10.0 CONFERENCES

The objective of a conference is to provide a forum for the communication of advancements in the field of the conference, both through formal paper presentations and informal discussions.

The Regional Activities Board encourages the formation of new conferences and the participation of geographic organizational units in existing conferences. RAB and its geographic organizational units may organize and sponsor meetings, seminars, symposia, conferences, and other educational and scientific programs to benefit the public on matters related to the interests of the IEEE membership.

Conference organizers are requested to refer to the Section 10 of the IEEE Policy Manual and the IEEE Meetings Manual for additional details regarding the organization of IEEE Conferences.

10.1 PURPOSE OF CONDUCTING A CONFERENCE

As stated in the IEEE Policy Manual Section 10.1.1: "The prime objective of IEEE conferences is to provide IEEE members, other individuals and organizations with information and exhibits to assist in the advancement of electrical and electronics engineering and the related arts and sciences."

To accomplish this objective, the Institute shall:

- Encourage Conference Committees to develop programs suitable to the needs of attendees, speakers and other participants for which each conference is intended.
- Encourage all IEEE organizational units to conduct conferences, which should benefit the interests of IEEE membership and the greater technical community.
- Encourage cooperation between organizational units to promote, plan, organize and schedule conferences and exhibitions in a timely fashion within the stated field of interest

10.2 TRANSNATIONAL PARTICIPATION

IEEE is committed to enhancing transnational participation in IEEE meetings. Transnational participation in IEEE meetings can be enhanced by increasing efforts to attract Region 7-10 participants to Regions 1-6 meetings and by expanding the number of conferences and other meetings held in Regions 7-10.

10.3 TYPES OF CONFERENCES

As authorized in the IEEE Bylaws, an IEEE organizational unit – either by itself, jointly with other IEEE organizational units, and/or jointly with non-IEEE organizational units – may plan a conference for which registration fees will be charged.

The term "conferences" are defined as technical or professional meetings that have a budgeted income/expense of greater that $25K USD. Conferences can be Symposia, Workshops, Short courses, Expositions, Conventions, and/or Tutorials. Both members and non-members of the IEEE generally attend conferences. Attendees generally pay to attend. Conferences are typically self-supporting and frequently generate a surplus. Conferences are sponsored by one or more IEEE organizational units and/or other not-for-profit organizations. (policy 10.1 for details).

A. IEEE Conference. A conference is a major meeting which covers a specialized (vertical) or broad range (horizontal) of set topics. Conferences typically accommodate more than 250 attendees and are of several days in duration.

B. Symposium. Similar to a conference, a symposium is a meeting, which covers a more specialized range of topics. It typically has less than 250 attendees and runs one or more days. Its program is handled much as in the same manner as an IEEE conference.

C. Workshop. A workshop is a small meeting where most attendees are expected to actively participate in the interchange. The number of attendees usually does not exceed 100 registrants.

D. Tutorial - A tutorial is taught by one or more instructors who are recognized experts in a specific field. The purpose of the tutorial is to educate a relatively small group of attendees on a selected topic. Research topics are generally excluded from tutorials.

10.4 CONFERENCE BUDGETS

The detailed conference budget should provide all needed financial information, indicate clearly the extent of participation of each organizational unit, and be consistent with analysis of the attendance and financial results of any preceding conference on the same subject. Conference Chairs are advised to submit budgets to the sponsoring organizational unit as far in advance as is feasible, but at least one year prior to the conference.

If a budget cannot be submitted at least one year prior to the proposed date of the conference, the IEEE Executive Committee or designee must be notified of the circumstances through IEEE Conference Services.

All requests for budget approval, which require IEEE Executive Committee or designee approval, must be accompanied by written approval of the IEEE sponsoring organizational units. In addition the request should state whether cross endorsement has been sought, (Policy 10.1.4).

