

IEEE CEDA Conference Organization: Getting Started

1. Introduction

It is likely that you are reading this document because you submitted an application to organize an IEEE Conference with the support of the Council on EDA (CEDA) and your peers have decided that you are the right person to do the job. In that case, congratulations on this important achievement in your career!

Maybe you have previously organized one or several IEEE sponsored or co-sponsored events. In such case, in addition to some “Certificates of Appreciation”, you have an invaluable experience that should be the main source of reference for the work you have to do in the coming months. You may find here, anyway, some updated information related to CEDA sponsored events that could be of interest for your work as conference organizer. Conversely, it is possible that this is the first time you assume the responsibility of organizing an IEEE event. This is very good news for IEEE CEDA, because at CEDA we believe conferences offer a unique form of personal networking activity in the EDA community that should be preserved, and incorporating new blood to this community is essential to ensure its continuity and success. Nevertheless, it is not unusual that people facing for the first time the organization of an IEEE Conference feel a bit overwhelmed by the large amount of activities they have to develop, the forms they have to fill in, and the specific jargon involved in the process that they are expected to lead. If this is the case, this document is specially conceived for you, as it provides a brief guideline of the required steps for the organization of a CEDA-related conference.

While you can find all the required forms and documents in the IEEE Conference Organizers webpage (http://www.ieee.org/conferences_events/conferences/organizers/index.html), and you should certainly check the documents entitled “**How to organize an IEEE Conference: Checklist & Timeline (C&T)**” (<http://www.ieee.org/documents/30012586.pdf>) and “**IEEE Conference Organizer’s Manual (COM)**” (<http://www.ieee.org/documents/manual.pdf>) as the main references, this short document offers a summary of the main steps you have to complete (especially the most urgent ones), trying at the same time to decode the somewhat unfamiliar jargon that is used in this context. It is also highly recommended to keep in close contact with the previous year’s General Chair/Program Chair, as they have just gone through the same path you are starting now. Also, do not hesitate to consult with the Vice-President (VP) of Conferences and the Conference Subcommittee of CEDA (a list of current members is always available on our CEDA Committees page of the CEDA website).

There is also a periodic publication entitled “IEEE Conference Organizers' News” (<http://newsmanager.commpartners.com/ieeemeet/issues/>) where you can find all the relevant news and information from IEEE Conference Business.

In the next section you can find a summary of the Conference Organization Timeline. The rest of the document is organized in a series of short paragraphs where you can find specific

information regarding financial, administrative and technical issues, as well as relationships with IEEE.

2. Conference Organization Timeline

This section describes the most important steps to be completed for the organization of a small/medium size conference. Larger conferences may require additional steps as described in the C&T document.

- Start. It is strongly recommended that the preparation of the Conference starts as early as possible, typically between 24-18 months before the Conference date. You must apply for sponsorship from the adequate sections, subsections, regions, etc. of IEEE that are best suited to sponsor your conference. In all the IEEE documents, these entities are called "Organizational Units (OUs)". There are also references to MGA OUs, which mainly means IEEE Chapters, namely, parts of the geographic organizational units under the IEEE Membership and Geographic Activities (MGA) organization. To proceed with this first step, you can fill on-line your application for IEEE sponsorship at http://www.ieee.org/conferences_events/conferences/organizers/conf_app.html, where you will find a multi-page form that is intended to be completed in approximately 20-30 minutes. It is recommended to have collected in advance all the information that will be needed while filling out the form. This information is fully described in a document entitled "IEEE Conference Application Checklist", which can be downloaded from http://www.ieee.org/conferences_events/conferences/organizers/icx_required_information_checklist.pdf. Information from your peers from past editions of the Conference may be not only helpful, but the quickest way to go through this first step.
- If the conference is co-sponsored by several IEEE entities, or at least one non-IEEE entity, a "Memorandum of Understanding (MoU)", which delimits the percentage of participation and the responsibilities of all the parties, is also required. You can download this document from http://www.ieee.org/conferences_events/conferences/organizers/memorandum_of_understanding.html, and in most cases it can be completed quite easily. In case you have questions related to the MoU, you can contact the current VP of Conferences of CEDA (conferences@ieee-ceda.com).
- Contract a conference management company, if applicable (ideally right at the start of your planning, i.e., typically 24-18 months before the Conference). This may depend on the characteristics of the Conference and the location. In general, it is advisable to have the support of a specialized company to manage the conference registration, and some logistics regarding conference handouts, social events, etc. It should be observed that all conference contracts with a value of \$25,000 or greater must be reviewed by IEEE.
- Apply for grants for Conference support (this step should typically be performed 24-18 months before the conference). Grants coming from local institutions are usually of key importance to have a balanced budget. Considering the delays that processing local grants usually involve, it is recommended that you submit the applications as

soon as possible. In addition, you should make a realistic estimation of the funding that the conference will receive, as the projected conference budget will be revised by IEEE CEDA and the IEEE Conference Services.

