



Technical Meeting Handbook (TMH)

(Updated November 2018)

The IEEE Computer Society strives to offer the best possible meetings that advance the current technology in the computer engineering field. Organizing outstanding meetings relies on the effort of willing volunteers like you and your committee members.

This handbook is a guide providing information on how to organize a meeting in conjunction with the policies and procedures of the IEEE and IEEE Computer Society. Policy statements are indicated by *italics* or referenced in the form of Web links. To maintain your technical meeting in good standing with the *IEEE Computer Society* and the *Technical and Conference Activities Board*, these policies must be followed.

On behalf of the *IEEE Computer Society*, we would like to thank you for your organizing efforts and wish you success in planning your meeting.

*Technical and Conference Activities (T&C) Board
IEEE Computer Society*

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1 INTRODUCTION

This handbook is organized by topic and features URL links to information that will assist you in preparing for a successful technical meeting. Please keep in mind that this handbook is not comprehensive and is intended to provide basic guidelines for organizing an IEEE CS-sponsored meeting. If this is your first sponsored meeting or you are new to IEEE CS conference organizing, you will work with an IEEE CS staff Conference Planner, who will be your direct contact throughout the planning process.

1.1 **Technical Meetings Policy and Procedures**

Please review the IEEE-CS Policies and Procedures Manual Section 6.4 (TECHNICAL MEETINGS). The manual may be accessed online: <http://www.computer.org/portal/web/volunteercenter/ppm6>

Please send any questions about financial sponsorship to conferences@computer.org for technical co-sponsorship please send questions tcsrequests@computer.org.

1.2 **IEEE Computer Society Name/Logo and Technical Committee Linking**

After receiving written Part 1- Sponsorship Approval, sponsored and co-sponsored meetings must use the name and logo of the IEEE CS and the logo of the IEEE on all conference material including websites, announcements, calls for papers, stationery, advance programs and final programs. In addition, please note the following:

- For new conferences, IEEE must be at least a 50% financial co-sponsor (total) before the IEEE acronym may be used in a conference title or name.
- If the IEEE CS is a sponsor, then the name "IEEE Computer Society" must appear in the list of sponsors.
- *The name and logo may not be used in any fashion before written sponsorship approval is obtained.*¹
- In addition, conference websites must list and link to the endorsing Technical Committee/Council(s) (TCs) along with a link to the TC home page. <https://www.computer.org/web/tandc/technical-committees>
- In published Conference Proceedings, a page describing the endorsing Technical Committee/Council(s) must also be included.

2 APPLYING FOR SPONSORSHIP

2.1 **Sponsorship Defined**

All forms of sponsorship require endorsement through the Technical Committees (TCs), who are the subject matter experts. The list of Technical Committees can be found on the IEEE Computer Society's Web site (<https://www.computer.org/web/tandc/technical-committees>). See Section 11.4 for an explanation of TC's role in endorsing sponsorship of conferences.

Sponsorship	Full Financial Sponsorship defined: The IEEE CS is the sole financial sponsor of the meeting, accepting all financial and legal liability. All assets, tangible and intangible, including the name, shall be the property of the IEEE CS. In addition, the TC Chair(s) or designate will serve as an ex officio (by virtue of office) voting member of the Conference Steering Committee.
Co-sponsorship	Financial Co-sponsorship defined: The IEEE CS shares in the financial and legal liabilities according to the applicable percentage of sponsorship. All assets, tangible and intangible, including the name, shall be the property of the sponsors in proportion to their respective share of conference sponsorship. Advance loans and any surplus or loss must be shared in proportion to the percentage of sponsorship. In addition, the TC Chair(s) or designate will serve as an ex officio voting member of the Conference Steering Committee.
Technical Co-sponsorship* (Non-Financial)	<p>Technical Co-sponsorship (TCS) defined: The IEEE CS participates and will be directly and substantially involved in the technical program. However, IEEE CS has no financial or legal responsibility for the meeting.</p> <p>To request Technical Co-sponsorship, please contact tcsrequest@computer.org to obtain the necessary application form and instructions. A nonrefundable application processing fee will apply.</p> <p>Criteria for Technical Co-Sponsorship</p> <p>For TC Chairs: Consideration for Technical Co-Sponsorship should take into account tangible benefits that will result from non-financial collaborations with other entities. These include, but are not limited to the following:</p> <ul style="list-style-type: none"> • The conference is attempting to coordinate with, and has received permission from, a CS-sponsored meeting to share a venue and coordinate programs; • The conference’s scope addresses a new technical area in which the IEEE CS is interested but not currently involved; • The conference’s deliverables will provide a measurable contribution to the profession and the IEEE CS; • The conference honors a person or an event representing a highly recognized contribution to the profession; • The meeting’s organizing and program committees include a significant representation of the IEEE CS’s membership; • The conference agrees to the posting of presented works or authored materials in the IEEE’s digital library by assigning copyright to the IEEE. In lieu of copyright assignment to IEEE, the conference will grant the IEEE rights use permission. These works and materials include, but are not limited to, any conference publications, presentation materials, multimedia files, etc.; • The conference provides discounted registration fees to the IEEE CS’s membership not greater than the Member rate of the Financial Sponsor(s).

***NOTE: The APPLICATION FOR TECHNICAL CO-SPONSORSHIP may be found at:**
<https://www.computer.org/web/conferences/sponsorship>
 or contact tcsrequest@computer.org.

2.2 New Conferences: Sponsorship Review and Approval Process

2.2.1 Steps to Obtain Sponsorship Approval of NEW Conference

	<p>Please note: The Conference Activities Committee (CAC) will review all NEW Financial Conference requests.</p>
1	<p>The General Chair or other member of the conference committee emails Erin Bae, <i>Customer Relations & Project Specialist</i> at, ieee-mce@ieee.org OR conferences@computer.org.</p> <p>The <i>Customer Relations & Project Specialist</i> will send an instructional email with first steps outlined to the conference organizers explaining the approval process.</p> <ul style="list-style-type: none"> • Completion of the IEEE Conference Application in the IEEE Conference Exchange (ICX): “Start a New Application” <p>http://www.ieee.org/conferences_events/conferences/organizers/conf_app.html?utm_source=m&utm_medium=conf_app&utm_campaign=conf_app&utm_term=conference%20application</p> <ul style="list-style-type: none"> •
2	<p>Upon the completion of the IEEE Conference Application the following two steps will occur:</p> <ol style="list-style-type: none"> a) Review of the conference application and technical content of the proposed NEW conference will be reviewed by the Conference Activities Committee (CAC). CAC will be validating the following data: <ol style="list-style-type: none"> 1. Does the new conference title overlap significantly with the title of any of the conferences already in the portfolio? 2. Does the new conference have a unique acronym not in use at the IEEE already? 3. Do the dates of the proposed new conference overlap with any other CS conferences in that field? 4. Is the new conference seeking sponsorship from the appropriate TC(s)? b) Once the conference request (application) is approved by CAC, a request for TC(s) endorsement is sent to the TC(s) listed in the completed application. <p>Please note: Approval from both the endorsing TC and CAC are required to move forward with the IEEE CS conference approval process of a NEW conference.</p>
3	<p>After the submission of the conference application, the next step is to have the Conference General Chair and Conference Finance Chair complete the required online IEEE Conflict of Interest (COI) form.</p> <p>COI Submission: http://www.ieee.org/about/corporate/compliance/coiandpob.html</p> <p>Upon successful completion of the COI, you will receive an email from the IEEE, please save and send a copy to Erin Bae at, ieee-mce@ieee.org.</p>

