

How to organize an IEEE Conference: Checklist & Timeline

- Detailed Conference Checklist (Pages 1-13)
- *At a Glance* Conference Timeline

Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services Bold = Required		<input checked="" type="checkbox"/> Detailed Conference Checklist			
<input checked="" type="checkbox"/>	WHEN actions/tasks should be completed (Recommended Deadlines)	WHAT actions/tasks need to be done	HOW to complete (Required Docs/Templates)	WHERE can I go to access forms, get more information, reference materials and policy?	WHO can I contact if I have questions?
	START	Determine and apply for sponsorship from all applicable IEEE and/or non-IEEE organizational units (OU)		<ul style="list-style-type: none"> • IEEE Societies, Councils and Technical Communities http://www.ieee.org/web/societies/home/index.html • IEEE Geographic Activities (Regions/Sections/Chapters) http://www.ieee.org/web/geo_activities/home/index.html • Policy 10.1.2 - Sponsorship http://www.ieee.org/web/aboutus/whatis/policies/p10-1.2.xml#10.1.2 • Conferences Organization Manual - 2.0 Types of Conference Involvement http://www.ieee.org/web/conferences/mom/mom_sect2.html 	IEEE Conference Business Services
	24 months BEFORE start date	Obtain sponsorship		<ul style="list-style-type: none"> • Policy 10.1.3 - Inter-organizational Unit Roles & Responsibilities http://www.ieee.org/web/aboutus/whatis/policies/p10-1.3.xml#10.1.3 • Policy 10.1.4 - General Approvals, Endorsements, & Notifications http://www.ieee.org/web/aboutus/whatis/policies/p10-1.4.xml#10.1.4 	IEEE organizational unit (OU) you are seeking sponsorship from
	24-18 months BEFORE start date	Appoint General Chair and Conference Committee		<ul style="list-style-type: none"> • Policy 10.1.12 - Conference Chairs http://www.ieee.org/web/aboutus/whatis/policies/p10-1.11.12.13.14.15.xml#10.1.12 • Conferences Organization Manual - 4.0 Organizing, Planning and Scheduling the Conference http://www.ieee.org/web/conferences/mom/mom_sect4.html • Conferences Organization Manual - Sections 6.0-13.0 http://www.ieee.org/web/conferences/mom/table_of_contents.html 	IEEE organizational unit (OU) you obtained sponsorship from
	24-18 months BEFORE start date	Contact the local IEEE Section of where the conference will be held		<ul style="list-style-type: none"> • IEEE Geographic Activities (Regions/Sections/Chapters) http://www.ieee.org/web/geo_activities/home/index.html 	IEEE Conference Business Services

Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services Bold = Required			<input checked="" type="checkbox"/> Detailed Conference Checklist		
<input checked="" type="checkbox"/>	WHEN actions/tasks should be completed (Recommended Deadlines)	WHAT actions/tasks need to be done	HOW to complete (Required Docs/Templates)	WHERE can I go to access forms, get more information, reference materials and policy?	WHO can I contact if I have questions?
	24-18 months BEFORE start date <i>As soon as feasible - but no later than 18 months before the conference</i>	Register your conference with the IEEE, submit the Conference Information Schedule & Committee List to obtain a conference number, insurance coverage and be listed on the IEEE Conference Search and Call for Papers (CFP) listing. <i>Preliminary conference information you provide can always be updated. If you have any changes or updates, please contact us at conference- services@ieee.org</i>	Conference Information Schedule & Committee List	<ul style="list-style-type: none"> • IEEE Conference Information Schedule http://www.ieee.org/web/conferences/organizers/required_documentation.html • Policy 10.1.4 - General Approvals, Endorsements, & Notifications http://www.ieee.org/web/aboutus/whatis/policies/p10-1.4.xml#10.1.4 	IEEE Conference Business Services
				<ul style="list-style-type: none"> • Conference Insurance Information http://www.ieee.org/web/conferences/organizers/insurance_info.html • Policy 10.1.19 - Conference Insurance http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.19 	IEEE Insurance
	24-18 months BEFORE start date	Set forth the relationship and obligations of all involved parties in a Memorandum of Understanding (MOU) , if applicable	Memorandum of Understanding (MOU) , if applicable	<ul style="list-style-type: none"> • Memorandum of Understanding (MOU) http://www.ieee.org/web/conferences/organizers/MOU.html • Policy 10.1.5 - Memorandum of Understanding/Agreement (MoU/MoA) http://www.ieee.org/web/aboutus/whatis/policies/p10-1.5.xml#10.1.5 	IEEE Conference Contracts
	24-18 months BEFORE start date	Contract conference management company, if applicable for site selection, registration management, conference logistics or exhibit management All conference contracts with a value of US \$25,000 or greater must be reviewed by the IEEE Conference Contracts Dept. Conference contracts less than US \$25,000 will be reviewed upon request.	Meeting Management Template , if applicable	<ul style="list-style-type: none"> • Templates of Contracts and Legal Documents http://www.ieee.org/web/conferences/organizers/contracts.html • Policy 10.1.18 - Contracting http://www.ieee.org/web/aboutus/whatis/policies/p10-1.16.17.18.xml#10.1.18 	IEEE Conference Contracts
