

INSPIRING our LEADERS of TOMORROW

IEEE Conference Update

Sections Congress – Amsterdam
22-24 August 2014

William Moses - Chair, IEEE Conferences Committee
Carl Debono

IEEE
SECTIONS
CONGRESS
/// 2014

Summary:

Conferences Support MGA Mission

- Members engage with other members and non-members with similar interests
- Offer opportunities for professional growth and networking
- Build stronger relationships among the geographic units
- Provide unique opportunities for acquiring new members
- Opportunity to engage local industry and better support the practitioner
- Improve OU finances

MGA Should Pay a LOT of Attention to Conferences!

Agenda

- Conference Business Update
- Current Topics in IEEE Conferences
- Policy Update
- Opportunities for Organization Units & Conference Organizers
- Resources Available to Conference Organizers
- Looking Towards the Future

Conference Business Update

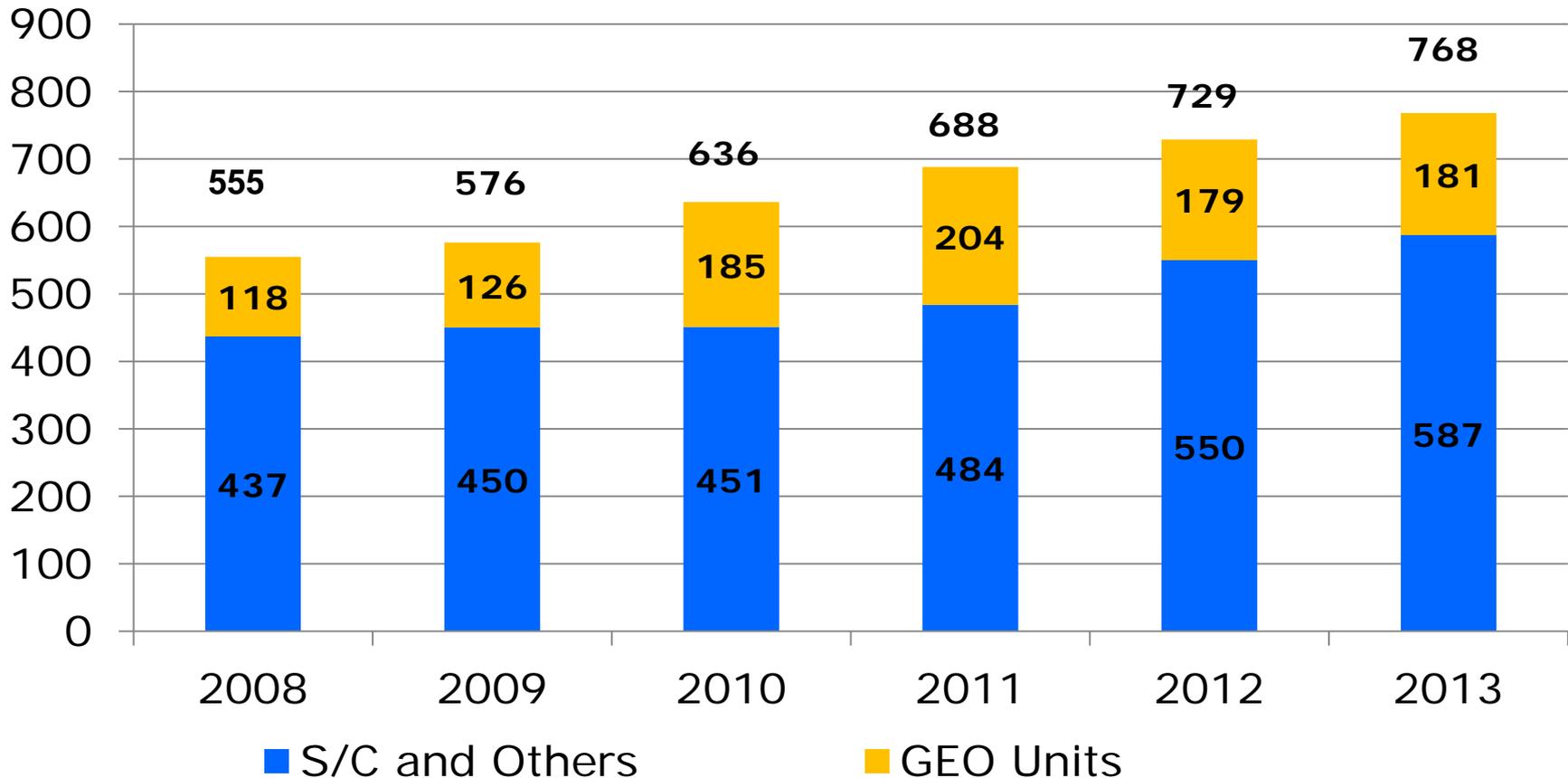
IEEE Global Conference Business

- ▶ In 2013 IEEE....
 - Sponsored 1489 conferences (75% in R7-10)
 - 768 financially sponsored approved (62% in R7-10)
 - 721 technically co-sponsored approved (89% in R7-10)
 - In 93 countries
 - Partnered with over 1000 non-IEEE entities
 - 75% of all IEEE Conferences are co-sponsored
 - 88% of those are co-sponsored by a non-IEEE entity
 - Estimated over 425,000 attendees
 - 249K financially sponsored conferences
 - 176K technically sponsored conferences
 - Acquired 1362 conference proceedings
 - Conferences generated \$153.9M in revenue



Thank
you!

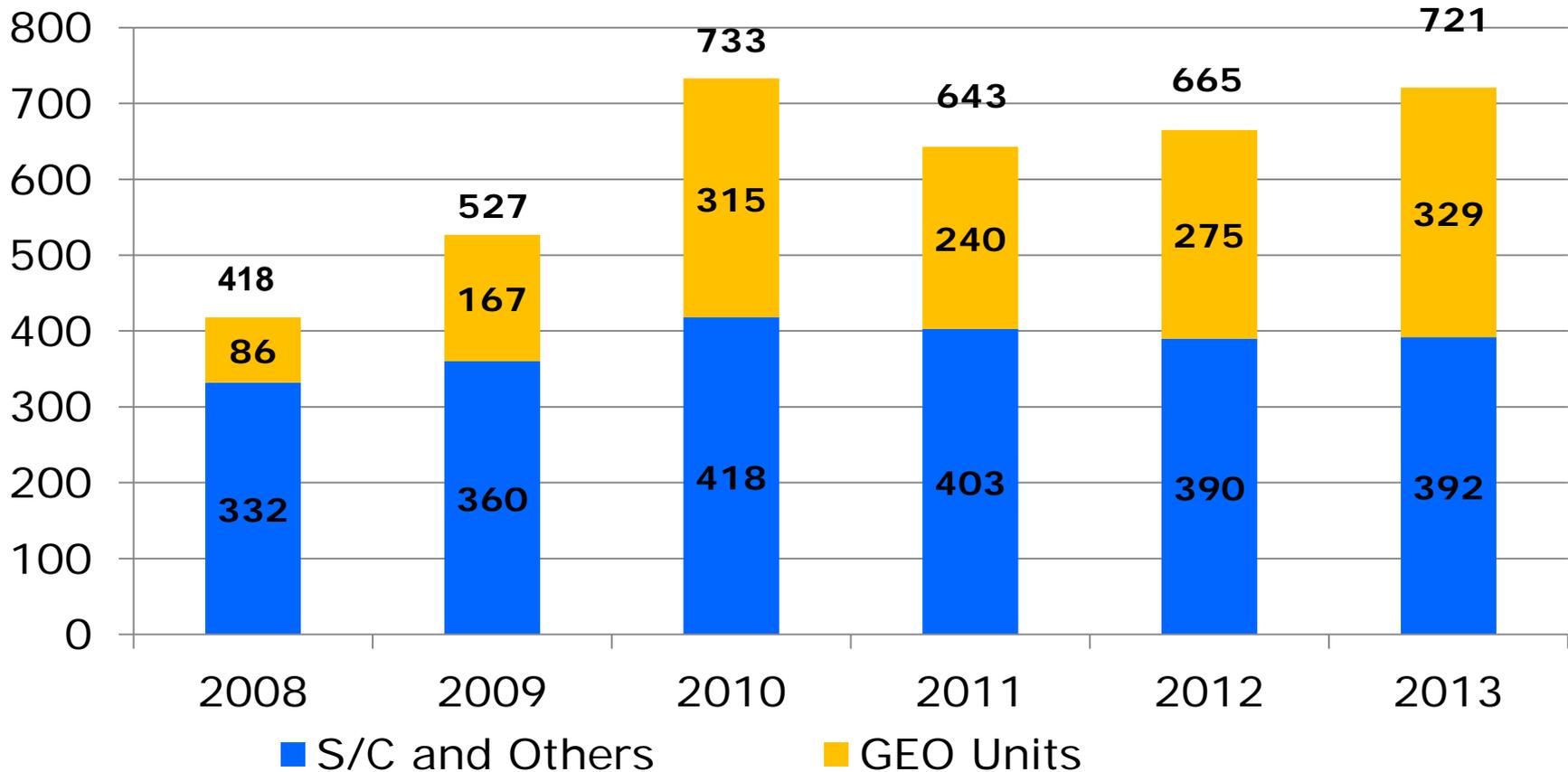
IEEE Financially Sponsored Conferences Numbers by Societies/Councils and MGA