4	<p>Once a conference has completed the steps above; the assigned Conference Planner will be notified and will work with the Conference Finance Chair on completing the following items:</p> <ul style="list-style-type: none"> • Budget creation and approval <p>NOTE: <i>New conferences must budget for a 15% contingency (for unplanned expenses, etc.) into the conference budget. The budget will be reviewed for approval by the Technical Meeting Request Committee (TMRC).</i></p> <p>Conference Bank Accounts Conference Bank Accounts All IEEE Computer Society conference bank accounts must have the signatures of at least two volunteers and an IEEE Computer Society staff representative, except as prohibited under local government regulations, in which case a monthly detailed bank account statement must be provided to the IEEE Computer Society. All conferences must disclose all bank accounts they are using in order to obtain IEEE Computer Society sponsorship approval.</p> <p>The IEEE offers a Concentration Banking Account, which is a checking account that allows unlimited check writing with no per check charges that does not levy monthly service fees and pays a higher interest rate than traditional business checking accounts. Interest is payable from day of deposit to day of withdrawal. You can access and download monthly Concentration Banking statements online.</p> <p>For more information about the IEEE Concentration Banking account, please visit: http://www.ieee.org/membership_services/services/financial/treasury/concentration.html</p> <p>Conference Venue: The venue for your conference must be selected and at minimum, a proposal with pricing for room rental, food & beverage must be provided to your assigned ConferencePlanner.</p> <ul style="list-style-type: none"> • Please note: Your assigned Conference Planner may send out a formal Request for Proposal (RFP) to potential hotels and/or venues for your conference and assist in the venue selection process. <p>*All Contracts/Agreements are required to be reviewed and approved by the IEEE Legal Department. Conference Organizers are not allowed to sign contracts/agreements unless otherwise approved by IEEE Legal to do so.</p> <p>Please reference the IEEE Finance Operations Manuel, Section 8: https://www.ieee.org/documents/financial_ops_manual.pdf</p> <p>Conference Registration: The IEEE provides two registration options, CVent or Regonline. As part of the budgeting process, the conference registration system will need to be identified. Please work with your assigned Conference Planner to obtain more detail information and pricing for CVent and Regonline.</p>
5	<p>Once all requirements and documents are completed the Conference Planner will request Sponsorship/Budget approval from:</p> <ul style="list-style-type: none"> • Endorsing TC(s), please allow five business days. • Technical Meeting Request Committee (TMRC), please allow 7-10 business days. • IEEE CS staff management. Please allow five business days for review and approval.
6	<p>Once final sponsorship/budget approval is given, the conference organizers will receive an official approval email from the IEEE.</p>

2.2.2 Policies for New Conferences

NOTE: The minimum percentage of CS sponsorship required is 50% of NEW conferences and a minimum of at least 50 paid attendees. Expected attendance at time of conference closing for a NEW conference is at least 50

final paid attendees or greater. If the final attendance falls below 50 the conference will be placed on the IEEE CS “Watch List” for the following year. If the conference fails again to close with a minimum of 50 final paid attendees or greater they will be asked to co-budget under a flagship conference the following year, if the conference chooses not to, the IEEE Computer Society may choose not to financially sponsor this event in following years.

- **Deadlines** – The conference committee is required to contact the IEEE CS and initiate the sponsorship approval process at least **12-18 months** prior to the proposed conference start date. This allows sufficient time for the TC review, TC endorsement, IEEE CS negotiations of hotel contracts, review and approval of the budget, paper submission and review process, and advertising for the event.
- The Conference Activities Committee (CAC) will review all NEW Financial Conferences to determine the following; does the NEW conference title overlap significantly with the title of the conference already in the portfolio; does the NEW conference have a unique acronym not in use at the IEEE already; do the dates of the proposed NEW conference overlap with any other CS conferences in that field; is the NEW conference seeking sponsorship from the appropriate (TC)s.
- **TC Endorsement Criteria** -- The TC will evaluate NEW conferences in the context of the value to the TC, current sponsored conferences and competing events, the ability of the conference and its organizational structure to sustain itself, as well as the conference leadership. The decision to endorse a conference for IEEE CS sponsorship is made by the TC Chair.
- **Budget by Appointment** -- The “Budget by Appointment” option provides assistance to conference organizers in developing a strong budget for their conference. To schedule a Budget by Appointment teleconference, please contact your assigned Conference Planner

NOTE: *Sponsorship is subject to revocation if the budget is not approved on time, based on the budgeting schedule provided. See Section 3 below for more information on budgeting.*

- **IEEE CS Conference Calendar** -- The conference is added to the IEEE CS conference calendar after sponsorship is approved.

Future Instances of the Conference (See Renewing Conferences below) -- After the initial approval process, following years’ conferences will need to follow the sponsorship renewal process described below.

2.3 Renewing Conferences: Sponsorship Review and Approval Process

NOTE: Any proposed change in sponsorship percentage for a renewing conference must be reviewed and approved by the sponsoring Technical Committee (TC). Where sponsorship changes to a non-IEEE CS entity, the IEEE requires a co-sponsorship Memorandum of Understanding (MOU). During the process, the TMRC will also review the conference’s Steering Committee charter and may recommend changes.