	24-18 months BEFORE start date	Select site and prepare contract with conference facility/venue and hotels All conference contracts with a value of US \$25,000 or greater must be reviewed by the IEEE Conference Contracts Dept. Conference contracts less than US \$25,000 will be reviewed upon request.	Contracts (Facility/Venue) , if applicable	<ul style="list-style-type: none"> • Templates of Contracts and Legal Documents http://www.ieee.org/web/conferences/organizers/contracts.html • Policy 10.1.18 - Contracting http://www.ieee.org/web/aboutus/whatis/policies/p10-1.16.17.18.xml#10.1.18 • Conferences Organization Manual - 5.0 Site Selection and Hotel Contracts http://www.ieee.org/web/conferences/mom/all_manual.html#sectoct_5_0 • Conferences Organization Manual - 12.0 The Local Arrangements Committee http://www.ieee.org/web/conferences/mom/sectoct_12.html 	IEEE Conference Contracts

Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services Bold = Required			<input checked="" type="checkbox"/> Detailed Conference Checklist		
<input checked="" type="checkbox"/>	WHEN actions/tasks should be completed (Recommended Deadlines)	WHAT actions/tasks need to be done	HOW to complete (Required Docs/Templates)	WHERE can I go to access forms, get more information, reference materials and policy?	WHO can I contact if I have questions?
	24-18 months BEFORE start date	Review IEEE Insurance coverage and determine if additional coverage is required		<ul style="list-style-type: none"> • Conference Insurance Information http://www.ieee.org/web/conferences/organizers/insurance_info.html • Policy 10.1.19 - Conference Insurance http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.19 • Conferences Organization Manual - 9.0 The Finance Committee http://www.ieee.org/web/conferences/mom/sectoct_9.html 	IEEE Insurance
	24-18 months BEFORE start date	Review tax information to ensure Internal Revenue Service (IRS) and international compliance-VAT (Value Added Tax) and GST (Goods and Services Tax)	If VAT related, please contact Lucia Servus at conference-finance@ieee.org	<ul style="list-style-type: none"> • Tax Information for IEEE Conferences http://www.ieee.org/portal/pages/services/financial/tax/ieeeconftaxinfo.html • Policy 10.1.22 - Tax Liability http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.22 • Conferences Organization Manual - 9.0 The Finance Committee http://www.ieee.org/web/conferences/mom/all_manual.html#sectoct_9_0 	IEEE Conference Finance Lucia Servus, VAT Analyst IEEE Tax Compliance & Administration
	18-15 months BEFORE start date	Develop communications plan, marketing materials and conference website		<ul style="list-style-type: none"> • IEEE Publicity Guide http://www.ieee.org/portal/pages/newsinfo/IEEE_Publicity_Guide.html • IEEE Entity Web Hosting http://www.ewh.ieee.org/ • IEEE Identity Standards (IEEE Master Brand Usage) http://www.ieee.org/web/publications/rights/idstandards.html • Policy 10.1.16 - Naming of IEEE Conferences http://www.ieee.org/web/aboutus/whatis/policies/p10-1.16.17.18.xml#10.1.16 • Policy 10.1.17 - Use of the IEEE Logo http://www.ieee.org/web/aboutus/whatis/policies/p10-1.16.17.18.xml#10.1.17 • Policy 10.1.21 - IEEE Services and Publicity http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.20 • Conferences Organization Manual - 8.0 The Publicity and Public Relations Committee http://www.ieee.org/web/conferences/mom/sectoct_8.html 	IEEE Conference Business Services IEEE Intellectual Property Rights
	18-15 months BEFORE start date	Send request for proposal (RFP) to exhibit decorators and develop exhibitor prospectus, if applicable		<ul style="list-style-type: none"> • Conferences Organization Manual - 11.0 The Exhibits Committee http://www.ieee.org/web/conferences/mom/sectoct_11.html 	Previous year's conference committee
	18-15 months BEFORE start date	Begin outreach to educational institutions, corporations, government and industry for support and patronage		<ul style="list-style-type: none"> • Policy 10.1.23 - Financial Support from Industry http://www.ieee.org/web/aboutus/whatis/policies/p10-1.23.24.25.xml#10.1.23 • Conferences Organization Manual - Sections 7.0, 8.0 and 11.0 http://www.ieee.org/web/conferences/mom/all_manual.html 	Previous year's conference committee

Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services Bold = Required			<input checked="" type="checkbox"/> Detailed Conference Checklist		
<input checked="" type="checkbox"/>	WHEN actions/tasks should be completed (Recommended Deadlines)	WHAT actions/tasks need to be done	HOW to complete (Required Docs/Templates)	WHERE can I go to access forms, get more information, reference materials and policy?	WHO can I contact if I have questions?