All conference budgets submitted for approval are expected to break even or run at a surplus. However, if an organizational unit organizes a series of related conference/activities, they may view the series as a group and submit a single budget for the group. The entire group of conferences should meet the break even/surplus requirement stated above. Under rare circumstances and with sufficient reasons, an organizational unit may elect to budget a particular conference on a deficit basis. Such a deficit budget may be approved if it is properly related to the total organizational unit fiscal picture and the rationale for the deficit is provided.

During the course of the conference planning, if substantial financial changes are made to the originally submitted budgets, a revised budget should be resubmitted for further approvals to the appropriate organizational unit. Failure to submit a budget or failure to identify any circumstances affecting the advisability of proceeding with a conference may result in action from the IEEE Executive Committee or designee. The IEEE Executive Committee or designee reserves its right to modify the terms of or in extraordinary cases to cancel approval of the conference.

Budgets for ancillary conferences, Short Courses or Expositions held either directly following or preceding a conference could be included within the main conference budget.

However, income and expenses from these activities should be clearly identified.

The use of conference funds for the purpose of hosting visitors requiring intercontinental travel is a legitimate conference expense if approved by the conference committee. Such support, including travel expenses, should be included in the budget. When such a budget item is requested, the chair of the conference should establish a committee specifically charged with the responsibility of acting as host to these visitors.

Audit fees shall be incorporated in the conference budgets and displayed as a separate line item.

10.5 CONFERENCE INVOLVEMENT

As stated in the IEEE Policy Manual Section 10.1.2:

Sponsorship relates to the responsibilities and accountabilities of an organizational unit with respect to financial, technical, publicity, and administrative aspects of a conference. For a conference to be

considered an IEEE conference, it must be sponsored by at least one IEEE organizational unit. If multiple organizational units are sponsoring a conference, at least one of the organizational units must be an IEEE organizational unit.

An IEEE organizational unit is defined in the IEEE Bylaw I-109 as a subset of the entire IEEE membership that has been formed to carry out particular educational, geographic, professional, technical, or other appropriate activities of interest and service to those who are members of that organizational unit as permitted by law. Each IEEE organizational unit shall be an integral part of the IEEE and not a separate organization. Therefore, IEEE organizational units include all Boards, Societies, Regions, Sections, Chapters, Councils and committees.

IEEE organizational units engaged in conference sponsorship may not enter into any type of sponsorship arrangement with a "For Profit" organization. Noncompliance with the provisions of this approval policy may result in denial of approvals for subsequent events. "For Profit" organizations can, however, provide donations, as indicated in Policy 10.1.23.

The four types of conference sponsorship available to IEEE organizational units are described below:

A. Sole Sponsorship

Sole sponsorship indicates full and sole organizational unit involvement in a conference. If an IEEE organizational unit agrees to sponsor a conference, they accept complete responsibility for the technical, financial, publicity and administrative aspects of the conference. As a result of sole sponsorship, the organizational unit

- will approve the conference as indicated in Policy 10.1.4.
- will receive the surplus or be liable for any deficit resulting from a conference, (Policy 10.1.9).
- will be responsible for assuring the timely resolution of any legal issues.
- will be responsible for issuing any loans that the conference might need and assuring subsequent repayment, (Policy 10.1.7).
- will be responsible for proper usage of the IEEE name (Policy 10.1.6) and the IEEE logo, (Policy 10.1.7).
- Conferences where the IEEE has sole sponsorship, the rights to the conference name, slogan, copyright for publications, and/or logo are owned by IEEE and not conference committees.

B. Co-Sponsorship

Co-Sponsorship indicates a shared involvement among several organizational units, one of which is an IEEE organizational unit. Other co-sponsoring organizational units could be IEEE organizational units or other " Not-for-Profit" non-IEEE organizational units.

Co-Sponsorship indicates a shared and significant involvement in the technical, financial, publicity and administrative areas of the conference. The relationship between sponsoring organizational units should be explicitly defined in terms of a Memorandum of Understanding, see Policy 10.1.5.