34% Growth since 2008
Society/Council financial sponsorship

53% Growth since 2008
MGA financial sponsorship

IEEE Technically Sponsored Conferences Numbers by Societies/Councils and MGA

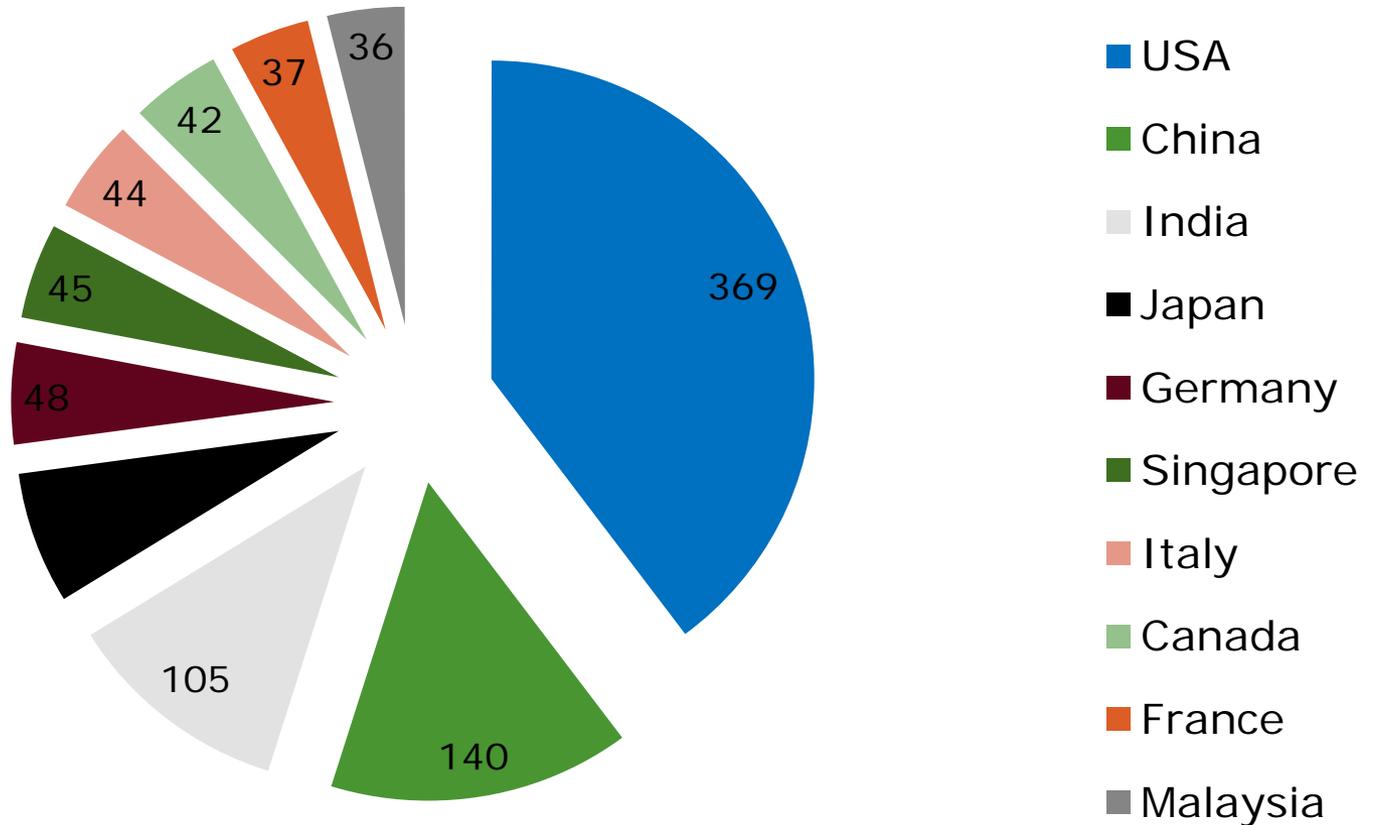


18% Growth since 2008 in S/C technical co-sponsorship

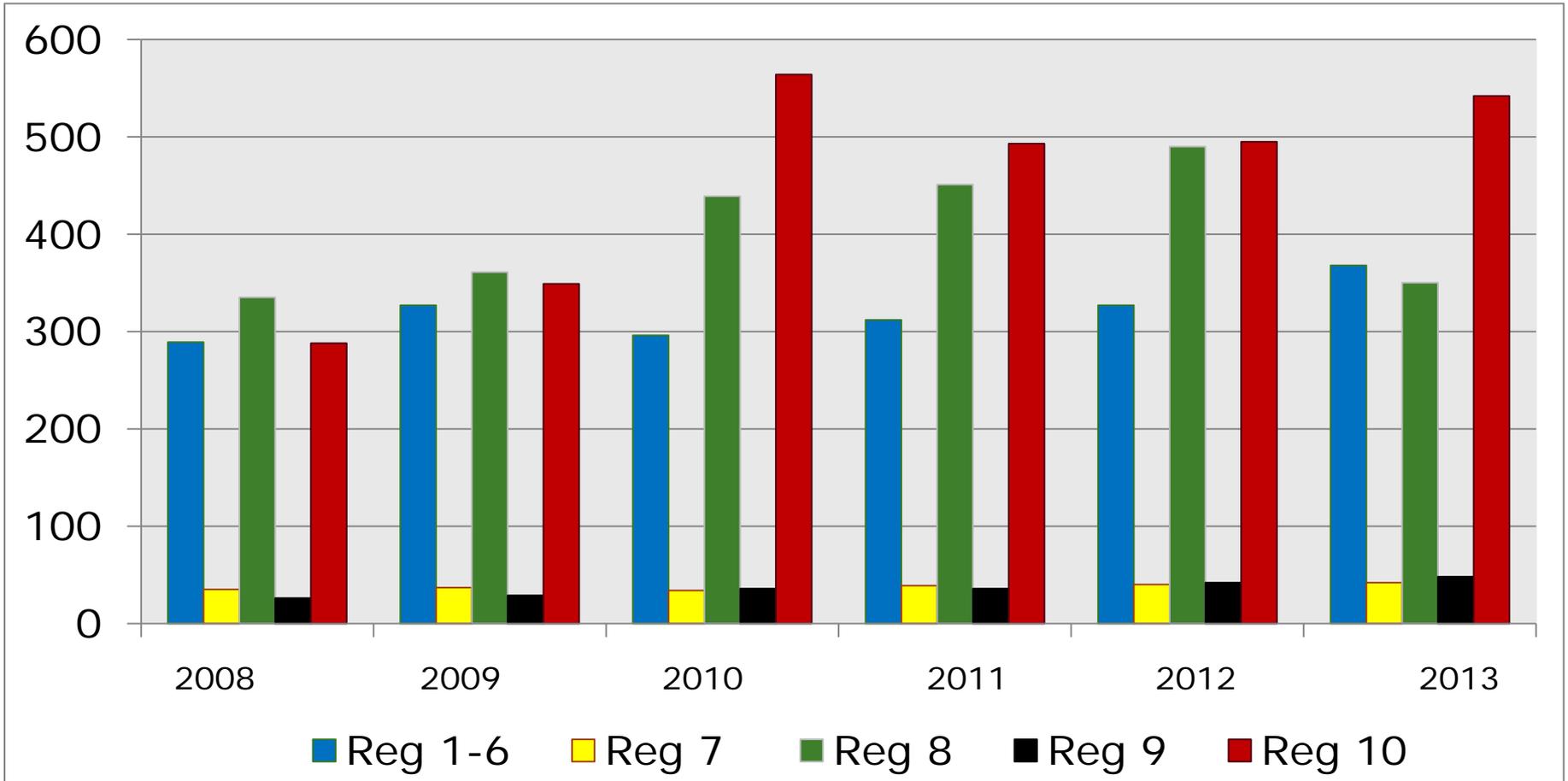
283% Growth since 2008 in MGA technical co-sponsorship

2013 Top 10 Locations

Conferences Held by Country



Conference Location by Region 2009 thru 2013



We Are Very Grateful To You...

- The dedication of conference organizers is a major asset of IEEE
- The amount of volunteer work done is immense
- This work is done out of dedication to the professional community and the public
- The rewards are intangible
 - Service to the community
 - Proliferation of knowledge
 - Advancement of science and technology

Current Topics in IEEE Conferences

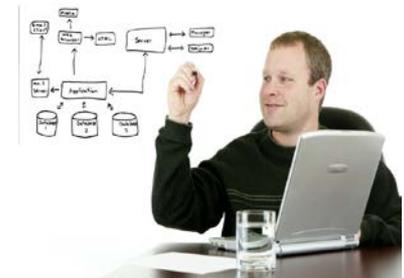
The IEEE Brand

A Powerful Global Asset

- ▶ A **brand** is the set of perceptions and images that represent an organization, product or service.
- ▶ The essence or promise of what will be delivered or experienced.
- ▶ Effective branding can generate emotional connection.



IEEE Conference \equiv High Quality Conference



Why is IEEE Sponsorship Desired by Other Organizations?