2.3.1 Steps for Review/Approval of RENEWING Conference; Two Part Approval Process

1.	<p>The General Chair or other member of the conference committee contacts Erin Bae, Customer Relations & Project Specialist, ieee-mce@ieee.org. OR conferences@computer.org.</p> <ul style="list-style-type: none"> • The <i>Customer Relations & Project Specialist</i> will send an instructional email outlining the Two-Part Approval Process for renewing conference. • Part 1- Sponsorship Approval: Completion of the IEEE Conference Application in IEEE Conference Exchange (ICX): “Start a New Application” http://www.ieee.org/conferences_events/conferences/organizers/conf_app.html?utm_source=mm_link&utm_campaign=conf_app&utm_medium=conf&utm_term=conference%20application
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	<p>After the submission of the conference application, the next step is to have the Conference General Chair and Conference Finance Chair complete the required online IEEE Conflict of Interest (COI) form. COI Submission: http://www.ieee.org/about/corporate/compliance/coiandpob.html</p> <p>Upon successful completion of the COI, you will receive an Email from IEEE, save as a .PDF and send a copy to Erin Bae at, ieee-mce@ieee.org.</p>
2.	<p>Part 2- Budget Approval Process: <i>Once a conference has been given Part 1- Sponsorship Approval; the assigned Conference Planner will be notified and will work with the Conference Finance Chair on the completing following items:</i></p> <p>Budget creation and approval – Conference Planner will send the most updated budget template for completion.</p> <p>Conference Bank Accounts All IEEE Computer Society conference bank accounts must have the signatures of at least two volunteers and an IEEE Computer Society staff representative, except as prohibited under local government regulations, in which case a monthly detailed bank account statement must be provided to the IEEE Computer Society. All conferences must disclose all bank accounts they are using in order to obtain IEEE Computer Society sponsorship approval.</p> <p>The IEEE offers a Concentration Banking Account, which is a checking account that allows unlimited check writing with no per check charges that does not levy monthly service fees and pays a higher interest rate than traditional business checking accounts. Interest is payable from day of deposit to day of withdrawal. You can access and download monthly Concentration Banking statements online. For more information about the IEEE Concentration Banking account, please visit: http://www.ieee.org/membership_services/services/financial/treasury/concentration.html</p> <p><i>If using an IEEE Concentration Bank Account a Fiscal Agent MoU must be executed for Universities and Government research institutions.</i></p>
3.	<p>For budgets with a total expense or income of \$250K USD or greater or if the conference closed in a deficit in the past 2 years, the Technical Meeting Request Committee (TMRC), tmrc@computer.org, must review the conference budget for approval, please allow 7-10 business days.</p>
4.	<p>All related conference contracts such as, hotel, catering, audio visual, special event venue, transportation, etc. are to be sent to your assigned Conference Planner. Your Conference Planner is able to negotiate all contracts and ensure that all terms and conditions follow IEEE standard policies and procedures.</p> <p>*All conference contracts are required to be reviewed and approved by the IEEE legal department. Conference Organizers are not to sign agreement until otherwise advised upon the approval of a contract/agreement by the IEEE legal department for contracts that are under \$25,000.00 USD. If IEEE legal approval is not obtained and a Volunteer signs a contract, financial responsibility for this contract may lay with the Volunteer or his/her institution.</p>

	<p>Please reference the IEEE Finance Operations Manual, Section 8: https://www.ieee.org/documents/financial_ops_manual.pdf</p> <p>Conference Registration: The IEEE provides two registration options; Cvent or Regonline. As part of the budgeting process, the conference registration system will need to be identified. Please work with your assigned Conference Planner to obtain more detail information and pricing for Cvent and Regonline.</p>
5.	<p>Once all requirements and documents are completed, the Conference Planner will request approval from:</p> <ul style="list-style-type: none"> • Endorsing TC(s), please allow five business days. • Technical Meeting Request Committee (TMRC) if applicable, please allow 7-10 business days. • IEEE CS staff management. Please allow five business days for review and approval.
5.	<p>Once final sponsorship/budget approval is given, the conference organizers will receive an official approval email from your Conference Planner.</p>

Sponsorship Approval in Advance of Budget Approval (the Two-Part Approval Process)

If previous consecutive instances have been approved for IEEE CS financial sponsorship, and these same conferences have not closed in a deficit, the renewing conference is eligible to participate in the Two-Part Approval Process (sponsorship and then budget approvals).

Sponsorship Approval Requirements:

- Previous Conference Years are financially closed
- IEEE Conference Application is completed (ICX)
- Co-sponsorship Memorandum of Understanding (MOU), if applicable. MOU is generated at the time of the completion of the IEEE Conference Application (ICX) and approvals will be completed electronically.
- Conflict of Interest Disclosure (The General Chair, General Co-Chair, and Finance Chair must — each complete the form) : <http://www.ieee.org/about/corporate/compliance/coiandpob.html>
- TC Endorsement
- Committee List: General Chair, Technical Program Chair, Finance Chair, Publication Chair (if any) and Information Contact. Complete contact information including home or work address, phones (work, home or mobile), fax (if any), and preferred Email are required. If and when available, additional committee members who serve in a critical role may be added to the list so that they will enjoy the standard liability insurance coverage provided to all conferences by IEEE. Examples include Local Arrangements Chair(s), Exhibit Chair(s), Publicity Chair(s), Program Committee Vice Chairs, Workshop Chair(s), and Steering Committee Chair(s) and Members.

Budget Approval Requirements (budgets are due at the very latest 6 months prior to conference for renewing conferences):

- Submission of the conference Budget to your assigned Conference Planner
- Publishing Quotes
- IEEE Concentration Bank Account or Fiscal Agent MoU finalized for Universities/Government Institutions
- Hotel/Venue and all conference related contracts (catering, audio visual, etc.) have been negotiated: (Please note: IEEE Strategic Sourcing will not approve nor sign contracts prior to completion of Part 1- Sponsorship Approval from the IEEE CS.
- Confirmation of registration system.

NOTE: In following best practices, we recommend that Conference Chairs use the “Actual” Column in the approved budget template to track income and expenses, therefore using the template as a “working budget”.

2.3.2 IEEE Conference Xchange system (ICX)

All conferences must be established in the IEEE Conference Exchange (ICX) to register the conference in the IEEE database (approvals still follow the Computer Society process).

http://www.ieee.org/conferences_events/conferences/organizers/conf_app.html?utm_source=mm_link&utm_campaign=conf_app&utm_medium=conf&utm_term=conference%20application

Checklist:

http://www.ieee.org/conferences_events/conferences/organizers/icx_required_information_checklist.pdf

Upon submission of the ICX form, you will receive a confirmation email from the IEEE with your IEEE Conference Record Number.

2.4 Watch List (Deficit) Conferences Requirements:

The IEEE CS assumes sponsored conferences’ financial risk. As a result, conferences operating in a deficit have a negative impact on the conference as well as the overall organization. Conferences closing in a deficit will be placed on a “**Watch List**” and will be carefully monitored to mitigate or eliminate further financial risk/liability. These conferences will be subject to financial management and assistance by TMRC, greater TC program involvement, organizational restructuring assistance, etc. Conferences can remain on the Watch List for no longer than two cycles; after that, if the conference cannot demonstrate evidence of strong improvement, sponsorship will be revoked. The TMRC, with input from the TC and staff, will make the determination. Conferences that also close non-compliant will be added to the TMRC watch list.