	18-15 months BEFORE start date	Apply for grants for conference support		<ul style="list-style-type: none"> • IEEE Grant Administration http://www.ieee.org/portal/pages/services/financial/grants/index.html • Conferences Organization Manual - 9.0 The Finance Committee http://www.ieee.org/web/conferences/mom/all_manual.html#sectoct_9_0 	IEEE Development Office
	15-12 months BEFORE start date	Develop process/identify system for paper management		<ul style="list-style-type: none"> • Policy 10.1.13 - Confidentiality http://www.ieee.org/web/aboutus/whatis/policies/p10-1.11.12.13.14.15.xml#10.1.13 • Policy 10.1.20 - Conference Publications http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.20 • Conferences Organization Manual - 7.0 The Publications Committee http://www.ieee.org/web/conferences/mom/sectoct_7.html 	Previous year's conference committee
	15-12 months BEFORE start date	Develop technical program by determining topic areas, format and types of technical papers. Establish abstract submission, author notification and final paper submission deadlines.		<ul style="list-style-type: none"> • Conferences Organization Manual - 6.0 The Program Committee http://www.ieee.org/web/conferences/mom/sectoct_6.html • Conferences Organization Manual - 7.0 The Publications Committee http://www.ieee.org/web/conferences/mom/sectoct_7.html 	Previous year's conference committee
	15-12 months BEFORE start date	Establish a Call for Papers (CFP)		<ul style="list-style-type: none"> • Conferences Organization Manual - 6.0 The Program Committee http://www.ieee.org/web/conferences/mom/sectoct_6.html • Conferences Organization Manual - 7.0 The Publications Committee http://www.ieee.org/web/conferences/mom/sectoct_7.html 	Previous year's conference committee
	15-12 months BEFORE start date	Update conference website with a page/link about CFP information		<ul style="list-style-type: none"> • Policy 10.1.13 - Confidentiality http://www.ieee.org/web/aboutus/whatis/policies/p10-1.11.12.13.14.15.xml#10.1.13 • Policy 10.1.20 - Conference Publications http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.20 • Conferences Organization Manual - 7.0 The Publications Committee http://www.ieee.org/web/conferences/mom/sectoct_7.html 	Previous year's conference committee

<div> <div> Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services Bold = Required </div> <div> <input checked="" type="checkbox"/> Detailed Conference Checklist </div> </div>					
<input checked="" type="checkbox"/>	WHEN actions/tasks should be completed (Recommended Deadlines)	WHAT actions/tasks need to be done	HOW to complete (Required Docs/Templates)	WHERE can I go to access forms, get more information, reference materials and policy?	WHO can I contact if I have questions?