- Organizations want their conferences to be aligned with the preeminent collection of engineers and scientist in the world
- The IEEE brand brings immediate credibility and establishes a quality expectation of a conference
- The conference will be promoted in IEEE conference search which dramatically increases the organization's reach to potential attendees (increase revenue)
- Conference proceedings may be eligible for publishing in IEEE Xplore®

Many Aspects Involve the IEEE Brand

Partnering with Organizations Has Benefits for You & Your OU

- Networking with peers, sharing of technical knowledge
- To increase conference attendance and revenue surplus
- Community building, stimulates convergence of thinking across disciplines
- To obtain additional resources to aid conference planning and execution
- Learning from others, seeing how other organizations execute events and conferences
- Spread the risk and organizing efforts

We Must Protect the Brand!

- ▶ Our good name is all we have...
- ▶ Cooperation with other organization is good, but it should be done in a way that serves the purposes of IEEE and protects IEEE's ability to continue its leading role in advancing technology for humanity
- ▶ We need to be on the guard against...
 - Cooperation that transfers IEEE tangible or intangible assets to other organizations
 - Asymmetric cooperation that uses IEEE assets to enrich or advance other organizations
 - Use of IEEE's name without adhering to IEEE quality standards

Conference Quality

- ▶ Many quality issues in recent years
 - Inadequate review process
 - Content outside of conference or IEEE technical scope
 - “Pay-to-Publish” behavior (e.g., mostly no-shows)
- ▶ High-level response from IEEE
 - Content from 10% of IEEE conferences screened
 - Revised conference approval process
 - Increased communication and training
- ▶ Mostly occurs
 - Rapidly developing portions of world
 - Technically Co-Sponsored conferences



What Can *You* Do?

Run high quality conferences!

- ▶ Vet conferences carefully before granting TCS
- ▶ Don't grant TCS and then ignore
- ▶ Require and maintain
"Direct and Substantial Involvement"
- ▶ Communicate with your chapters
- ▶ Don't promise that content will be in Xplore[®]
- ▶ Respond to inquiries from MCE Staff
- ▶ Report suspicious activity to tpii@ieee.org

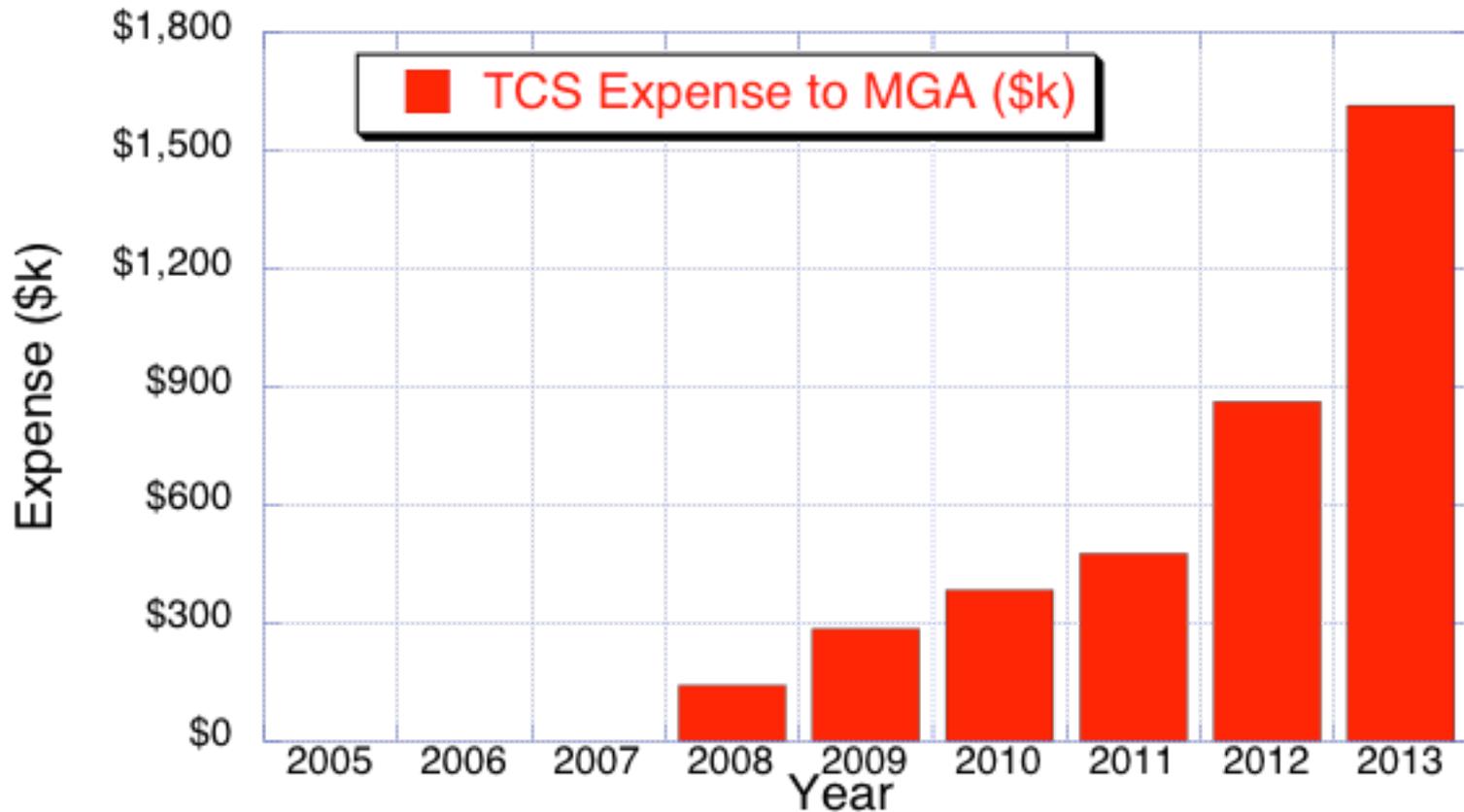


What Should You Know About Your Co-Sponsors?

- ▶ Not-for-profit?
- ▶ Do they share a similar mission as your OU/IEEE?
- ▶ What is the basis for co-sponsoring?
- ▶ Will they add value to the conference?
- ▶ What is their reputation and brand?
- ▶ Do they have complementary resources, skills talents?
- ▶ Can you forge a good working relationship? In good times & difficult times?
- ▶ Are you aligned on conference goals, responsibilities and assignments?



Significant Costs With Technical Co-Sponsorship



- Each TCS Conference Causes \$5400 in MCE Costs
- MGA Charged This Cost Each Time It Grants TCS

Policy Update

MGA Co-Sponsorship Approval Process

- ▶ New Process initiated January 2012
- ▶ Subsections & Chapters come to the Section for approval
 - Sections follow their own approval process
- ▶ Granting co-sponsorship has implications for you
 - TCS conferences **are** IEEE conferences
 - We **all** are responsible for maintaining the quality of IEEE's brand and reputation
 - Ensure that all conferences you co-sponsor or approve for co-sponsorship use quality practices
 - Technical co-sponsorship means **active** engagement in the technical program and conference quality
- ▶ If you are aware of suspect practices, please reach out to us (tpii@ieee.org)

Approval Process Suggestions

- Before approval, IEEE volunteers should investigate conference to ensure that IEEE policies will be followed.
- After approval, volunteers should maintain involvement & verify that policies are actually being followed.
- Arms-length approval process — the volunteers who are involved with the conference should not control (or be) the approvers.
- Effective hierarchy necessary—well-defined structure for receiving periodic reports and reporting problems.

Check Out On-Demand “Sponsorship” Education Module

Cross Endorsements

IEEE Policy 10

- ▶ Cross endorsement is the endorsement from one organizational unit for another organizational unit's conference.
- ▶ It is recommended [that] cross endorsement be sought from the Section, when a conference is being held in the geographic area of the Section if the conference is sponsored by another IEEE geographic organizational unit.
- ▶ Cross endorsement is expected to be timely and should be requested during the planning stages of the conference.

In General, Geo Units Should Only Hold or Co-Sponsor Conferences that are Held Within Their Geographical Area

Cross Endorsements (Cont.)

- ▶ Conferences Outside Geographic Area Sometimes Allowed
 - Long-standing relationships that alternate between locations
 - Close to borders between regions
- ▶ Local Geo Unit Can Prevent a Conference Sponsored by Another Geo Unit from Being Held in its Area
 - Needs to provide a good reason
 - Arbitrated by the Region, if necessary

Recent MGA Policy Change

Plagiarism Screening Will Be Required Soon

- ▶ BoD mandate: all IEEE Xplore[®] content must be checked for plagiarism, effective 2016
- ▶ CrossCheck tool supplied at no charge (for now)
 - Only to conferences where IEEE holds copyright
 - Significant effort needed to analyze output
- ▶ Not mandatory yet, but *all* conferences should *seriously* consider using this!



Sign Up At <https://crosscheck.ieee.org/crosscheck/>
Contact: Bill Hagen — w.hagen@ieee.org

MGA Conference Opportunities

Develop Events for Practitioners

- ▶ Conferences are communities of engineers: great for promoting IEEE and recruiting
- ▶ These events can provide networking, education, career development & personal recognition opportunities
- ▶ Conferences provide revenue for your OU
- ▶ **Develop “events” geared towards practitioners!**
- ▶ Don't focus on hosting scholarly conferences (scholarly conference market ~saturated)
- ▶ A practitioner-based “product line” augments, instead of competing with, existing IEEE conference products



What do Practitioners Want?