- A. If the conference was moved to the Watch List due to a closing deficit, the TC will provide oversight for the planning and budgeting of the Watch List conference.
- B. Watch List conferences are required to use the CS Budget by Appointment process, and the budgeted contingency will be increased to 15% (from 10%). Staff support is also required for all vendor RFPs and contract negotiations and execution.
- C. The Conference Chair must submit the budget for T&C review no later than 6 months prior to the start date of the conference, or sponsorship will not be approved.
- D. The official IEEE Computer Society closing of the conference must be completed within 9 months of the conference end date. Per IEEE policy if using an IEEE Concentration Banking, the bank account will be closed no later than 6 months after the conclusion of a conference.
- E. Failure to adhere to any of the required procedures will result in revocation of sponsorship immediately upon written notification to the conference’s Steering Committee Chair or General Chair(s) without further due process.
- F. Conferences unable to move off the Watch List may co-locate and co-budget with a more successful IEEE event.

3 CONFERENCE BUDGET REQUIREMENTS

3.1 Budget Review

IEEE CS Conference Planners are aware of industry trends and practices and can help organizers leverage the IEEE buying power in negotiating contracts.

3.1.1 Administration Fee - General

All IEEE CS Sponsored or Co-Sponsored meetings must budget for a CS administration fee of 20% of all expenses minus grants/donations or a minimum fee of \$5,000, whichever is greater. The fee is proportionate to the percentage of IEEE CS sponsorship.

3.1.2 Administration Fee – Large Conferences

For conference budgets approved on or after July 1, 2018 and all conferences occurring in 2019 and later, where IEEE CS portion of budgeted or actual expenses are \$250K or greater, the IEEE CS admin fee is calculated on a sliding scale starting at 20% for the first \$250K, and reduced by 2.0% for each additional \$250K of expenses, with a minimum of 6%.

The admin fee is reinvested in the IEEE CS and funds the following: actual costs of conference program, and other non-surplus-generating cost centers (e.g., Awards, Grants, Standards, Chapter and Regional Activities, etc.).

NOTE: The 20% CS Administration Fee is roughly equivalent to the IEEE requirement of a 20% budgeted surplus.

3.1.2 Grant or Donor Income Exemption from Admin Fee

Conferences that provide documentation of grant income, may spend the grant funds without applying the Admin Fee. Normally, all conference expenses are subject to the Computer Society Admin Fee. All grant income must be substantiated with a letter or confirmation email verifying the award.

3.1.3 Contingency for New and Renewing Conferences

Renewing conferences must budget for 10% contingency. New conferences must budget for 15% contingency. Best practice recommends increased registration fees and a 20% contingency for conferences moving from IEEE Regions 1 – 6 to 7 – 10 (to account for, VAT or other consumption tax, conference space cost, increased committee travel, and head-count-based attendee food and beverage guarantees negotiated in many international hotel / venue contracts.)

3.1.4 Budget Variance

Any proposed changes to a previously approved budget's revenue or expense line items representing an amount over 20% will need to be immediately resubmitted to your Conference Planner.

3.1.6 Registration Fees

- The registration fee for any IEEE or IEEE CS member must be the lowest fee offered to any attendee, except for the discounted fee offered to full-time student member of Financial Sponsor organization(s), retired members, life members, or other special fees: (such as a subsidy of registration fee(s) by grants or patron donations by other not-for-profit or commercial organizations for low income attendees in IEEE Regions 7-10).
- For those meetings for which the IEEE CS is a sponsor, the registration fee for non-members including student non-members should be 20% to 50% higher than the fee for an attendee who is a member of the IEEE, the IEEE CS, or any other cosponsoring or cooperating entity.
- Full-time student registration fees should cover cost of meals, proceedings, and other variable expenses.
- There must be separate rates for student members and student non-members. They should follow the same guidelines as member/non-member rates.

3.1.7 Financial Closing Policies – Past Conferences Can Affect Your Budget

All IEEE CS sponsored or cosponsored meetings are required to complete the closing process. All closing documentation, including the IEEE Computer Society's Administrative fee and its share of the surplus, if any,

must be submitted no later than nine (9) months after the meeting's end date. Advance loans must be returned within 30 days of the conference's conclusion.

All financial accounts must be closed within nine (9) months after the meeting, unless using an IEEE Concentration Bank Account this account will be closed by the IEEE (6) months after the conclusion of the meeting. The current budget may not be approved if there is an outstanding Final Report from a previous instance of the conference.

NOTE: IEEE charges the CS a penalty fee for conferences that are not officially closed, starting in the 13th month after the conference end date.

3.1.8 Surplus

Surplus is defined as the balance of revenue remaining after covering all conference expenses, including the IEEE CS administration fee, conference publishing fees, and auditing fee (if required). To encourage efficient and timely closing of conferences, CS policy specifies that the sponsoring TC(s)'s surplus allocation is based on the timely submission of the conference's Final Report and conference closing.

3.1.9 Surplus Reinvestment for Qualifying Conferences

Computer Society conferences that meet the following qualification can reinvest a portion of conference surplus in the **conference two years out**: conference must close financially within (9) nine months of the conference end date (this excludes any financial steps not under control of the conference (e.g., completion of IEEE audit).

For qualifying conferences, 25% (33% starting in 2016) of the Computer Society's portion of conference surplus will be made available by the Computer Society to be reinvested in the conference two years out (year x + 2). Reinvestment funds are available for a single conference year and may not be spread across multiple future instances. After a conference (year x) is financially closed and the conference surplus is known, staff will let the General/Finance Chair of the conference two years out (year x+2) know the amount available as "IEEE CS reinvestment" to the conference budget. For example, reinvestment funds from ABC 2015 will be applied to ABC 2017.

NOTE: Computer Society already credits 50% of the conference surplus to the sponsoring TC's annual allocation when the conference closes within 6 months. Starting in 2016, 33% of the conference surplus will be credited to the sponsorship TC's allocation when the conference closes within 9 months.

The remaining balance of the surplus goes into the IEEE CS's general fund.

3.1.10 IEEE Access to Conference Bank Accounts

If the IEEE CS is a sponsor or co-sponsor, the IEEE Staff Director of Finance Services, or his/her designee, or an executive of one of the co-sponsors, if any, must have independent access to all bank accounts. If the above is not possible, a Fiscal Agent MOU is required.

4 Hotel & Exhibit Contracts

The IEEE CS utilizes IEEE standard hotel contract templates that include pre-negotiated standardized contractual clauses to help streamline negotiations with most major hotel chains and are particularly useful for IEEE Regions 1-7, but may also be useful when opening negotiations with hotels and venues in IEEE Regions 8-10.

Please contact your Conference Planner and send all contracts/agreements for the submission to IEEE Legal review and approval. All contracts with a total aggregate value greater than \$5,000 should be sent to the Legal and Compliance staff for review. Contracts include, but are not limited to, agreements, terms & conditions, SOWs, quotes, invoices with legal terms, ordering forms, etc.

If a contract is \$5,000 or below, it does not require legal review or approval. However, if subsequently the contract is increased and the total value becomes greater than \$5,000, legal review must be obtained.

Please reference the IEEE Finance Operations Manual, Section 8:

https://www.ieee.org/documents/financial_ops_manual.pdf

5 Copyrights

If a conference is 100% sponsored by the IEEE CS, or the IEEE CS and another IEEE society, IEEE must hold the copyright to the proceedings. Organizers for conferences with less than full (100%) IEEE sponsorship are encouraged to have IEEE hold the copyright.