	15-12 months BEFORE start date	Establish a Visa process for international attendees and post on the conference website ** Visa processing times vary, encourage attendees to plan ahead.		<ul style="list-style-type: none"> • IEEE Conference Visa Request Process http://www.ieee.org/web/conferences/organizers/reference_materials.html • Conferences Organization Manual - 14.0 Transnational Participation 14.2.4 VISA Letters for Participants from Regions 7-10 http://www.ieee.org/web/conferences/mom/sectoct_14.html • U.S. Department of State Bureau of Consular Affairs http://travel.state.gov/ • United States Visas http://www.unitedstatesvisas.gov/ • Embassy's Consular Section http://www.usembassy.gov/ 	Previous year's conference committee
	15-12 months BEFORE start date <i>Earlier submission is strongly recommended</i>	Submit conference budget with written approvals from all IEEE financial sponsoring organizational unit(s) (OUs) for headquarter review	IEEE Financial Web Form - Budget with written approvals from all IEEE financial sponsoring organizational unit(s) (OUs)	<ul style="list-style-type: none"> • Select "IEEE Financial Web Form", Financial Report Type "Budget" http://www.ieee.org/web/conferences/organizers/required_documentation.html • Policy 10.1.6 - Conference Budgets http://www.ieee.org/web/aboutus/whatis/policies/p10-1.6.xml#10.1.6 • Conferences Organization Manual - 9.0 The Finance Committee http://www.ieee.org/web/conferences/mom/sectoct_9.html 	IEEE Conference Finance
	15-12 months BEFORE start date	General Chair and Finance Chair/Treasurer must complete and submit POBC/COI forms	Principles of Business Conduct Compliance Certificate and Conflict of Interest Disclosure Statement ((POBC/COI) <ul style="list-style-type: none"> • General Chair • Finance Chair/Treasurer 	<ul style="list-style-type: none"> • Principles of Business Conduct and Conflict of Interest http://www.ieee.org/web/volunteers/compliance/conflict_of_interest/index.html 	IEEE Conference Finance
	15-12 months BEFORE start date	Submit updated committee list, if applicable	E-mail to conference-finance@ieee.org		IEEE Conference Finance

Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services Bold = Required			<input checked="" type="checkbox"/> Detailed Conference Checklist		
<input checked="" type="checkbox"/>	WHEN actions/tasks should be completed (Recommended Deadlines)	WHAT actions/tasks need to be done	HOW to complete (Required Docs/Templates)	WHERE can I go to access forms, get more information, reference materials and policy?	WHO can I contact if I have questions?
	15-12 months BEFORE start date	Establish conference bank account for receipt and disbursement of conference funds	IEEE Concentration Banking	<ul style="list-style-type: none"> • IEEE Concentration Banking Program http://www.ieee.org/portal/pages/services/financial/treasury/concentration.html • Bank Accounts http://www.ieee.org/web/conferences/organizers/financial.xml#bank • Policy 10.1.8 - Conference Bank Account Signatures http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.8 • Conferences Organization Manual - 9.0 The Finance Committee http://www.ieee.org/web/conferences/mom/sectoct_9.html 	IEEE Conference Finance
			Bank Signature Cards [when local bank is being used]	<ul style="list-style-type: none"> • Bank Accounts http://www.ieee.org/web/conferences/organizers/financial.xml#bank • Policy 10.1.8 - Conference Bank Account Signatures http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.8 • Conferences Organization Manual - 9.0 The Finance Committee http://www.ieee.org/web/conferences/mom/sectoct_9.html 	IEEE Concentration Banking
			Fiscal Agent (Bank MOU) [for 3rd party ledger accounts]	<ul style="list-style-type: none"> • Fiscal Agent MOU (Formerly Banking MOU) http://www.ieee.org/web/conferences/organizers/MOU.html • Bank Accounts http://www.ieee.org/web/conferences/organizers/financial.xml#bank • Policy 10.1.8 - Conference Bank Account Signatures http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.8 • Conferences Organization Manual - 9.0 The Finance Committee http://www.ieee.org/web/conferences/mom/sectoct_9.html 	IEEE Conference Finance
	The sole sponsor and co-sponsoring organizational units may issue advances to their conferences anytime during its life cycle. **Up to the conference start date	Request and obtain loan from sponsoring organizational unit (OU), if needed		<ul style="list-style-type: none"> • Policy 10.1.7 - Conference Advances http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.7 • Conferences Organization Manual - 9.0 The Finance Committee http://www.ieee.org/web/conferences/mom/sectoct_9.html 	IEEE Conference Finance

<div> <div> Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services Bold = Required </div> <div> <input checked="" type="checkbox"/> Detailed Conference Checklist </div> </div>					
<input checked="" type="checkbox"/>	WHEN actions/tasks should be completed (Recommended Deadlines)	WHAT actions/tasks need to be done	HOW to complete (Required Docs/Templates)	WHERE can I go to access forms, get more information, reference materials and policy?	WHO can I contact if I have questions?