▶ Connections

- CEO's want to connect with technology thought leaders
- Entrepreneurs want to connect with technologies & investors
- Job seekers want to connect with employers



▶ Jobs

- Career Fairs
(Information on employment trends, resume writing, interviewing, where are the jobs?, etc.)
- Job Fairs
(Matching up employers and job seekers)

Practitioner Focused Examples

New Style Events

- ▶ “Individual Growth & Professional Development” Events
 - Arizona State University chapter of IEEE Eta Kappa Nu
 - Dream Jobs: four panel speakers, session on salary negotiations
- ▶ Networking Events
 - Women in Engineering: 200 person event whose main goal is networking
 - Networking “Meet-Ups” with Geek Girls
- ▶ Thought Leader / Industry Trend Events
 - Computer Society “Rock Star” Series: CEOs & CTOs come to hear invited speakers discuss technology trends
- ▶ Interactive Events
 - Technology Time Machine: attendees work in groups to envision the future of various technologies
- ▶ Public Policy Development Events
 - Smart Cities: attendees create white papers on key technologies to help influence local, national & international public policy

How Do I Get Started?

- ▶ IEEE MCE (Meetings, Conferences, and Events)
- ▶ MCE has vast experience in all phases of the conference planning process
- ▶ Expertise in developing and planning these New Style Events
- ▶ Many services available to your OU at no charge



Reach Out To the MCE Team

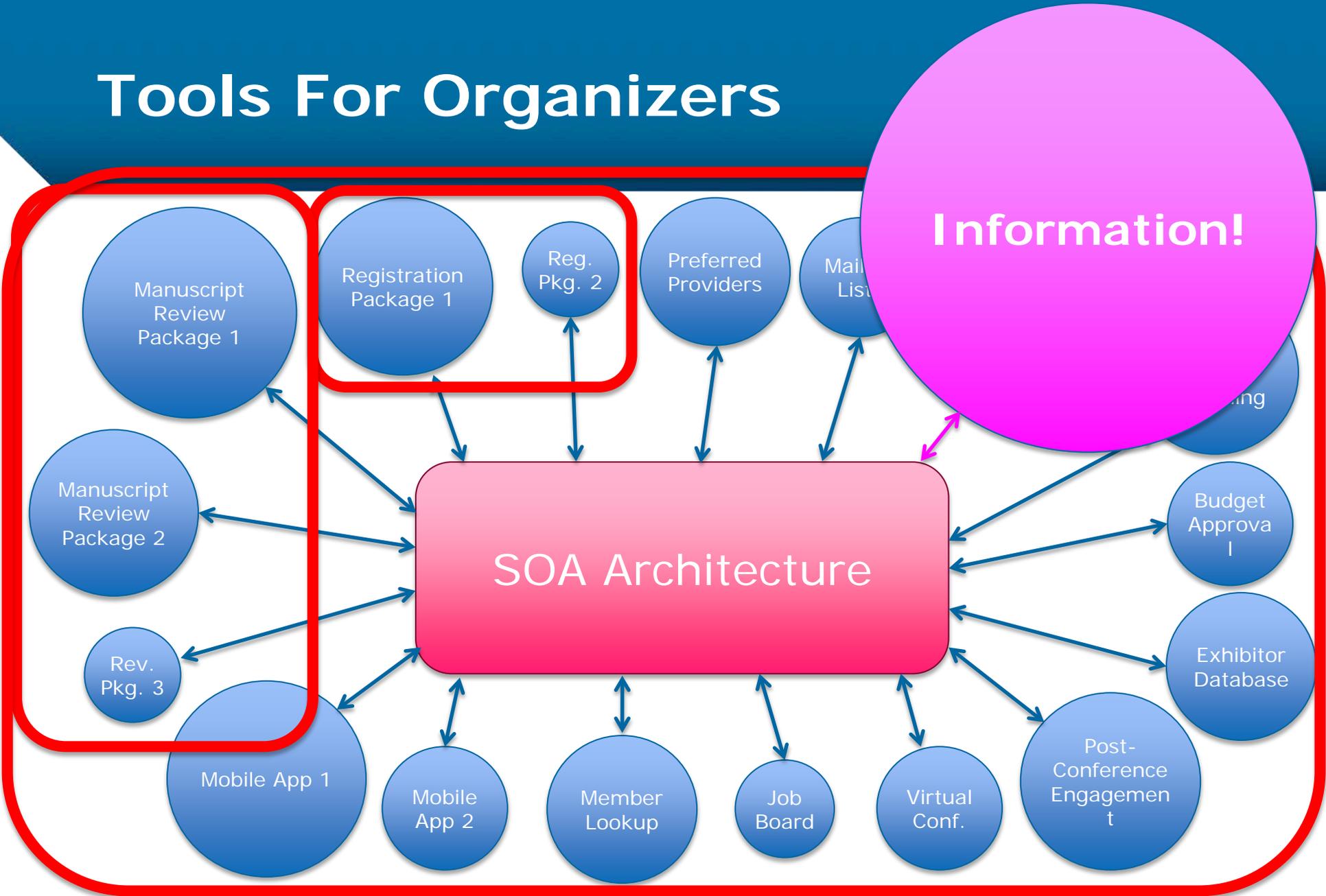
Looking Toward the Future

IEEE Conferences Committee: 2014 Priorities & Ad Hoc

- ▶ Conference Organization Tools (W. Moses- Chair)
- ▶ Conference Finance Tools (H. Flescher- Chair)
- ▶ Engaging Practitioners & Other Audiences
(F. Schindler- Chair)
- ▶ GEO Units to Better Understand their Conference
Business (C. Debono- Chair)
- ▶ Governance Document Changes
(C. Rubenstein- Chair)
- ▶ Community Access/OA- Liaison (B. Zhao, L. Tsang)

Emphasis On Providing Value to Organizers & OUs ▶ **IEEE**

Tools For Organizers



Desired Landscape: Suite of Modular, Connected Tools

Resources To Help

Conference Organizer Education Program

Blended Learning Approach



Conference Organizer Education Program

IEEE.org



The world's largest professional association for the advancement of technology

Navigation menu: About IEEE | Membership & Services | Societies & Communities | Publications & Standards | Conferences & Events | Education & Careers | Contact & Support | Sitemap

Search IEEE Follow: Share:

Home > Conferences & Events > Organizers

Conference Education Resources

- Conference Organizers Menu
 - Running an IEEE Conference
 - Quick Links
 - Getting Started with Organizing a Conference
 - Activities by Committee
 - Conference Organizer Education
 - POCO - Panel of Conference Organizers
 - Conference Organizers' Newsletter
 - Who Do You Talk to at IEEE?

What: Learn more about critical organizing, concepts, skills and resources with educational courses and webinars
Who: Various conference roles
When: Varies by area of responsibility

On this Page:

- Timeline and quick links
- Conference organizer education
- On-demand education modules
- Conference education webinar series
- View tutorials on the IEEE Conference Application
- Who do you talk to at IEEE?

Timeline and quick links

- Conference timeline and checklist (PDF, 275 KB)
- Quicklinks to forms and templates
- IEEE Conference Application
- Tools and resources for conference planning

[top of page](#)

Conference organizer education

Make your conference a success by learning about proven best practices, tools to make your processes simpler and guidance on strategic issues.

IEEE Meetings, Conferences and Events (MCE) provides conference organizers and Organizational Unit (OU) leaders several ways to gain knowledge, skills and understanding of the principles for running an IEEE sponsored conference and awareness of resources and tools provided by IEEE.

[top of page](#)

Contact Information

IEEE Meetings, Conferences and Events Customer Relationship Management is available to assist you with any questions.

[PLAY VIDEO](#)

Meet MCE!

E-mail ieee-mce@ieee.org with questions or concerns, or call:
Toll-Free: +1 855 340 4333 (US & Canada)
Toll: +1 732 562 3878 (worldwide)

Conference resources

Conferences provide an opportunity for technical professionals to share information and connect with each other.

- Attending a conference
- Attending a local event or meeting
- Publishing and presenting a paper at a conference
- Organizing a conference

- ▶ New web page dedicated to conference organizer education
- ▶ New On-Demand education modules
 - Sponsorship Overview
 - Managing Your Conference's Finances
 - Publications Overview
 - Technical Program Development

Education Program Fundamentals

On-Demand

- Web browser based
- No charge to participate
- Registration required
 - On-Demand:
Center for Leadership (CLE)
Use your IEEE (Web) account



- Delivered in English language



On-Demand Education

- ▶ Self-paced courses, focused on 'core' conference topics:
 - IEEE Conference Sponsorship ✓
 - Conference Finance ✓
 - Running a Technical Program ✓
 - Conference Publications ✓
 - Conference Application and Approval Process
 - Event Management
- ▶ Instructor led courses, 45 minutes or less
 - Knowledge checks, final quiz, given in English
 - Professional Development Hours (PDH) certificate upon completion



Conference Organizer Webinars

- ▶ Monthly series of live interactive sessions
 - Presentation from experts, followed by Question & Answer Session
 - Recorded for future playback
- ▶ Topics will range widely - *informational to instructional*
 - MCE resources, services, tools
 - Tool “How To’s”
 - Expert or Strategic Partner updates
 - Others TBD
- ▶ Delivery via WebEx
- ▶ Registration required
- ▶ Global friendly and representative times