5.1.1 Conference Publishing and Intellectual Property

Conferences with peer-reviewed papers (intellectual property or IP) are required to offer the papers for inclusion in the CS Digital Library (CSDL) and the IEEE Electronic Library called IEEE Xplore (IEL). This is handled automatically when publishing through IEEE-CS Conference Publishing Services (CPS). For conferences without peer-reviewed IP in Xplore, a fee may be instituted to cover lack of IP revenues.

6 Conference Titles and Naming Conventions

Rules and policies have been established regarding conference titles. Consistency in naming is essential for reference, publications, and help in branding your event.

1. Whenever a technical conference is sponsored solely by an IEEE entity or entities, “IEEE” must be used in the title.
2. “International” may be used in the title of the conference only when the conference will reflect an international character to a significant degree. Ordinarily this would require an active participation of the technical program committee of members from at least two nations, and a reasonable expectation that the technical program will include a significant number of papers from at least one other nation.
3. The word “national” may not be used in the title of an IEEE-sponsored meeting.
4. After a conference has been approved with a given title, only that title may be used. The Vice President of the Technical & Conference Activities Board must approve subsequent title or subtitle changes.
5. Title format should follow this schema:
 - › Year (4 digits)
 - › IEEE (as applicable)
 - › Sequence Number (as applicable)
 - › International (if conference reflects a significant degree of international character)
 - › Remainder of Title
 - › Acronym

Examples:

- › 2017 IEEE International Conference on Requirements Engineering (RE'17)
- › 2017 IEEE 23rd International Conference on Data Engineering
- › 2011 41st International Symposium on Computer Architecture
- › COMPSAC 2017 (acronym)

7 Managing the Conference Finances

Managing a conference's finances effectively is essential to the success of the conference. For further information or specific questions, please contact your Conference Planner.

7.1 Advance Loans

An advance loan may be requested to cover expenses paid (up to 15% of technical meeting expenses) before registration income is available. Loans are given after the approval of Part 2- Budget Approval of a conference. The amount of the advance requested from each sponsor should be proportional to the percentage of a sponsor's financial commitment. Requests for advance loans should be included in the budgeting process. Upon budget approval, the advance loan will be processed and deposited into the IEEE Conference Concentration Bank account our University account. IEEE CS policy requires advance loans to be repaid within 30 days after the conference or sooner.

7.2 Conference Bank Accounts

All IEEE Computer Society conference bank accounts must have the signatures of at least two volunteers and an IEEE Computer Society staff representative, except as prohibited under local government regulations, in which case a monthly detailed bank account statement must be provided to the IEEE Computer Society. All conferences must disclose all bank accounts they are using in order to obtain IEEE Computer Society sponsorship approval.

The IEEE offers a Concentration Banking Account, which is a checking account that allows unlimited check writing with no per check charges that does not levy monthly service fees and pays a higher interest rate than traditional business checking accounts. Interest is payable from day of deposit to day of withdrawal. You can access and download monthly Concentration Banking statements online. For more information about the IEEE Concentration Banking account, please visit:

http://www.ieee.org/membership_services/services/financial/treasury/concentration.html

7.3 Conference Audit

IEEE policy states that a financial audit is required where the sponsorship of the IEEE CS or a combination of IEEE entities is more than 50%, and the budgeted expenses exceed \$250,000 USD for the IEEE's combined share of sponsorship. Further to this policy, the IEEE CS reserves the right to require an audit --- to be performed by an independent, professional source, or the IEEE Operations Audit Department (OA) --- for any conference the IEEE CS sponsors. See: http://www.ieee.org/conferences_events/conferences/organizers/audit.html

When an audit is required, the conference may choose to use the IEEE Operations Audit Department, or an independent professional auditor.

7.4 Distribution of Funds

Distribution of surplus or payment of loss will be the responsibility of all financial co-sponsors based on the percentage of sponsorship as represented in the Co-Sponsorship MOU. If there is a financial loss the loss will be distributed accordingly, 1/3 by CS, 1/3 by the sponsoring TC(s) and a 1/3 by the conference.

7.5 Maintaining Expenditure Records/Receipts

All expenses must be approved by either the Finance and/or the General Chair. Any expense submitted to the Finance Chair for payment must have a sufficient invoice (sequence number, vendor name, address, phone, email, description, quantity, unit price, total price per item, subtotal, tax, discount, etc.) The receipt for a reimbursement (required for expenses over \$25.00) and copies must be kept on file by the conference for subsequent internal or external audit. Deferred payment can be used for invoices submitted by the IEEE CS for services performed, though the society will expect payment one month after the meeting. Examples include invoices for Advertising in Computer Society Periodicals, such as Computer and CPS invoices for Proceedings.

7.6 **Closing the Conference**

The Finance Chair is responsible for preparing and submitting a Final Report no later than 9 months after the meeting.

The following documents must be submitted directly to the Sr. Business Analyst, MomokoVanna mvanna@ieee.org

- Return of the Advance Loan funds (within 30 days of conference conclusion)
- Return of the Admin Fee and Surplus
- Submission of the Final Report defined as the entry and balancing of all “actual” income and expenses in the appropriate cells within the Budget.
- Proof of Bank Closure
- Certification of Accuracy
- 1099 and/or 1042 Report
- Tax Compliance Documents (typically where VAT or GST filings have occurred)
- Concentration Banking Check Destroy Form (if applicable)
- Attendee List
- Performance of an audit/submission of audit materials if requested or required by IEEE Policy

We strongly recommend starting the conference closing process immediately upon conclusion of the conference, as timely submission of the Final Report yields the greatest benefit to future conference organizers and sponsoring TCs.

IMPORTANT: *The Final Report is due no later than nine (9) months after the meeting. Conferences closing after this deadline will negatively impact the sponsoring TC’s annual budget.*

Once the Final Report is reviewed by the IEEE CS, the conference will receive an invoice for the total amount due to the IEEE CS (CS administrative fee, surplus).

8 **IEEE Insurance Information**

The following summary of insurance coverage relates specifically to IEEE-sponsored and co-sponsored conferences and not for other activities of IEEE. The summary provides basic information regarding insurance coverage that is applicable to IEEE conferences.

https://www.ieee.org/about/volunteers/risk_insurance/conference_insurance.html

8.1 **Conference Insurance Program Summary**

The following insurance applies to conferences that are financially sponsored and co-sponsored by IEEE and approved by IEEE Conference Services:

Liability Insurance

- IEEE maintains Commercial General Liability (CGL) insurance to protect IEEE in the event a claim is made against IEEE and/or its Volunteers. The CGL insurance provides coverage for third-party bodily injury and property damage.
- IEEE Volunteers are included on IEEE’s insurance policies and protected while acting within the scope of their duly authorized duties as Conference Officers or Committee Members for the duration of the conference and its activities.
- To the extent permitted by law, IEEE shall indemnify each person who serves as a duly authorized Volunteer of a duly authorized IEEE activity pursuant to IEEE Bylaw I-300.3 Indemnification.