	Submit Pre- and Post-Conference forecasts by November 30th of each calendar year for accrual purposes.	Submit Pre- and Post-Conference forecasts		<ul style="list-style-type: none"> • Select "IEEE Financial Web Form", Financial Report Type "Pre-Conference forecast" and/or "Post-Conference forecast" http://www.ieee.org/web/conferences/organizers/required_documentation.html • Policy 10.1.6 - Conference Budgets http://www.ieee.org/web/aboutus/whatis/policies/p10-1.6.xml#10.1.6 • Conferences Organizational Manual - 9.0 The Finance Committee http://www.ieee.org/web/conferences/mom/all_manual.html#sectoct_9_0 	IEEE Conference Finance
	Between set up and close of conference	Secure W-8 and/or W-9 forms for tax compliance. Individuals receiving payment from IEEE must complete either a W-8 and/or W-9 form.	W-8 & W-9 Forms	<ul style="list-style-type: none"> • Forms W-8 & W-9 http://www.ieee.org/portal/pages/services/financial/tax/othertaxsubjects.html#Forms%20W-8%20&%20W-9 • Conferences Organization Manual - 9.0 The Finance Committee http://www.ieee.org/web/conferences/mom/all_manual.html#sectoct_9_0 	IEEE Conference Finance
	No later than January 10th of each year for all payments made in the previous calendar year	Complete 1099 and 1042 forms for all payments made in the previous calendar year. If no payments were made, 1099 and 1042 should still be submitted indicating "NONE".	1099 & 1042 Schedule of Payments	<ul style="list-style-type: none"> • 1099 & 1042 Schedule of Payments MS-Excel http://www.ieee.org/web/conferences/organizers/required_documentation.html 	IEEE Conference Finance
	No later than January 10th of each year for all payments made in the previous calendar year	Submit annual report on foreign bank accounts to IEEE Tax Dept.		<ul style="list-style-type: none"> • Conferences Organization Manual - 9.0 The Finance Committee 9.1.1.4 IEEE Requirements http://www.ieee.org/web/conferences/mom/sectoct_9.html 	IEEE Tax Compliance & Administration
	15-12 months BEFORE start date	Promote Call for Papers (CFP) and exhibit prospectus at current year's conference, if applicable		<ul style="list-style-type: none"> • Conferences Organization Manual - 11.0 The Exhibits Committee http://www.ieee.org/web/conferences/mom/sectoct_11.html 	Previous year's conference committee

Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services Bold = Required			<input checked="" type="checkbox"/> Detailed Conference Checklist		
<input checked="" type="checkbox"/>	WHEN actions/tasks should be completed (Recommended Deadlines)	WHAT actions/tasks need to be done	HOW to complete (Required Docs/Templates)	WHERE can I go to access forms, get more information, reference materials and policy?	WHO can I contact if I have questions?
	15-12 months BEFORE start date	Review and reconfirm hotel, meeting space and room block		<ul style="list-style-type: none"> • Conferences Organization Manual - 12.0 The Local Arrangements Committee http://www.ieee.org/web/conferences/mom/sectoct_12.html 	Previous year's conference committee
	15-12 months BEFORE start date	Meet with previous year's conference committee to discuss best practices			Previous year's conference committee
	12-9 months BEFORE start date	Submit Conference Publication Form to obtain Letter of Acquisition (LOA) which includes the IEEE Catalog Number, Library of Congress Number, the International Standard Book Numbers (ISBN) and International Standard Serials Number (ISSN), if applicable	Conference Publication Form	<ul style="list-style-type: none"> • IEEE Conference Publication Form http://www.ieee.org/web/conferences/organizers/required_documentation.html http://www.ieee.org/portal/pages/pubs/confpubcenter/instructions.html • Policy 10.1.20 - Conference Publications http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.20 • Conferences Organization Manual - 7.0 The Publications Committee http://www.ieee.org/web/conferences/mom/sectoct_7.html 	IEEE Conference Publications
	12-9 months BEFORE start date	Register for PDF eXpress which allows conference organizers and authors to convert application formats to IEEE Xplore-compatible PDFs, optional tool	IEEE PDF eXpress (optional)	<ul style="list-style-type: none"> • IEEE PDF eXpress http://www.ieee.org/portal/pages/pubs/confstandards/pdfexpress/index.html 	IEEE Conference Publications
	12-9 months BEFORE start date	Register for Electronic IEEE Copyright Form (eCF) if proceedings are acquired by the IEEE	Electronic IEEE Copyright Form (eCF)	<ul style="list-style-type: none"> • IEEE Copyright Form http://www.ieee.org/web/publications/rights/copyrightmain.html • Policy 6.3.1 - IEEE Copyright Policies http://www.ieee.org/web/aboutus/whatis/policies/p6-3.html#Policies • Conferences Organization Manual - 7.0 The Publications Committee http://www.ieee.org/web/conferences/mom/sectoct_7.html 	IEEE Intellectual Property Rights