The Workshop Suitcase

Train the Trainer

- ▶ Hosted & led by OU leadership / volunteers
- ▶ Developed by MCE Conference Education in coordination with OU leadership
 - OU goals and objectives, plus 'local' topics
 - Participant profile & available time
- ▶ MCE provides content and materials at no cost
 - Presentation materials
 - Scripts and speaker notes
 - Sample exercises
 - Pre-event speaker prep
- ▶ Typically 2 – 6 hours in length



Conference Leadership Workshop

- On-site engagement and training workshops
- Led by IEEE Conferences Committee and MCE
- Typically 1 – 2 days in length
- In-depth coverage of 'organizer basics' through OU conference management, and more...
 - *Discussion and sharing of 'best practices'*
 - *Needs identification and problem solving*
 - *Working with MCE*
- Cost shared
- Advance planning of one year suggested

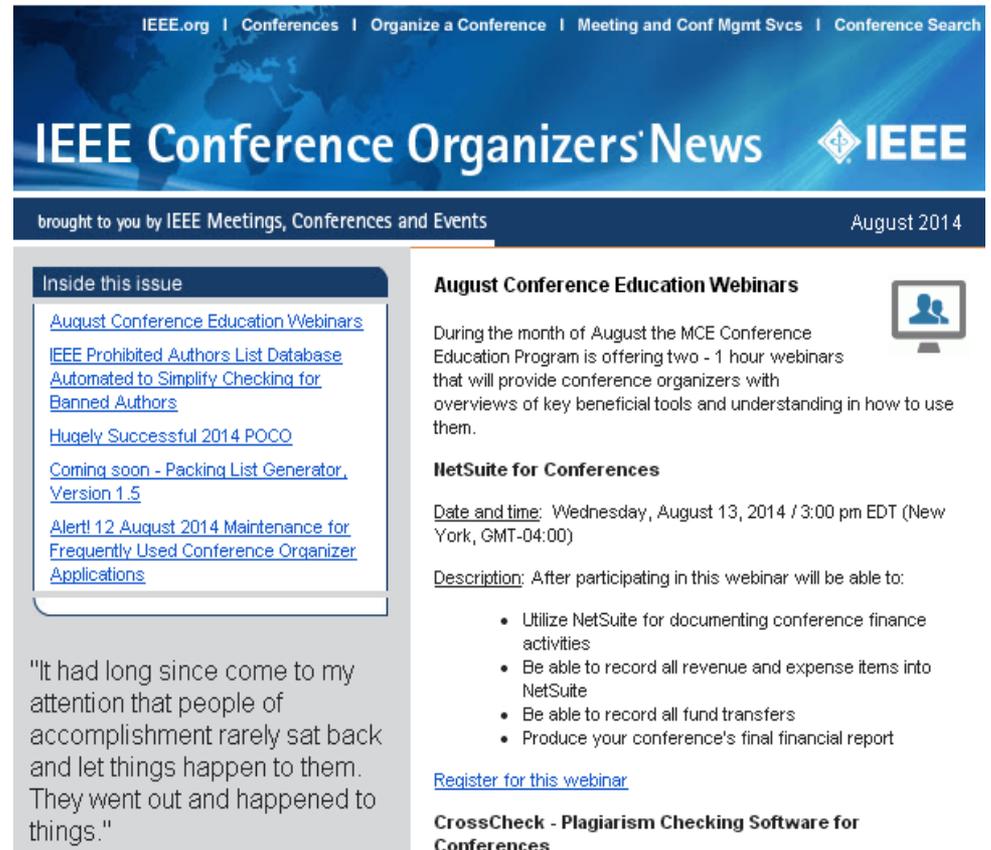


IEEE Conference Organizers' News

Sign Up !!!

- Monthly publication from IEEE Conference Services
- Sent via email to all Conference Organizers
- Our communications vehicle with you:
 - Policy changes
 - Process changes
 - Conference Organizer Profile
 - Best Practices
 - Industry news
- Subscribe today!

Send email to: ConferenceNewsletter@ieee.org



The screenshot shows the top portion of an email newsletter. At the top, a navigation bar includes links for IEEE.org, Conferences, Organize a Conference, Meeting and Conf Mgmt Svcs, and Conference Search. The main header features the title "IEEE Conference Organizers' News" with the IEEE logo on the right. Below the header, a sub-header reads "brought to you by IEEE Meetings, Conferences and Events" and "August 2014".

The content is divided into two columns. The left column, titled "Inside this issue", lists several articles with blue hyperlinks: "August Conference Education Webinars", "IEEE Prohibited Authors List Database Automated to Simplify Checking for Banned Authors", "Hugely Successful 2014 POCO", "Coming soon - Packing List Generator, Version 1.5", "Alert! 12 August 2014 Maintenance for Frequently Used Conference Organizer Applications", and a quote: "It had long since come to my attention that people of accomplishment rarely sat back and let things happen to them. They went out and happened to things."

The right column features a section titled "August Conference Education Webinars" with a small icon of a person at a computer. The text describes the MCE Conference Education Program's two one-hour webinars. Below this is a section for "NetSuite for Conferences", providing the date and time (Wednesday, August 13, 2014 / 3:00 pm EDT) and a description of the benefits. A list of bullet points details the capabilities, such as utilizing NetSuite for finance, recording revenue and expenses, recording fund transfers, and producing financial reports. A "Register for this webinar" link is provided. The bottom of the right column mentions "CrossCheck - Plagiarism Checking Software for Conferences".

POCO 2015

Panel of Conference Organizers

- POCO covers every aspect of IEEE Conferences, and is a must-attend for both the novice and veteran organizer
- Who should attend?
 - Conference OU Leadership & Active Conference Organizers
- Glasgow, Scotland
 - 16, 17, 18 July 2015
- Annual meeting of conference organizers
 - Education, conference trends, best practices & new style events



Meetings Conferences & Events (MCE)

Conference Organizers

“We are here to support you.”

- MCE has vast experience that you can leverage at *any time* while planning your conference
- MCE can consult, guide or provide services
- MCE single point of contact - please contact MCE Customer Relations Management Team at ieee-mce@ieee.org



Ways that MCE Can Assist You

- Overall guidance
- Identifying sponsors
- Finance, budgeting, insurance, contracts
- Memorandums of Understanding (MOUs)
- Publication of your proceedings
- Marketing your conference
- Site location, event management, meeting logistics
- Contract negotiations, food & beverage planning, supplier management
- Conference Organizer training and education



Please visit the
Meetings, Conferences & Events (MCE)
exhibit for more information !

Thank You!

QUESTIONS



Backup Slides

Conference Business Checklist

- IEEE Conference Information Schedule for Conference Approval
- MOU review and execution
- Contract review & execution (revenue/expense >\$25K)
- Conflict of Interest (COI) and Principles of Business Conduct (PoBC)
- Conference Proceedings Acquisition
(If you chose and the conference meets quality standards....)
 - IEEE Conference Publication Form and eCopyright (6 months prior)
 - Submission of conference content (30 days after conference)
- Conference Financials – for financially sponsored conferences
 - Bank Information and Signature Cards
 - 1099 and 1042 Schedule of Payments
 - Budget for Approval (revenue/expense >\$25K)
 - 20% Surplus Budgeted
 - Indirect Tax (VAT & GST) filings and payments
 - Pre and Post Conference Forecasts
 - Timely Closing of Conference Financials (6 months after event)
 - Final Financial Report Submitted
 - Repayment of loans
 - Audit (required if revenue or expense > \$100K

Distribution of Surplus

Proof of bank closure

Conference Supporters

Conference Supporters

- ▶ You can align your conference with “For-Profit Companies “ but **not** as a “sponsor”, they can be designated as:
 - Supporter, Patron, Partner or Contributor
 - noted separately from sponsors on all conference marketing materials including the conference web site

Benefits

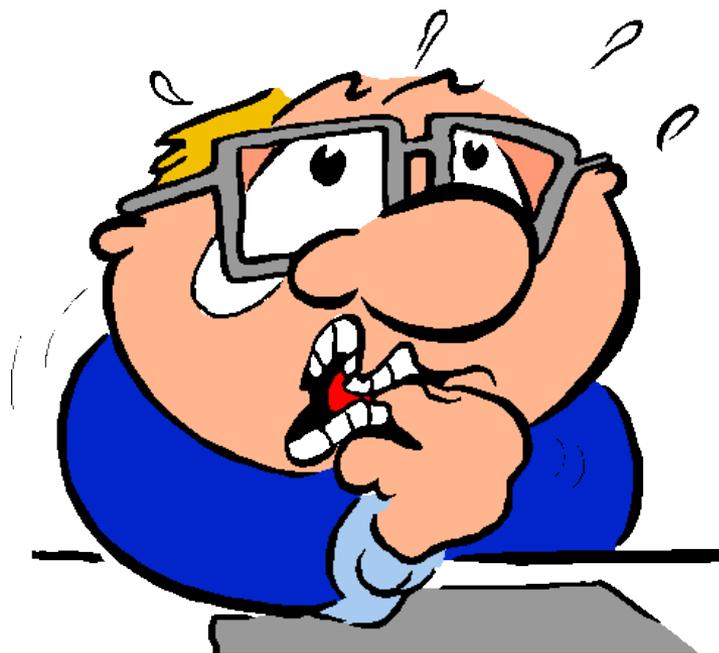
- ▶ Financial support
- ▶ Promote your conference to the “Supporter’s” constituency
- ▶ Improved attendee experience