- The Conference must maintain a record of all Officers and Committee Members who are actively engaged in the management of the conference. This record ensures that coverage is afforded to the appropriate Volunteers acting on behalf of the conference.
- In addition to the primary CGL insurance coverage, IEEE maintains Umbrella Liability coverage that provides additional limits of liability coverage.
- Conferences utilizing a transportation service provider (e.g. Boat cruise, Bus tour, other) should obtain evidence of insurance coverage from the service provider. IEEE should be named as an additional insured. IEEE's liability insurance coverage does not apply to charters. For additional information, please contact ORIMS@ieee.org.

Property on Exhibition Insurance

- IEEE maintains property insurance for theft of or damage to equipment (e.g., audio visual, laptops, etc.) that is leased or borrowed by the conference. Please note that policy limits and deductibles vary depending on location of the conference.

Inside the USA, Canada, & US Territories	Outside the USA, Canada, & US Territories
Limit: US\$500,000	Limit: US\$200,000
Deductible: US\$10,000	Deductible: US\$1,000

Business Crime Insurance (also referred to as Fidelity Bonding)

- IEEE maintains Business Crime insurance that protects IEEE in the event of loss due to fraudulent acts (e.g., theft of conference funds) committed by staff or Volunteers.
- The IEEE Business Crime insurance does not provide coverage for theft of IEEE funds by third-party registration service providers.

8.2 Event cancellation insurance

Effective October 2013, all approved IEEE conferences that are 100% financially sponsored by IEEE are automatically covered by an event cancellation insurance policy. For a conference to qualify for coverage under the IEEE Event Cancellation Insurance Policy, the following conditions MUST be met:

1. The conference must be 100% financially sponsored by one or more IEEE Society and/or organizational unit.
2. The conference must be approved by IEEE and included in the IEEE Conference Database.
3. A detailed conference budget MUST be submitted and included in the IEEE Conference Database.

The Event Cancellation Insurance protects the conferences from lost revenue and/or additional expenses incurred because of an unforeseen cancellation, postponement, or curtailment of an event. Examples of such disruptions might include natural disasters (hurricanes, tornadoes, blizzards, etc.), fire or flood damage to a venue, airline or hotel staff strikes, and other unforeseen causes of event cancellation.

All other conferences (not wholly owned by IEEE) continue to have the option to purchase individual Event Cancellation Insurance policies. To take advantage of the program IEEE has negotiated, please submit a completed [Event Cancellation Insurance application](#) (PDF, 677 KB) and a copy of the conference budget to ORIMS@ieee.org.

Please review the [IEEE Event Cancellation Insurance FAQs](#) (PDF, 99 KB).

8.3 Conference venue certificates of insurance

Certificates of insurance that are required by the conference venue are available upon request. They must be prepared by IEEE's insurance broker and should be requested 30-60 days in advance of the conference.

To obtain a current certificate of insurance, submit a [completed certificate request form](#) (DOC, 67 KB) to ieeeinsurance@ieee.org. Please include a copy of the venue's insurance requirements.

8.4 Conference insurance claims

Thefts must first be reported to hotel/venue security and local authorities. IEEE is required to provide prompt notice to its insurance company of any possible insurance claim.

If a loss (e.g., theft, property damage, bodily injury) occurs at an IEEE Conference, or an incident takes place which may reasonably give rise to legal action, please contact the Office of Risk and Insurance Management Services immediately at +1 732 562 5541 or ORIMS@ieee.org.

8.5 Frequently Asked Questions (FAQs)

Q. Does an IEEE Conference need to specifically request the liability insurance coverage?

A. No, IEEE insurance is automatically provided to IEEE financially sponsored and co-sponsored conferences that have been approved by IEEE Conference Services.

Q. Does the Conference receive confirmation that the IEEE liability insurance applies to its activities?

A. Yes, a letter confirming coverage is distributed to the Conference once Conference Services has provided notification that the Conference has been approved by IEEE.

Q. What does the IEEE Liability insurance cost?

A. The IEEE liability insurance is provided at no direct cost to the conference.

Q. What if IEEE is co-sponsoring the conference with a non-IEEE entity?

A. In the case of a co-sponsored conference, IEEE maintains liability insurance to cover potential liability that could arise from its participation in the conference. IEEE should obtain certificates of insurance from the non-IEEE financial co-sponsors indicating what types and limits of insurance coverage each maintains. If a loss were to occur, the non-IEEE entity may be liable for a portion of the loss. IEEE does not include non-IEEE organizations on its insurance policies.

Q. Does the conference need to do anything regarding insurance if it is hiring a third-party service provider such as a transportation company (shuttle buses), a caterer, or other?

A. Yes, IEEE should obtain certificates of insurance from the service provider evidencing their liability insurance coverage. The certificate should list IEEE as an additional insured.

Q. Who should I contact for more information regarding IEEE Conference Insurance?

A. Contact the IEEE Office of Risk and Insurance Management Services at +1 732 562 5541 or orims@ieee.org.

Q. Where can/should I archive my Committee List?

A. If you submitted your Committee List in conjunction with your Conference Application, then no additional action is required. If you didn't, or have made updates since the original version, please e-mail a new copy to ieee-mce@ieee.org.

9 IRS, GST, and VAT Tax Considerations

Please see https://www.ieee.org/about/volunteers/tax-administration/vat_gst_info.html

9.1 IRS Employer Identification Number

The Uniform Employer Identification Number assigned to the Institute of Electrical and Electronics Engineers, Inc. is 13-1656633. A conference uses this number as the taxpayer identification number in accordance with Section 6109 of the 1954 Internal Revenue Code.

9.2 Sales Tax Exemption

As an organization exempt from U.S. income taxes under Section 501(c)(3) of the Internal Revenue Code, the IEEE has applied for sales tax exemptions in a number of states across the country. The 501(c)(3) tax status is beneficial for a number of reasons. It allows for possible exemption from various state sales and use taxes for which 501(c)(6) organizations are not eligible; it also provides additional protection for the IEEE's nonprofit postal permit and benefits the IEEE and its societies by allowing individuals to make tax deductible contributions.

Those states in which the IEEE has received sales tax exemption include: Colorado, Florida, Maryland, Massachusetts, Michigan, Missouri, New Jersey, New Mexico, New York, Texas, Utah, Vermont, and Wisconsin. The District of Columbia has also granted sales tax exemption. To obtain copies of state sales tax certificates, please contact your Conference Planner, or see <http://www.ieee.org/about/volunteers/tax-administration/exemptions.html>. Best practice recommends that organizers locate their conference where IEEE has received the sales tax exemption. You will be able to lower registration fees or offer additional services or return a greater surplus to the sponsoring organizations resulting in a higher allocation to the TC or STC. In many but not all cases these states offer lower food and beverage and hotel sleeping room rates.