	12-9 months BEFORE start date	Create website/link for paper submissions for authors that hosts the pub schedule, submission instructions, copyright agreement, frequently asked questions (FAQs) and contact info. Work with paper management company, if applicable.		<ul style="list-style-type: none"> • Conferences Organization Manual - 7.0 The Publications Committee http://www.ieee.org/web/conferences/mom/sectoct_7.html 	Previous year's conference committee
	12-9 months BEFORE start date	Secure permission from related IEEE OUs to market to their members using e-Notice		<ul style="list-style-type: none"> • IEEE e-Notice http://www.ieee.org/organizations/vols/e-notice/ 	IEEE Conference Business Services

Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services Bold = Required			<input checked="" type="checkbox"/> Detailed Conference Checklist		
<input checked="" type="checkbox"/>	WHEN actions/tasks should be completed (Recommended Deadlines)	WHAT actions/tasks need to be done	HOW to complete (Required Docs/Templates)	WHERE can I go to access forms, get more information, reference materials and policy?	WHO can I contact if I have questions?
	9-6 months BEFORE start date	Create registration form and establish a method for registration collection that is Payment Card Industry (PCI) compliant . Request IEEE membership verification CD to confirm valid IEEE Members.		<ul style="list-style-type: none"> • IEEE Credit Card Processing http://www.ieee.org/web/conferences/organizers/reference_materials.html • Policy 10.1.15 - Registration Fee Requirements http://www.ieee.org/web/aboutus/whatis/policies/p10-1.11.12.13.14.15.xml#10.1.15 • Conferences Organization Manual - 13.0 The Registration Committee http://www.ieee.org/web/conferences/mom/sectoct_13.html • IEEE Membership Verification CD http://www.ieee.org/web/conferences/organizers/ieeememberverification.html 	Previous year's conference committee IEEE Payment Card Industry (PCI) Compliance IEEE Conference Credit Card Processing IEEE Conference Business Services
	9-6 months BEFORE start date	Plan social activities and tour program, if applicable		<ul style="list-style-type: none"> • Conferences Organization Manual - 12.0 The Local Arrangements Committee http://www.ieee.org/web/conferences/mom/sectoct_12.html 	Previous year's conference committee
	9-6 months BEFORE start date	Send out RFPs for ground transportation and finalize contract, if applicable		<ul style="list-style-type: none"> • Conferences Organization Manual - 12.0 The Local Arrangements Committee http://www.ieee.org/web/conferences/mom/sectoct_12.html 	Previous year's conference committee
	6-4 months BEFORE start date	Launch registration site		<ul style="list-style-type: none"> • Conferences Organization Manual - 13.0 The Registration Committee http://www.ieee.org/web/conferences/mom/sectoct_13.html 	Previous year's conference committee
	6-4 months BEFORE start date	Complete paper review process. Finalize technical program. Notify speakers.		<ul style="list-style-type: none"> • Conferences Organization Manual - 6.0 The Program Committee http://www.ieee.org/web/conferences/mom/sectoct_6.html • Conferences Organization Manual - 7.0 The Publications Committee http://www.ieee.org/web/conferences/mom/sectoct_7.html 	Previous year's conference committee
	6-4 months BEFORE start date	Create and publish advanced program		<ul style="list-style-type: none"> • Conferences Organization Manual - 7.0 The Publications Committee http://www.ieee.org/web/conferences/mom/sectoct_7.html 	Previous year's conference committee
	4-3 months BEFORE start date	Solicit bids from printers and/or CD manufacturers based on accepted papers		<ul style="list-style-type: none"> • Conferences Organization Manual - 7.0 The Publications Committee http://www.ieee.org/web/conferences/mom/sectoct_7.html 	Previous year's conference committee
	4-3 months BEFORE start date	Organize and prepare for production of conference publications per Letter of Acquisition (LOA)		<ul style="list-style-type: none"> • Conferences Organization Manual - 7.0 The Publications Committee http://www.ieee.org/web/conferences/mom/sectoct_7.html 	IEEE Conference Publications

<div> <div>Related Areas:</div> <div>Conference Finance</div> <div>Conference Publications</div> <div>Conference Contracts</div> <div>Conference Business Services</div> <div>Bold = Required</div> </div>			<div> <input checked="" type="checkbox"/> Detailed Conference Checklist </div>		
<input checked="" type="checkbox"/>	WHEN actions/tasks should be completed (Recommended Deadlines)	WHAT actions/tasks need to be done	HOW to complete (Required Docs/Templates)	WHERE can I go to access forms, get more information, reference materials and policy?	WHO can I contact if I have questions?