Conference Supporters

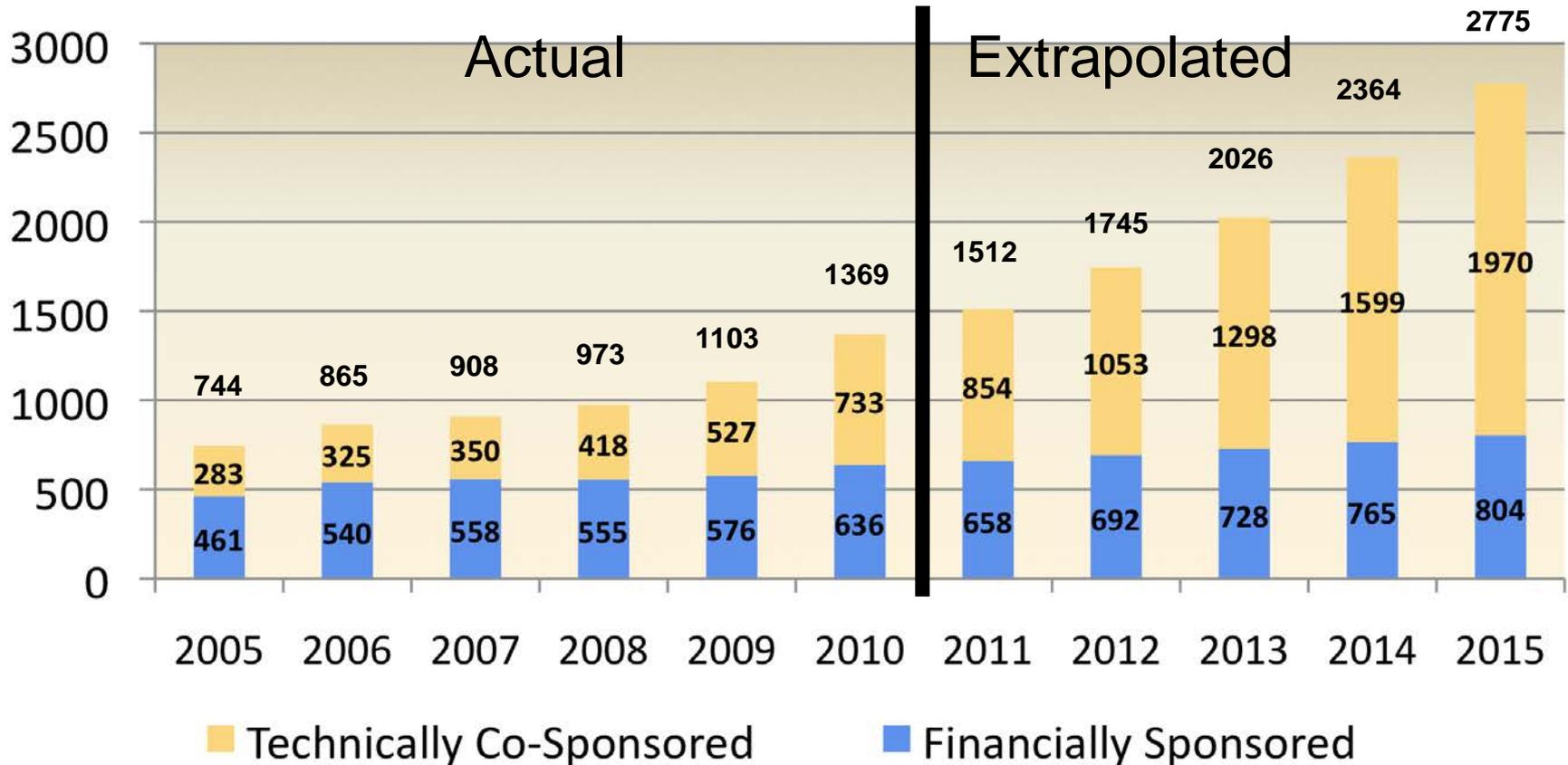
- ▶ Supporters can contribute or donate goods and services to a conference but can not be involved in the overall execution
 - Support can be in the form of a grant to assist organizers with any aspect of a conference (eg. provide a dinner)
 - Providing conference attendees trinkets or small gifts
 - An organization may donate facilities to host a conference
 - Support can be in the form of supplying a Key Note speaker

There Are Concerns...

- Growth in Technical Co-Sponsorship
- Quality Questions



Extrapolating Five Years...



Is This What We Want???

Questions About Quality...

- Conference Event
- Conference Content
- From Various Sources
 - Blogs
 - Emails
 - Customers
- Often Associated with Technically Co-Sponsored Conferences Approved by Chapters or Sub-Sections



Suggestions for the Approval Process for Conference Co-Sponsorship Involving Non-IEEE Entities

IEEE Conferences Committee

23 June 2011

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Introduction

IEEE has recently experienced a significant increase in the number of Co-Sponsored Conferences (mainly Technical Co-Sponsorship but also Financial Co-Sponsorship), and the quality of some of these conferences has been called into question. Appropriate IEEE Policies for the technical content of both the presentations (both oral and poster) and conference publications exist, so the steps being considered to limit inappropriate Co-Sponsorship relationships have focused on the Co-Sponsorship approval process. As a result, a number of IEEE OUs are now examining their approval processes. Recognizing that a "one size fits all" approach is unlikely to be appropriate for the vast diversity of conferences and IEEE OUs involved, the Conferences Committee has identified four Key Features that it feels will yield Co-Sponsorship approval processes that ensure that the requisite quality goals will be achieved. These Key Features are offered not as formal policies or requirements, but as a suggested framework for those who are reviewing their approval processes.

Definitions (used strictly for the purpose of these suggested guidelines)

External Partner	A non-IEEE organization that is involved in sponsoring the conference. A conference can have more than one External Partner, and each External Partner will have some financial responsibility for the conference and sign an MOU with IEEE regarding Co-Sponsorship of the conference.
Supporting Sub-OU	A group of IEEE members that actively participates in the technical program of the conference. These members generally belong to the same Sponsoring OU and officially represent the Sponsoring OU in their dealings with the conference.
Sponsoring OU	The IEEE OU (e.g., Society, Board, Region, Section, Chapter) that the Supporting Sub-OU belongs to. A conference can have more than one Supporting OU.
Approval Body	A formally recognized group of IEEE members that approves the Co-Sponsorship.

To aid with understanding the concepts behind these definitions, the following is a "typical" Co-Sponsorship approval that highlights the roles of each of these groups. People representing an "External Partner" approach a "Sponsoring OU," asking the "Sponsoring OU" to Co-Sponsor a conference. The "Sponsoring OU" appoints a small group of people (the "Supporting Sub-OU") to officially represent the "Sponsoring OU" in its interactions with the "External OU." The "Supporting Sub-OU" works with the "External Partner" and determines a plan for how the "Sponsoring OU" and the "External Partner" will jointly put on the conference. Once the plan is acceptable to the "Sponsoring OU," the "Supporting Sub-OU" presents this plan (which includes a proposed MOU between the "Sponsoring OU" and the "External Partner" that delineates this plan) to the "Approval Body." If the "Approval Body" gives its approval, the MOU is transmitted to the "Sponsoring OU," the "External Partner," and IEEE Conference Services for signature by the authorized people from each of these bodies. Co-Sponsorship is formally granted when all these parties sign the MOU and it is transmitted to IEEE Conference Services for archiving.

Suggestions for the Approval Process for Conference Co-Sponsorship Involving Non-IEEE Entities

IEEE Conferences Committee

23 June 2011

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Key Features of a Successful Process for Ensuring Quality Co-Sponsorships for IEEE:

1. Before Co-Sponsorship is formally approved, the "Supporting Sub-OU" should investigate the conference and the "External Partner" to evaluate whether the conference will meet the requirements of a successful IEEE conference, many of which are stated in IEEE policy. Specifically, the investigation must conclude the following:
 - a) IEEE assets are being protected. These include the IEEE brand, funds, and intellectual property.
 - b) Each "External Partner" is a Not For Profit Organization, except under certain limited conditions (see IEEE Policy 10.1.2).
 - c) The topic area is appropriate for IEEE and is within the IEEE technical scope. If the OU is a Technical Activities Board entity, the technical scope must reflect that of the "Sponsoring OU" (see IEEE Policy 10.1.3).
 - d) Each "Supporting Sub-OU" has "direct and substantial involvement in the Technical Program" and is actively involved in the conference rather than being a passive bystander (see IEEE Policy 10.1.2).
 - e) If the conference is included in the Conference Publication Program (CPP) and technical papers are expected to be deposited in Xplore, the conference has a peer review process that follows IEEE publication guidelines. In general, this implies that each manuscript be reviewed by multiple anonymous reviewers that are knowledgeable in the subject area. Similar standards are also expected for the poster or oral presentations to be given at the conference (PSPB Operations Manual Section 8.2.2.B).
 - f) Since being able to use the IEEE name and to have manuscripts included in CPP is a significant benefit / value to the "External Partner," the IEEE should receive a benefit of significant value in return.
 - g) Open presentation and critical discussion are important aspects of conferences. Thus, the conference venue should be verifiable and appropriate to the Technical Program, and there should be adequate time to review, accept, and accommodate presentation of the accepted papers.
2. After Co-Sponsorship is approved by the Approval Body, the "Supporting Sub-OU" should continue its involvement with the conference, and in particular, verify that the requirements of a successful IEEE conference stated in 1) are being followed. Of particular importance is to ensure that the conference paper management process is transparent to IEEE, and designated members of the "Supporting Sub-OU" should participate in the review process and have access to the complete review records.
3. Independence in the Co-Sponsorship approval process is necessary. Specifically, the individual IEEE members in the "Supporting Sub-OU" should not have a controlling influence on the "Approval Body." The "Supporting Sub-OU" should make the case for Co-Sponsorship to the "Approval Body," who will then evaluate the merits of engaging in Co-Sponsorship, determine whether the requirements described in 1) and 2) are likely to be met, and ultimately decide whether to recommend or approve Co-Sponsorship.