To avoid sales and use tax charges, an exempt organization permit must be submitted to the vendor before purchases; some vendors will accept the IRS letter of exemption in place of the permit. If the vendor does not accept the IRS letter, the tax must be paid, but once the permit is obtained, a refund request can be filed.

For additional information, please email tax-compliance@ieee.org.

9.3 IRS Form 1099/1098/1042 for Reporting Honorarium Payments

The IEEE and its societies are required by U.S. tax law to report any income paid to U.S. citizens including honorarium payments to tutorial speakers. If the IEEE CS is at least a 50% cosponsor or more, please complete the [IEEE 1099/1098/1042 schedule of payments form](#), and submit to IEEE Conference Services (conference-finance@ieee.org). This payment amount should not include travel expenses, only honorarium. This information must be collected by year-end and reported at the beginning of January for conferences of the preceding year, and it must be reported regardless of where the conference was held. It is recommended that you obtain a copy of the passport or government issued photo ID and make a notation of current address if appropriate.

9.4 Value Added Tax/Goods and Services Tax (VAT/GST)

Special considerations will need to be addressed when planning a non-US meeting. Please refer to the IEEE Services page which provides additional detail to assist the conference committee (http://www.ieee.org/about/volunteers/tax-administration/vat_gst_info.html).

VAT (Value Added Tax) and GST (Goods and Services Tax) are typically non-U.S. consumption taxes imposed on sales of goods by businesses at each stage of production and distribution, and on sales of services as they are rendered. Sales of services include registration, tutorial, workshop, and exhibitor fees. For purposes of the VAT or GST tax, the term "business" includes any activity carried on, whether for-profit or not-for-profit, that involves or is intended to involve the sale of property or services.

10 Conference Publishing Services (CPS)

The IEEE CS's *Conference Publishing Services* (CPS) produces high-quality, peer-reviewed conference publications in print, digital and online products. Our goal is to make the publishing process as effortless as possible for both organizers and authors.

Publishing with the IEEE CS's *Conference Publishing Services* (CPS) provides you with:

- Professional support throughout the total publishing process
- High-quality production and printing services
- Efficient scheduling and on-time delivery
- Professional marketing
- Indexing services
- Library subscription plans (CSLSP, CSPSP, SSP)
- Digital libraries (CSDL, IEEE Xplore, IEEE IEL)
- Post-conference sales
- IEEE and IEEE CS Branding
- Copyright/Liability protection

Conferences can receive a quote by going to www.computer.org/cps, or contacting cps@computer.org.

10.1 Taking Care of Your Conference: Experienced and Professional Editors

The CPS editors are here to make sure the publishing process runs smoothly. They will take care of the details so that you can focus on the big picture. Editors provide full communication and assistance to both authors and organizers throughout the publication process. They act as the conference organizer's liaison to the authors, taking on the day-to-day hassles that come with collecting numerous files and conference all deadlines.

10.2 CPS Online™: All You Need, Anytime You Need It

CPS Online™ is the IEEE Computer Society's online collaborative conference publishing system, which is a web-based project management tool, and provides real-time online access to the status of each project.

CPS Online™

- Speeds the delivery of publishing quotes, including up to six variations in page count, quantity and media type
- Provides the conference's "Primary Contact" person with real-time internet access to all the project's publication materials during production, including final submitted papers
- Gives conference organizers and authors the opportunity to upload files through any Web browser
- Check scheduling on a project
- Make changes to the Table of Contents and Front Matter
- Approve editorial changes and proofs
- Communicate with the CPS editor through discussion forums, chat tools, commenting tools and e-mail
- Access to "Author's Final Paper Formatting and Submission Instructions" Webpage (Online Author Kit) for collection of accepted papers, copyright forms and metadata information
- Access to IEEE PDF eXpress™, the online source file conversion / PDF validation tool that assists in the creation of IEEE-Xplore™ compliant PDF files for final submission

10.3 Preprint Assessment

CPS has trained staff that will take care of any errors on submitted PDF files. Papers submitted through the Online Author Kit are all put through a rigorous Quality Control process so that they are both print and Xplore™ compliant.

10.4 The CSDL and Xplore™

CPS prides itself on the timely posting of conference media to the CSDL and Xplore™. Conference organizers and authors do not want to wait months for papers to appear in these digital libraries. CPS conference proceedings conference the current IEEE requirements for inclusion in Xplore will have the papers be posted to the CSDL and Xplore™ no later than 30 days after the close of the conference.

10.5 Indexing

CPS understands the importance of indexing to the long-term success of a conference. CPS arranges for indexing through INSPEC, EI (Compendex), Thomson ISI, and other indexing services.

10.6 Reprints

If you wish to order reprints of your paper, please go to the Publications Reprints web page (<http://www.computer.org/portal/web/cscps/submission#reprints>) and fill out the conference proceedings reprint order form.

10.7 Sweating the Details: Paperwork

CPS editors make sure all of the necessary paperwork is filed and that the conference has all of the necessary information for inclusion in the CSDL, IEEE Xplore™, and indexing.

CPS obtains:

- All required copyrights
- Library of Congress/ISSN
- ISBN and other bibliographical registration details

All of the author papers in your publication will have a Digital Object Identification Number (DOI), allowing for easy searches and protection against plagiarism.

10.8 Protecting the Integrity of a Conference: No-shows

CPS understands how important the perception of a conference is to the organizers, authors, and community in which that conference resides. This is why any conference published by CPS has the protection of the IEEE No-show policy. If a presenter does not attend a conference without legitimate reason, the conference organizer has the right to pull his or her paper from final posting to the CSDL, Xplore™, and indexing. This gives organizers another tool to protect their conference and to make sure it never picks up the reputation as a paper mill event.

10.9 Content Delivered: Shipping

All the work that goes into creating a conference publication can be undone by one simple word: Customs. CPS recognizes the importance of staying on top of shipping and works extensively with international shipping representatives to make sure conference media is delivered on time, every time.

10.10 Looking Good on the Outside: Cover Art and CD Design

CPS has highly skilled graphic artists on staff to make sure your conference publication looks as professional as the work inside. They will work with the editor and conference organizer to give each conference a unique look for all media types. To save conferences money in these economic times, there is no additional charge for 4-color cover art.

11 Committees

11.1 Steering Committees

Steering committees provide continuity of leadership for annual meetings and steering charter's offer guidance to future committees, particularly if several sponsors are involved.

The steering committee is responsible for the general oversight of and setting policy for a meeting. The membership of the steering committee usually remains unchanged or relatively unchanged over a period of several years, usually three. The steering committee is normally responsible for making the major strategic decisions, namely, the appointment of the General Chair, selection of dates and locations, major theme, and coordination among the sponsors. In addition, the steering committee may review and approve the budget before it is sent to the sponsors. The steering committee typically meets one to three times a year. Although it is

desirable to have a separate steering committee, it is not essential; some meetings have successfully combined the steering and conference committees into one group.