	4-3 months BEFORE start date	Order attendee giveaways, speaker gifts, and/or conference shirts.			Previous year's conference committee
	4-3 months BEFORE start date	Determine preliminary exhibitor space assignments, if applicable		• Conferences Organization Manual - 11.0 The Exhibits Committee http://www.ieee.org/web/conferences/mom/sectoct_11.html	Previous year's conference committee
	4-3 months BEFORE start date	Request weekly reports from hotel(s) regarding rooms		• Conferences Organization Manual - 12.0 The Local Arrangements Committee http://www.ieee.org/web/conferences/mom/sectoct_12.html	Your Hotel(s)
	2 months BEFORE start date	Review room block with hotel(s) against attendance and contract(s)		• Conferences Organization Manual - 12.0 The Local Arrangements Committee http://www.ieee.org/web/conferences/mom/sectoct_12.html	Your Hotel(s)
	2 months BEFORE start date	Complete & print final program, advertising/publicity and registration reminders.		• Conferences Organization Manual - 6.0 The Program Committee http://www.ieee.org/web/conferences/mom/sectoct_6.html • Conferences Organization Manual - 7.0 The Publications Committee http://www.ieee.org/web/conferences/mom/sectoct_7.html • Conferences Organization Manual - 8.0 Publicity & Public Relations Committee http://www.ieee.org/web/conferences/mom/sectoct_8.html	Previous year's conference committee
	2 months BEFORE start date	Develop & finalize volunteer job functions/onsite needs.		• Conferences Organization Manual - 12.0 The Local Arrangements Committee http://www.ieee.org/web/conferences/mom/sectoct_12.html	Previous year's conference committee
	6-4 weeks BEFORE start date	Deadline for early registration (predetermined date)		• Conferences Organization Manual - 13.0 The Registration Committee http://www.ieee.org/web/conferences/mom/sectoct_13.html	Previous year's conference committee
	6-4 weeks BEFORE start date	Send prelim specifications [set up, catering, audio visual (AV)] to conference site. Order signage and recognition products (plaques, certificates and awards).		• Conferences Organization Manual - 12.0 The Local Arrangements Committee http://www.ieee.org/web/conferences/mom/sectoct_12.html	Previous year's conference committee
	6-4 weeks BEFORE start date	Ship final program to conference site			Your Conference Site (Facility/Venue)

Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services Bold = Required			<input checked="" type="checkbox"/> Detailed Conference Checklist		
<input checked="" type="checkbox"/>	WHEN actions/tasks should be completed (Recommended Deadlines)	WHAT actions/tasks need to be done	HOW to complete (Required Docs/Templates)	WHERE can I go to access forms, get more information, reference materials and policy?	WHO can I contact if I have questions?