Suggestions for the Approval Process for Conference Co-Sponsorship Involving Non-IEEE Entities

IEEE Conferences Committee

23 June 2011

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4. An effective hierarchical approval and reporting structure is necessary. There must be a single, well-defined "Approval Body" for each "Sponsoring OU" that formally recommends or approves Co-Sponsorship. In addition, there should be well-defined entities (probably either the "Approval Body" or the "Sponsoring OU") that receive periodic reports from the conference and/or the "Supporting Sub-OU" (to make sure that all parties fulfill their obligations) and have responsibilities involving issue reporting and enforcement. Note that exact format and structure can be determined by each OU (subject to constraints placed on it by its parent OU), and can vary from OU to OU.

Example:

For technical IEEE conferences, one example of a process that contains these four Key Features can be found at <http://ewh.ieee.org/soc/nps/cosponsorship.html>.

What Makes a Good Conference?

Emily Sopensky

IEEE-USA Representative, IEEE Conferences Committee

Parviz Famouri

MGA Representative, IEEE Conferences Committee

What Makes a Good Conference?

- It Depends.

- What are your goals?
 - Make money?
 - Meet the expectations of your constituency?
 - Gain new membership?
 - Share latest advancements?
 - All of the above?

Key elements

- It all starts with your IEEE OU
 - S/C, Region, Section, etc.
- The key is the Organizing Committee
- For a technical conference, the technical program committee is the key ingredient

The Technical Program Committee (TPC)

- Chair recognized and motivated
- Committee comprised of experts in the field(s) of interest of the conference
- Enough experts per interest to have at least two reviewers per submission.

What Makes a Good Conference?

- Keeping attendees abreast of the latest technology and explore ideas, experience and views of authors and panelists from government, industry and academia.
- Holding seminars/workshops to teach from recognized experts offering insights into a wide range of relevant topics.
- Exhibiting from appropriate field from industry and government.

What Makes a Good Conference?

(cont'd)

- Hearing high level views and interact with keynote speakers and learning from recognized experts offering insights into a wide range of topics.
- Organizing socials in special places and/or field trips and tours.
- Holding the conference around the same calendar time.
- Hold the conference in pleasant places where people want to travel to.
- Registration discounts for IEEE members

What Makes a Good Conference? (Summary)

- Intermingling among participants and scholars
- Share the latest and greatest in the technical field
- Connect with peers and network
- As a participant: My registration fee was well worth it
- As an organizer: This was a significant undertaking and worth it.

Conference Sponsorship and Managing Sponsorship

Hulya Kirkici

TAB Representative, IEEE Conferences Committee

Conference Sponsorship Criteria

- IEEE and its O/Us annually sponsors a wide range of geographically diverse technical conferences, symposiums and workshops to facilitate identification, creation, capture and exchange of scientific and technological knowledge that benefits the IEEE members, profession, and humanity.
- **Available sponsorship types are:**
 - **Sponsorship:** accepting all financial, technical, and legal liability.
 - **Co-sponsorship:** sharing the financial and legal liabilities according to the percentage of sponsorship.
 - **Technical co-sponsorship:** accepting only the technical liability and is usually requested by a non-IEEE entity and requires an approval of an IEEE O/U.

An Effective Conference Co-Sponsorship Approval Process

- Before approval, IEEE volunteers should investigate conference to ensure that IEEE policies will be followed.
- **After approval, volunteers should maintain involvement & verify that policies are actually being followed.**
- **Arms-length approval process — the volunteers who are involved with the conference should not control the approvers.**
- Effective hierarchy necessary—well-defined structure for receiving periodic reports and reporting problems.

Institutional approval level for co-sponsorship of “external” conferences

- **Society and Councils:** Conference Organizers complete and sign an MoU after S/C’s AdCom (Board, ExCom, etc.,) agrees and approves the requested sponsorship.
 - S/Cs have direct and substantial involvement in the development of the technical program of the conference.
 - Peer-review of the Proceedings papers is mandatory (level of it is defined by each S/C in MoU)
- **Subsections, Chapters, Geographic Councils, Affinity Groups and Student Organizations** must obtain approval by the **Region or Section** to which that organizational unit belongs.
 - **Criteria for organizational unit approval includes:** sound financial planning, benefit to the membership, absence of conflict with other conferences, assurance of technical content quality, and protection of the IEEE brand.

Managing Sponsorship: Recommendations

- **S/C must have direct and substantial involvement** in the development of in the conference organization (financial and technical) before and after the conference, such as serving on the governing body or a chair position
- **Have at least one S/C person in a position to help set the conference policy** for most aspects of the technical program including accepting submissions; to have first-hand knowledge of how this policy is implemented; and to keep S/C informed about the development and implementations of the technical program.
- **Facilitate the dissemination of technical information** substantial interest to the S/C community.
- The conference organizers, in cooperation with S/C liaison, present a **timely evaluation of the conference** to the S/C's AdCom.

The Soul of the Conference: Effective Technical Program Development

Bin Zhao

TAB Representative, IEEE Conferences Committee

Conference Technical Program: Scope and Intent

- Technical program of a conference is the key vehicle and **the most critical means** to realize the conference objectives
 - Information exchange
 - Bring people together
 - Publication, etc

- Technical program should focus on a **contemporary technical** subject
 - Cover one discipline or of multi-disciplinary nature
 - Must be **informative, inspirational, and involving**

- Technical program should help facilitate
 - **Share, learn, and network**

- Technical content and scope should be designed for some well defined and clearly targeted **attendees**
 - Who are they?
 - What do they need?
 - How to best serve the needs?

Conference Technical Program: Content Format

- Plenary speeches
 - By **prominent** experts and technical leaders
 - **Overview** current status, challenges, and future perspectives
- Oral presentations
 - Consist of both **invited** and **contributed** presentations
 - Focus on most **updated and leading** R&D results and achievements
- Poster sessions
 - **More** technical content which cannot be covered by oral presentations
 - Opportunities for in-depth technical discussions and **interactions**
- Panel sessions
 - **Lively** discussions and brainstorming among panelists and other participants
 - On timely important, non-conclusive and sometimes **controversial** topics
- Tutorials
 - By **leading experts** in their respective areas of engineering and technology
 - Material suitable for **newcomers** as well as **experts** in the field
- Technical tours
 - History, status and advancement of engineering at specific **locations**

Technical Program Committee: Key Element for Success

- Technical Program Committee (TPC) can be responsible for every aspect of the Technical Program
 - Plan and develop **content topics and objectives**
 - Develop and enhance **Call-for-Papers**
 - Suggestions on topics and speakers for **plenary speeches**
 - Identify topics for **panels**, find panel organizers/moderators and panelists
 - Identify topics for **tutorials** and find lecturers
 - Solicit **contributed** papers and promote conference
 - Secure **invited** speakers
 - **Review and select** abstracts or papers
 - Assign selected papers and organize **technical sessions**
 - Help to **execute the conference**, serve as session chairs or other roles

- Requirements on Technical Program Committee and members
 - **Knowledgeable** (experts) in the technical fields related to the conference
 - Able to **devote energy/time** to the conference and meet various timelines
 - **Working together** – take, share responsibility and accountability

Effective Technical Program Development – Team

- Form A Proficient Technical Program Committee
 - Define **preliminary** technical **scope and objectives** of the conference
 - Identify the **main responsibilities** of the committee
 - Chair(s)
 - Members
 - and **others**
 - **Build** the team of technical experts **with enthusiasm**
 - **Refine** the technical **scope and objectives**
 - TPC
 - **Restructure** TPC per need
 - Subcommittees
 - Working groups
 - **Assign** clear responsibilities and ownership
 - Need a **Core Team** to drive different tasks and meet schedule
 - Critical mass
 - Accountability
 - Contingency plan

Effective Technical Program Development – Schedule

- Schedule Planning for Major Tasks
 - Committee meeting for Technical Program **preparation**
 - teleconference
 - Develop and send out **Call-for-Papers** (mailing / email)
 - Paper/abstract **submission deadline**
 - Schedule for paper **review and ranking**
 - Committee paper **review meeting** and final paper selection
 - **Notification** to authors of accepted/rejected papers
 - **Final manuscripts** for publication
 - Timelines for organization of other key elements
 - **Plenary, tutorial, and panel** sessions
 - Construct Technical Program
 - Assemble **technical sessions**
 - Arrange conference **agenda/schedule**
 - **Advance technical program**
 - **Pre-conference TPC meeting**

