget for the exhibition is a part of the overall conference budget and includes the price schedule for booths and an estimate of the anticipated number of booth sales; costs to secure exhibition area and facilities; related marketing costs; service costs, including storage, utilities, security, etc.

If utilizing an Exhibit Manager, include information regarding the commission schedule and anticipated travel expenses in the conference budget.

Reminder: Submit Contracts for Review

All contracts greater than US \$25,000 must be submitted to IEEE for review. All other contracts will be gladly reviewed upon request.

Exhibit Space

Review the exhibition area for space and utility requirements. Exhibitors' displays will require adequate electric power, telephone and possibly water and compressed air service. Allow plenty of time to set up and tear down exhibits.

The Exhibits Hall can be used for receptions, coffee breaks, and other social functions. If possible, arrange to have the exhibit space near the registration area and session rooms to increase foot traffic.

Any arrangements for conference exhibition space should be provisional and permit cancellation without penalty up to one year in advance of the conference date.

Exhibition Prospectus & Registration

Distribute an exhibitor prospectus at the previous conference. The prospectus consists of general conference information, letter of invitation, patron application, exhibit floor plan and special instructions, if applicable. A registration form and advance program can be added to the prospectus as they become available.

Send advance registration packets to exhibitors approximately five months before the conference. Include exhibitor advance registration form, personalized letter of appreciation, list of exhibitors to date, hotel and exhibits hall layout, action items and passes, if used.

Educational Displays

When appropriate, educational displays -- such as those sponsored by educational or scientific institutions and governmental agencies -- may be set up at the conference. The logistics for these displays should be handled by the Exhibits Committee. Where exhibition space is to be donated on a complimentary basis to related educational, governmental or other non-profit scientific agencies, information concerning the availability of such free exhibition space should be widely publicized in advance. When donating space, it is imperative to clearly identify what costs the conference is absorbing and what fees, if any, will be reimbursed by the recipient.

Patrons

Generally, patrons are companies, organizations or individuals who cannot function as sponsors or co-sponsors, but desire to participate in the conference by more than just attending or exhibiting.

Patrons should be active in the conference technology or be of significant assistance to the Conference Committee. They may participate by hosting a specific function, such as a coffee break, or by performing a necessary service, such as gratis printing or mailing. The fees to be collected from the patron for hosting a function should be appropriate to the cost of that function.

Contact [IEEE Conference Business Services](#) or see more information on [Exhibits](#).

PUBLICITY & PUBLIC RELATIONS

Using the IEEE Master Brand

Consistent, prominent use of the IEEE Master Brand will help enhance the visibility of the IEEE and support your publicity program. To build greater recognition for IEEE Conferences and its activities, display the Master Brand on all print and electronic materials with prominence equal to or greater than other logos. Careful and comprehensive use of the IEEE Master Brand:

- ensures that IEEE organizations, products, services, and print and electronic materials are identified boldly, clearly and consistently as belonging to IEEE
- enhances the IEEE name and reputation, and helps introduce IEEE to potential members and customers
- protects the IEEE name and logo from trademark infringement.

The [IEEE Brand Identity Standards](#) provide detailed instructions on using the IEEE Master Brand.

[Download the IEEE Master Brand.](#)

IEEE Brand Identity Toolkit

An online brand identity toolkit is available to assist IEEE Volunteers in using the Master Brand. It is especially useful to IEEE Conference Volunteers, as in addition to providing Master Brand guidelines, the toolkit includes letterhead, stationary templates and event/flyer templates that can be customized to promote IEEE Conferences.

Also in the toolkit is the link to the popular IEEE One Voice video which can be used at conferences or as a sales piece in soliciting sponsors or exhibitors. See more information on the [IEEE Brand Identity Toolkit](#).

Working with the Media

Frequently, free publicity can be secured in local newspapers, magazines or newsletters, and on local television and radio public service announcements. To expand publication opportunities, consider non-traditional media, such as blogs, social networking sites and online news services. These types of media should be contacted both by press releases and follow-up phone contact. Check the medium's website for contact information.

Press Passes

Invited press will expect free admission either to the entire conference or to select keynote and social events. If inviting press, provide passes at the registration desk, and name badges noting the reporter's publication. Provide a press kit to each reporter with a conference program, biographies of key committee members and speakers, copies of key speeches, an up-to-date release, and other pertinent information. Designate a volunteer (from the Publicity & Public Relations Committee, if applicable) to be available throughout the conference to answer questions.

Reminder: Questions pertaining to IEEE, and not the individual conference, must be directed to [IEEE Corporate Communications](#).

CLOSE YOUR CONFERENCE

Submit Conference Content for Inclusion in Xplore

Submit conference content (Xplore-compliant CD and other media types) to IEEE Conference Publications. Be sure to follow the instructions provided in the Letter of Agreement, which you should have received shortly after the submission of your Publication Form. If you did not receive your Letter of Acquisition, contact IEEE Conference Publications immediately.

Contact [IEEE Conference Publications](#) or see more information on [Preparing Conference Content for the IEEE Xplore® Digital Library](#)

Close Conference Financials

Conference loans are to be repaid within one month after the conference. Conference bank accounts are to be closed and the funds distributed immediately after the conference. All payments to individuals and/or unincorporated businesses for goods or services provided to the conference must be reported at the end of the year to IEEE Conference Finance using the [1099 & 1042 Schedule of Payments](#). A [Certification of Accuracy](#) must be submitted with the conference closing financials.

When repaying loans and distribution of surplus, indicate the name and dates of the conference on all checks. Contact [IEEE Conference Finance](#) or access necessary forms on the [Required Documentation](#) page.

Conduct an Audit

All conferences where IEEE is the lead sponsor (greater than 50%) may be required to have an independent audit. An audit of conference financial reports is to be completed by a representative independent from the conference. Conferences where IEEE is not the lead sponsor (less than 51%) are encouraged to have their reports and records audited.

Contact [IEEE Conference Finance](#) or see more information on [Financial Management & Reporting](#).

WHERE TO GO FOR HELP

Conference Business Services	+1 732 562 3878	conference-services@ieee.org
Conference Finance Services	+1 732 562 3878	conference-finance@ieee.org
Conference Publications	+1 732 562 3872	confpubs@ieee.org
Conference Contracts	+1 732 562 6826	conference-contracts@ieee.org
Conference Indirect Tax	+1 732 562 6608	conference-tax@ieee.org
Insurance	+1 732 562 5541	ieeeinsurance@ieee.org
Computer Society Press*	+1 202 371 0101	help@computer.org
Express Conference Publishing*	+1 732 562 3963	conferencepublishing@ieee.org
Meeting & Conference Management*	+1 732 981 3428	mcminfo@ieee.org

(*offers services at competitive rates)