- Submit the conference budget to the IEEE Conference Finance Department (15-12 months before the Conference). You must fill out on-line the “IEEE Financial Web Form – Budget”, which you can find at <http://ta.ieee.org/Financial/default.aspx>, and provide written approvals from all IEEE financing sponsoring OUs of your Conference. 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 OUs approval.
- Declaration of acceptance of the IEEE Principles of Business Conduct and conflicts of interest (15-12 months before the Conference). The General Chair and Finance Chair must fill the on-line “Form for Principles of Business Conduct Compliance Certificate and Conflict of Interest Disclosure Statement” that can be found at <http://www.ieee.org/about/corporate/compliance/coiandpob.html>.
- If the proceedings are going to be published by IEEE, you must submit the “Conference Publication Form” (12-9 months before the Conference). This is an important step because it provides the IEEE Catalog Number, Library of Congress Number, ISBN and ISSN, which are required in subsequent steps of proceedings publication with IEEE. Within the same period, you must also register for “Electronic Copyright Form”.
- Organize the management of technical paper submission and review process (12-9 months before the Conference). Some existing conference management systems, such as EasyChair (<http://www.easychair.org/>), which is free of charge, or START V2 (<http://www.softconf.com/about/>), may be useful for this process.
- Create a registration form (9-6 months before the Conference). As the registration form may include discounts for IEEE members, you must request the “IEEE membership verification CD” to confirm valid IEEE members.
- Complete the paper review process (6-4 months before the Conference) and finalize the technical program with the complete list of accepted papers to be presented at the event, organize the technical sessions where the papers will be presented and appoint session chairs. It is essential at this point to send detailed instructions to the speakers in order to register for the event and have the correct guidelines to prepare the presentation for their accepted papers.
- Launch the registration website (6-4 months before the Conference).
- Organize the publication of Conference Proceedings (at least 4-3 months before the Conference). If the Proceedings are going to be produced by IEEE, you must refer the information that you obtained when you submitted the “Conference Publication Form”. IEEE can only accept papers in Acrobat PDF format that are IEEE Xplore-compatible. Thus, all the final versions of the papers have to be submitted by the authors to the IEEE PDF eXpress® or PDF eXpress Plus® tool (http://www.ieee.org/conferences_events/conferences/publishing/pdfexpress.html) to check (and create, if necessary) IEEE compliant PDF versions of their papers.

3. Financial information

It is likely that you prepared a tentative budget when you submitted your application. This should simplify your job. However, please do not forget that you need to convince your sponsoring units that the budget is realistic and the final balance is positive, so that some surplus can be reasonably expected. This is of extreme importance because any generated surplus is to be transferred to the sponsoring entities and, conversely, in case of losses, the sponsoring entities are liable for them. In general, the 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. Given that usually registration fees are the main source of income in IEEE conferences, you should make a realistic estimation of them, as well as the number of attendees. Typically registration fees should be kept similar to those of previous editions of the conference in order to target a similar number of attendees, where possible; It would be advisable to discuss alternative pricing models. The IEEE OU might require additional clarifications of any significant increase or decrease in registration fees with respect to previous editions of the conference. In addition, in order to keep registration fees as low as possible, and thus promote participation, it is very important to have a detailed plan to apply for grants from local institutions or companies. You should always keep the outcome of this plan within realistic margins considering the economic situation of your local environment and conference venue. Also, there is an administrative fee to be paid to IEEE that must be included in the budget.

4. Administrative items

In small/medium size conferences, volunteers usually play an important role in ensuring that everything runs smoothly during the days previous to the conference, and the conference itself. It is advisable to have the volunteers selected in plenty of time, so that they can receive the adequate instructions and training. It is also recommended to schedule some briefings in the days before the conference, so that everyone is perfectly aware of his/her responsibilities and how to proceed in case of any problem. During the conference all the volunteers should be permanently in contact with some member of the local organization committee previously appointed by you.

The help of a firm specialized in conference management may considerably simplify the administrative processes, especially those which involve financial management, like registration, payment to local providers for catering or handouts, etc. They can also help with the design and hosting of the conference web page, if the conference does not have a stable website from previous editions.

Offering lodging facilities is lately becoming a source of complaints from the attendees, because they may frequently find that better prices are available making reservations directly on the web. Be careful about this. And unless it is mandatory to hold the conference in a hotel and reserve a block of rooms, you may consider just offering some useful information about lodging, but without any specific agreements with hotels.

5. Technical committees

Even if this is your first IEEE conference, you will likely have previous experience participating in the Program and/or Organizing Committees. So, you should be aware of the typical structure of the Committees you have to configure for the specific CEDA-related conference you are organizing.

Of course, configuring a technically sound and attractive program is the main goal of every IEEE conference, because this attracts interest of potential attendees and is essential to generate references to published papers, which is, in turn, the key for the reputation of the conference. To reach such objective you should rely on the leaders of the area of interest where your conference falls and, therefore, you should make every effort to have them listed in the Program Committee. Getting advice from the last Program Chair is strongly recommended.

Most IEEE conferences have traditions on the composition of their committees, which you may find helpful for your job. You can also refer to pages 10-11 of the COM for a detailed description of specific committees, although depending on the size and traditions of the conference some of them may not be necessary.

6. Relationships with IEEE

It is in the interest of IEEE CEDA that your conference is a technical and professional success. The organization will help you on any question or trouble you may find all along the process. At the end of both the C&T and COM documents there is a list of IEEE contacts that you may find useful depending on the specific step you have to tackle.

Earlier in the process you will decide and apply for a specific type of sponsorship from IEEE CEDA. There are several possible levels of IEEE involvement, and this determines the procedures to follow in subsequent steps. The three main kinds of IEEE sponsorship are:

1. sole sponsorship,
2. co-sponsorship and
3. technical co-sponsorship.

In a sole sponsorship there is one sole IEEE OU involved in the conference, and the IEEE logo and name must be included in the conference title and all publications and announcements. In the second type, there is a shared involvement of several entities, at least one of which is an IEEE OU and the rest are not-for-profit organizations. The third kind corresponds to conferences where there is a substantial involvement of IEEE in the organization of the technical program, but not in financial issues. For conferences of the last two types the aforementioned Memorandum of Understanding is mandatory. More information on kinds of sponsorship can be found in the COM document (pages 5-7).