As a result of co-sponsorship, the organizational unit

- will approve the conference as indicated in Policy 10.1.4.
- will receive a portion of the surplus or be liable for a portion of the deficit resulting from a conference, (Policy 10.1.9).
- will be responsible for assuring the timely resolution of any legal issues.
- can be responsible for issuing any loans that the conference might need and assuring subsequent repayment, (Policy 10.1.7)
- will be responsible for proper usage of the IEEE name (Policy 10.1.6) and the IEEE logo (Policy 10.1.7)

C. Technical Co-Sponsorship

Technical Co-Sponsorship indicates direct and substantial involvement by the organizational unit solely in the organization of the technical program. The IEEE organizational unit has no financial involvement in the conference. The organizational unit that has financial sponsorship of the conference must be explicitly identified in the supporting paperwork for technical sponsorship to be granted. The IEEE organizational unit should be involved in encouraging members to submit papers and attend the conference. The IEEE organizational unit may assist in publicity through the availability of the appropriate IEEE organizational unit mailing lists. It is recommended that the relationship between sponsoring organizational units should also be explicitly defined in terms of a Memorandum of Understanding, (Policy 10.1.5). The IEEE name may not be used in the conference title, (Policy 10.1.16), but, the IEEE logo may be used in conference publications and promotional materials, (Policy 10.1.17).

D. Cooperative Sponsorship

An organizational unit may cooperate in a conference. This type of involvement is very limited. The IEEE organizational unit has no financial involvement, no substantive technical involvement, and no administrative involvement in the conference. The organizational unit can assist in publicity for the conference by providing the appropriate IEEE organizational unit mailing lists and possible advertisement in publications. The IEEE name and logo cannot be used in any form. (Policy 10.1.16 & 10.1.17).

10.6 ORGANIZING A CONFERENCE

In order to conduct a successful conference a number of working committees should be organized under the direction of the Conference Committee

- Program Committee
- Publications Committee
- Publicity and Public Relations Committee
- Finance Committee
- Audit Committee (as required)
- Exhibits Committee (when needed)
- Local Arrangements Committee
- Registration Committee
- Awards Committee (if appropriate)

Specific details concerning the organizing, planning and scheduling of a Conference are contained in the IEEE Meetings Organization Manual.

10.7 CONFERENCE FILING INFORMATION

As soon as possible – but no later than 18 months before the conference – an IEEE Conference Information Schedule form should be submitted to IEEE Conference Services. These forms are supplied by IEEE Conference Services on request. Early submission of conference information provides for appropriate listing and publication in the IEEE Technical Activities Guide (TAG), which gives early publicity to the professional community. Note that filing for insurance should also be done at this time. All contracts entered into by the Conference committee are to be forwarded to the appropriate IEEE organizational units.

10.8 INSURANCE FORMS

All IEEE meetings should be insured against liability. It is mandatory that the Request for Conference Insurance form be submitted together with a listing of the Conference Committee members to obtain this coverage. It is strongly recommended that these forms be submitted with the IEEE Conference Information Schedule form. Any questions on insurance may be referred to IEEE Conference Services.

10.9 COOPERATION OF TECHNICAL/PROFESSIONAL & GEOGRAPHIC ORGANIZATIONAL UNITS IN CONFERENCES

Successful conferences are based on the strong cooperation of both technical/ professional and geographic organizational units. Such cooperation is crucial to the success of all IEEE conferences. If both technical/professional and geographic organizational units are involved in the organization of the conferences as early as possible – preferably before any arrangements have been made – it may be able to ensure that activities are run smoothly and that volunteers are available to assist in running the conferences. Such involvement should precede the selection of the conference location.

10.10 MEMORANDUM OF UNDERSTANDING

As stated in the IEEE Policy Manual Section 10.1.5:

A memorandum of understanding, (MOU), sets forth the relationship and obligations of the involved parties. An MOU is required when two or more organizational units agree to co-sponsor or technically co-sponsor a conference. These organizational units may be all IEEE organizational units or IEEE and non-IEEE organizational units as indicated in Policy 10.1.2.