The Paper Review Process: Challenges and Opportunities

Michael Lightner

**PSPB Representative, IEEE Conferences Committee
2006 IEEE President**

Outline

- ▣ Why to Review
- ▣ What to Review
- ▣ How to Review
- ▣ Ongoing Challenges

Why to Review

- Determine **suitability** of material for conference
- Determine **quality** of suitable material
- Provide a potential filter for **plagiarism**
- Build up the **reputation** of the conference
- Organize material into sessions
- Find people to chair sessions

What to Review

- All material that will go into Xplore should be reviewed
- Typically does not include
 - Panel Sessions
 - Invited talks – unless there is a paper
 - Keynote presentations – unless there is a paper
 - Poster sessions not associated with papers in the proceedings

How to Review

- Authors submit full paper for review
 - Should meet IEEE standards for references
 - Best if use IEEE template
 - Best if done electronically with communication trail with author(s)
 - There should be **one** corresponding author/paper
- Need to identify experts to review the papers
- Technical Program Chair organizes a Technical Program Committee
 - Based on the conference topical areas

How to Review

- First step, **suitability** – determine whether paper is in the conference area of interest and meets any guidelines for length, format, etc
 - Often done by the TPC Chair, sometimes with small committee
- Second step – Assign to one of the major areas of the conference
 - Often associated with an individual or group on the Technical Program Committee

How to Review

- Third step, **quality** – many variations
 - Member of TPC takes the lead of an area and is assigned a group of papers
 - TPC has a number of members in this area
 - Or Area lead has list of reviewers
 - Papers are reviewed
 - Must have review guidelines
 - Comments from reviewers must be useful in judging paper
 - Accept – very high quality
 - Accept – high quality
 - Marginal Accept – quality OK, but not very interesting
 - Reject

How to Review

- All reviews should be done before any meeting, either face-to-face or electronic
- A spreadsheet with the results of all reviews should be available to the TPC members in each specific area
 - Reviews should be anonymous – authors not known to reviewers
- Now the decision on which papers to accept needs to be made
 - Suggestion – triage based on reviews
 - Absolutely accept
 - Maybe accept
 - Reject

How to Review

- KEY POINT
- MUST HAVE MULTIPLE REVIEWERS
 - Best practice is three, but MUST be more than one
- THIS IS CRITICAL
- The material submitted to Xplore must be reviewed

How to Review

- Spend time in the TPC meeting discussing the Maybe Accept
 - Try to understand the reviewers concerns, does the paper have fatal flaws
 - Look at whether the paper would make a nice contribution to a session – help round out a session
 - How many papers are needed
 - If too many papers have been submitted for the number of available slots some “Maybe” papers will be rejected

How to Review

- It is possible to require that authors make certain changes to papers before they are acceptable
- Communicate to authors with results of review process, any next steps, requirements for presentation at the conference, etc.

Ongoing Challenges in Reviews

- No matter what conference there are always two challenges
 - Getting enough high quality papers by the submission deadline
 - Finding enough experts to give reviews by the deadline
 - It is important that all reviews are completed before any face-to-face meeting of the TPC
- Building up conference quality and reputation will help with both of these

How to Send Everybody Home Happy: Things to do During and After the Conference

Okyay Kaynak

MGA Representative, IEEE Conferences Committee

Sending them home happy – what does this mean?

- We hope the attendees of IEEE Conferences will:
 - Attend the future editions of this conference and other IEEE ones
 - If they are not a member, join IEEE
 - Become involved and engaged in other IEEE activities
 - Be an advocate for IEEE and IEEE Conferences within their own communities

Before the conference

- Provide opportunities for messaging and networking
 - Use social networking sites – create facebook, twitter, LinkedIn pages for the conference attendees for use before, during and after.
 - The above could be used for as simple means as sharing taxis from the airport to sharing hotel rooms. Facilitate this!

During the conference

- Provide opportunities for networking
 - Set aside time for attendees to meet and get to know each other, e.g. include lunch in the registration fee (even if it is a simple lunch box). Birds of a feather (BoF) lunches?
 - Help attendees find others with the same interests
 - Use social networking sites – create facebook, twitter, LinkedIn pages for the conference attendees before and after.
 - Assign a student to take photos and make them available for immediate downloading.

During the conference (contd.)

- Try to create a family atmosphere, e.g.
 - Identify the youngest participant and publicly acknowledge by a certificate (a child)
 - During registration, enquire if the birthday of someone happens to be during the conference (the odds are that there will be someone).
 -

Before they leave

- Encourage attendees to provide conference feedback by completing comment cards and/or surveys (submit a survey card, pick up a souvenir or enter a drawing??)
- Recognize and thank all that contributed to the success of the conference including presenters, local arrangements committee, attendees and etc.
- Send attendees home with something that will remind them of the experience
- Sign them up as volunteers for the next year

After they leave

- A Conference should live beyond the 3 day event – keep the networking sides alive
- Make photos from the conference available for downloading.
- Most importantly, send every participant a “thank you” message!



Where to find this Presentation:

This and all Sections Congress 2011 presentations will be available for view at the IEEE Center for Leadership Excellence website.

Visit us for this and other Volunteer Leadership training specifically designed to train volunteers like you!

Let us know what you think:

<http://www.ieee.org/go/cle>

Costs Associated with TCS

Technical Co-Sponsorship: Common Misconception

- Technically Co-Sponsored (TCS) conferences do not cost IEEE anything
- TCS conferences only need volunteer time, for which there is no cost to IEEE

Reality:

- On average, in 2013 each TCS conference cost IEEE \$5400
- The number of TCS conferences has grown 2.5x since 2005 (currently ~750 / year)

Where Do These Costs Come From?

■ Publications (\$838)

- Acquiring proceedings, preparing proceedings, PDF compliance, assigning DOI, uploading into IEEE Xplore[®], indexing,...

■ Software (\$1,694)

- IEEE Conferences web pages, including basic information, conference initiation and approval, conference search, publications acquisition and processing,...

■ Memorandum of Understanding (\$581)

- Negotiating MOUs with partner conferences, verifying non-profit status of partner conferences

■ Quality (\$806)

- Checking for plagiarism, appropriate scope, and English quality

■ Infrastructure (\$1,452)

- Organizer training, customer inquiries, departmental administration, legal, marketing, and other overheads...

Common Misconception

- Each TCS paper increases IEEE revenue from IEEE Xplore[®] sales

Reality:

- ▶ Most IEEE Xplore[®] income comes from packages that have unlimited downloads
 - ▶ Subscribers measure value by the cost per pdf (not number of available papers)
- ⇒ Revenue is ~independent of the number of papers in IEEE Xplore[®]

2011 slides for TCS

IEEE BoD Motion Regarding Sponsorship for MGA Conferences

- Board approved motion in May 2011
 - Sections or Regions must approve sponsorship of conferences in certain cases
 - Applies to both technically co-sponsored and financially co-sponsored conferences
 - Applies only when an MGA organizational unit partners with a non-IEEE entity
- MGA has developed a new conference sponsorship process to support the Board approved motion
- Will be implemented 1 January 2012

Not All OUs Should Be Able to Allow Use of the IEEE Brand

MGA Approval Requirements

- Section level approval is required
 - When certain MGA OUs (Subsections, Chapters, Geographic Councils, Affinity Groups, Student Branches) co-sponsor a conference with an outside entity
 - Applies to both financial co-sponsorships and technical co-sponsorships
- Regional approval may be required in some cases
 - e.g., conflict of interest at Section level

Sponsorship Scenario I

- IEEE PES Chapter and IEEE ComSoc Chapter wish to co-sponsor a conference
- PES Chapter is 100% financial sponsor
- ComSoc Chapter is technical co-sponsor

- Approval level required:
 - PES Chapter enters into MOU with ComSoc Chapter. No additional approvals required.

Sponsorship Scenario II

- IEEE PES Chapter wishes to co-sponsor a conference with a local university
- Local university is 100% financial sponsor
- PES Chapter is technical co-sponsor

- Approval level required:
 - PES Chapter must seek approval of their IEEE Section before entering into MOU with the university

Sponsorship Scenario III

- IEEE PES Chapter wishes to co-sponsor a conference with a local university
- Local University is $X\%$ financial sponsor
- PES Chapter is $(100-X)\%$ financial sponsor

- Approval level required:
 - PES Chapter must seek approval of their IEEE Section before entering MOU with the university

Back up Brand

Appropriate Brands for Partnering with IEEE



Massachusetts
Institute of
Technology



VDE

Google



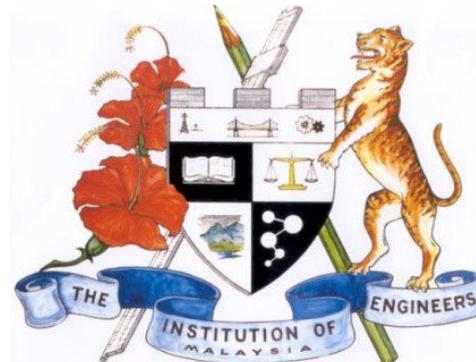
清華大學

Tsinghua University

University of Berkley

Alcatel·Lucent

Bell Labs



The Institution of Engineers, Malaysia



When to Partner with Organizations

- Sponsors should be engaged in the early stages of planning your conference.
- Your Organizational Unit should engage sponsors after you have determined:
 - Conference scope
 - Event scale (global, regional, local)
 - Volunteers availability to participate and execute the conference
 - Budget draft is constructed
- The budget draft will help you determine the need for co-sponsors and/or conference supporters.

QUESTIONS