11.1.1 CS Participation on Conference Steering Committees

For CS-sponsored or co-sponsored meetings, the Sponsoring TC Chair or designee shall be an ex officio voting member of the Conference Steering Committee.

11.1.2 Steering Committee Charters

The IEEE CS's Periodic meetings (meetings held no more than two years apart) shall have a steering committee and a steering committee charter. *The charter shall include the conference scope, committee membership, sponsor(s) financial commitment, and procedures for amendment, withdrawal, and termination. Steering committee charters for meetings with expense budgets that exceed two percent of the IEEE CS's annual expense budget require the Board of Governors' approval. All other steering committee charters require approval by the Technical & Conference Activities Board. Meetings that are sponsored by a technical committee need technical committee approval for the initial steering committee charter and any subsequent changes.* A steering committee charter template is available through your assigned Conference Planner.

11.2 Organizing Committee

Each instance of a conference is planned and executed under the direction of the Organizing Committee. This committee plays a direct role in the meeting. Whereas the Steering Committee provides longevity and strategic planning, the Organizing Committee provides the hands on tactical planning and running of the meeting.

The following describe the common roles of the Conference Organizing Committee:

General Chair

Responsible for all aspects of the conference and is accountable to the steering committee and the sponsors with respect to the discharge of that responsibility.

- Submit IEEE's required Principles of Business Conduct and Conflict of Interest form:
<http://www.ieee.org/about/corporate/compliance/index.html>

Finance Chair (see the Section on "Finances")

Responsible for all of the financial aspects of the meeting:

- Prepares and monitors budget;
- Opens and closes any bank accounts and credit cards before the conference is closed;
- Approves expenditures;
- Insures that the conference achieves the 20% CS Administration Fee;
- Maintains proper financial records;
- Sees that the approved registration fees are charged;
- Prepares the Final Report;
- Requests an audit if required by IEEE Policy
- Submit IEEE's required Principles of Business Conduct and Conflict of Interest:
<http://www.ieee.org/about/corporate/compliance/index.html>

Program Chair

Responsible for the program committee:

- Plans the technical program and Call For Papers (CFP);
- Invites speakers;
- Establishes paper reviews or referee procedures;
- Organizes the technical sessions.

Tutorials Chair

Responsible for the tutorials program:

- Selects speakers and coordinates speaker arrangements;
- Prepares tutorial contracts;
- Oversees printing of tutorial notes
- Requests payment of speaker fees and travel expenses.

Exhibits Chair

Responsible for making exhibit arrangements:

- Creates the Exhibit Contract and has it reviewed by assigned Conference Planner;
- Solicits, sends contracts to exhibitors;
- Completes exhibit space layout;
- Obtains bids from exhibit service contractors;
- Manages on-site exhibits.

Publicity Chair

Responsible for all aspects of publicity:

- Prepares and distributes call for papers, advance program, final program;
- Places magazine advertisements
- Prepares and distributes Announcement(s) using Sponsoring TC(s) and previous conferences email addresses.

Registration Chair

Responsible for registration procedures:

- Collects registration money and provides reports to the Finance Chair;
- Manages on-site registration;
- Provides an attendee list to the IEEE CS after the meeting.

Local Arrangements Chair

Responsible for conference arrangements at the conference location:

- Manages all hotel or facility arrangements, including meeting space assignments and food and beverage functions;
- Handles audio-visual equipment requirements unless there is an audio-visual Chair;
- Can negotiate but cannot sign the hotel contract (all hotel contracts must be sent to your assigned Conference Planner and be signed by the IEEE Director of Strategic Sourcing.

Publications Chair

Responsible for overseeing proceedings production:

- Determines publisher for production of proceedings;
- Communicates with author(s) concerning text preparation and deadlines;
- Obtains signed IEEE Copyright form from each author / speaker if not automatically collected during the paper submission and peer-review and acceptance process.

11.3 The Program Committee

11.3.1 Responsibilities

The primary objective of the Program Committee (PC) 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. The primary duties are as follows:

- Select a Program Committee

- Prepare the Call for Papers
- Receive and track submitted papers
- Review papers for presentation
- Select papers to be presented
- Organize sessions and select session chairs
- Determine conference schedule
- Correspond with authors on acceptance/rejection
- Determine content of author kits, including page limits
- Make room assignments with Local Arrangements Committee
- Work with Publications Committee on Advance Program
- Work with Publications Committee on Conference Proceedings
- Provide instructions to speakers and session chairs
- Work with Publicity Committee on key content of program for publicity
- Work with Exhibits Committee to coordinate exhibits with program content
- Provide last-minute instructions to speakers and session Chairs at Speakers' Breakfast or other pre-conference activities.

The T&C Board will conduct random technical audits of the paper review process based on the technical audit procedures approved by the T&C Board.

11.4 IEEE CS Sponsoring Technical Committees and Councils (TCs)

IEEE CS Technical Committees and Councils (TCs) are networks of professionals with common interests in computer hardware, software, applications, and interdisciplinary fields. TCs directly influence society standards, publications, conferences, workshops, education, and chapter activities. They serve as the focal point for the society's activities within a technical discipline. Activities typically include organizing workshops, symposia, and technical sessions at IEEE CS conferences.

TCs make critical contributions to IEEE CS meetings. TCs initiate new meetings and foster and support ongoing meetings. TC members typically serve on program and conference committees to ensure the technical quality of the meetings. *In addition, for CS-Sponsored or Co-Sponsored meetings, the Sponsoring TC Chair or designate must be an ex officio voting member of the Conference Steering Committee.*

The TC Chair coordinates all sponsored, co-sponsored, and technically co-sponsored conferences, symposia, and workshops. The Chair actively encourages the creation and organization of new conferences as well as ensures the success of existing conferences. The TC Chair is responsible for the overall administration of the technical committee. This includes providing technical direction and leadership. The Chair maintains the vitality of the committee by coordinating activities such as conferences, standards, newsletters, etc.

TC Chairs also serve an important role in reviewing budgets that are sponsored by the technical committee, and reviewing technical quality of applications for technical co-sponsorship.

For more information and a list of all Technical Councils, Committees, and Task Forces please see our [website](#).

11.4 IEEE Regions and Sections

The IEEE CS encourages conference organizers to cooperate with the IEEE Regions and Sections in planning a technical meeting; they can be particularly helpful in local arrangements. IEEE Regional Directors should receive information on, and invitations to, technical meetings taking place in their regions. Information on the Regional Directors is available from IEEE:

http://www.ieee.org/societies_communities/geo_activities/regional_world_map.html. IEEE Regions and Sections should be invited to participate in IEEE CS technical meetings.