As a minimum, an MOU should describe the following areas:

- Financial sponsorship of each organizational unit. These arrangements are needed for both liability and surplus distribution purposes.
- Ownership of the Intellectual Property associated with a conference. This includes use of the conference name, slogan, copyright for publications, and/or logo ownership.
- Provisions for dissolving the relationship
- Assignment of conference management and other administrative responsibilities to the appropriate organizational units.
- General conference management accountabilities such as assignment of chairs, organizational unit chairs for conference committees, steering committee obligations, location of the conferences, associated exhibitions, etc.
- When a conference is sponsored jointly with another non-IEEE organizational unit, the IEEE organizational unit shall assure that the IEEE financial responsibility is limited to the IEEE organizational unit's financial capabilities and does not extend to Institute General Funds.
- For conferences where IEEE organizational units are the sole sponsors, the IEEE Executive Committee has final authority in resolving any disputes. In the absence of a Memorandum of Understanding, the IEEE Executive Committee will adjudicate any matters.

10.11 CONFERENCE PUBLICATIONS

As stated in the IEEE Policy Manual Section 10.1.20:

Conferences typically produce proceedings that are provided at the conference to attendees and/or are available for sale after the conference. Ownership of these publications is determined by copyright. Sale of these publications may be handled by the Book Broker Program, (Policy 6.5). Participation in this program requires the completion of the IEEE Conference Publication Form, which should be submitted to IEEE Conference Services. This allows the proceedings to be considered for post-conference distribution through the Book Broker Program and to facilitate IEEE ownership of copyright, (Policy 6.14). IEEE sponsoring organizational units make the decision on participation and terms**.** (Policy 10.1.17) See the IEEE Meetings Organization Manual for details.

10.12 BOOK BROKER PROGRAM

Conferences are urged to make use of the Book Broker Program to handle all post-conference sales and inventory of proceedings by submitting the Conference Publication Form, which is available from the TAB Products Group. At least one copy of each IEEE conference publication should be delivered to the TAB Products Group upon publication to insure that all IEEE publications are available from IEEE Headquarters.

The production cost of such IEEE conference publications will be borne by the conference or sponsoring organizational unit. The Book Broker Program will determine the number of books it will purchase for post-conference sales based on the sales history for that particular conference proceeding. The acquisition payment is based on a matrix of actual average printing and production costs of any book to be reviewed annually by the TAB Conference Publications Committee.

The Book Broker Program will systematically notify members, libraries and other potential subscribers of the availability of new conference proceedings, as well as those in stock.

The post-conference selling price to non-members must be greater than the price to members. IEEE recommends that the non-member list price should normally be twice the member price, but in no case should the ratio be less than 1.5 to 1.

The Book Broker Program is administered by the Products - Conference Proceedings staff, with the oversight of the TAB Conference Publications Committee.

Editorial Note - Reference:

IEEE Meetings Organization Manual has been prepared for the conference planner's use. Included in the guide is a typical planning schedule, where IEEE requirements have been highlighted to differentiate them from recommendations. Also included are revised general information and financial and publications forms, which are required to be completed by the conference planner. Instructions for completing these forms are found on the reverse side of each. Reference is made to the IEEE Bylaws and the IEEE Policies and Procedures Manual. These documents by their very nature, are subject to revision. The meetings Organization Manual attempts to reflect up to date references. Should any questions arise, please contact IEEE Conference Services, who will interpret IEEE policy and furnish updated Bylaws and/or Policy Manuals.

Reference is made to IEEE Conferences Services as the primary link between the conference and IEEE Headquarters. IEEE Conference Services has many other services to offer - some gratis, others for a nominal fee - which are referred to throughout this manual. You may inquire about these other services at:

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http://www.ieee.org/organizations/tab/conflink.html