	6-4 weeks BEFORE start date	Submit Pre-Conference forecast		<ul style="list-style-type: none"> • Select "IEEE Financial Web Form", Financial Report Type "Pre-Conference forecast" http://www.ieee.org/web/conferences/organizers/required_documentation.html • Policy 10.1.6 - Conference Budgets http://www.ieee.org/web/aboutus/whatis/policies/p10-1.6.xml#10.1.6 • Conferences Organizational Manual - 9.0 The Finance Committee http://www.ieee.org/web/conferences/mom/all_manual.html#sectoct_9_0 	IEEE Conference Finance
	2 days BEFORE start date	Confirm onsite logistics with venue (registration, exhibits, meeting rooms, food & beverage)		<ul style="list-style-type: none"> • Conferences Organization Manual - 12.0 The Local Arrangements Committee http://www.ieee.org/web/conferences/mom/sectoct_12.html 	Previous year's conference committee
	2 days BEFORE start date	Set-up registration area, exhibit space, information booth, office area.		<ul style="list-style-type: none"> • Conferences Organization Manual - 13.0 The Registration Committee http://www.ieee.org/web/conferences/mom/sectoct_13.html 	Previous year's conference committee
	HOLD CONFERENCE Conference Start & End Dates	Onsite registration			
		Monitor budget			
		Monitor daily activities and adjust onsite logistics as needed			
		Hold Post-Conference Wrap Up Meeting		<ul style="list-style-type: none"> • Conferences Organization Manual - 15.0 Post Conference Responsibilities http://www.ieee.org/web/conferences/mom/sectoct_15.html 	
	1 week but no later than 30 days AFTER end date	Submit Conference Proceedings/Content (Xplore CD and other media types) per Letter of Acquisition (LOA)		<ul style="list-style-type: none"> • IEEE Online Resource Center for Conference Publication Organizers http://www.ieee.org/portal/pages/pubs/confpubcenter 	IEEE Conference Publications
	1 week AFTER end date	Committee members submit final statistics and lessons learned to sponsoring IEEE OU			IEEE organizational unit (OU) you obtained sponsorship from
	20 days AFTER end date	Registration clean up (process refunds, receipts and balances due)		<ul style="list-style-type: none"> • Conferences Organization Manual - 13.0 The Registration Committee http://www.ieee.org/web/conferences/mom/sectoct_13.html 	
	1 month AFTER end date	Process outstanding bills			

Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services Bold = Required			<input checked="" type="checkbox"/> Detailed Conference Checklist		
<input checked="" type="checkbox"/>	WHEN actions/tasks should be completed (Recommended Deadlines)	WHAT actions/tasks need to be done	HOW to complete (Required Docs/Templates)	WHERE can I go to access forms, get more information, reference materials and policy?	WHO can I contact if I have questions?
	1 month AFTER end date	Repay all loans		<ul style="list-style-type: none"> • Policy 10.1.7 - Conference Advances http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.7 	IEEE Conference Finance
	1 month AFTER end date	Submit Post-Conference forecast		<ul style="list-style-type: none"> • Select "IEEE Financial Web Form", Financial Report Type "Post-Conference forecast" http://www.ieee.org/web/conferences/organizers/required_documentation.html • Policy 10.1.6 - Conference Budgets http://www.ieee.org/web/aboutus/whatis/policies/p10-1.6.xml#10.1.6 • Conferences Organizational Manual - 9.0 The Finance Committee http://www.ieee.org/web/conferences/mom/all_manual.html#sectoct_9_0 	IEEE Conference Finance
	3 months AFTER end date	Distribute surplus		<ul style="list-style-type: none"> • Policy 10.1.9 - Distribution of Surplus and Deficits http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.9 	IEEE Conference Finance
	3 months AFTER end date	Close conference bank account & submit proof of account closure	Closing of Bank Accounts/Destroy Unused Checks Form for Concentration Banking Accounts	<ul style="list-style-type: none"> • Concentration Banking Destroy Check form (if Concentration Banking was used) http://www.ieee.org/web/conferences/organizers/required_documentation.html • Policy 10.1.8 - Conference Bank Account Signatures http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.8 • Conferences Organization Manual - 9.0 The Finance Committee http://www.ieee.org/web/conferences/mom/all_manual.html#sectoct_9_0 	IEEE Conference Finance
	4-5 months AFTER end date	Prepare and submit all audit material to independent auditor <i>Co-sponsored conferences, where IEEE has a 50% or less financial responsibility shall be encouraged to participate in the audit process. Conferences where IEEE has greater than a 50% financial responsibility, including conferences that are solely IEEE sponsored, and where the actual or budgeted income or expense is \$100,000 or more must be audited by a professional independent source, outside the sponsoring organizational unit.</i>	Audit Report, if applicable	<ul style="list-style-type: none"> • Requirements for Audits of Conference Financial Activities http://www.ieee.org/web/conferences/organizers/closing_and_post.html#audit • Policy 10.1.10 - Auditing of Conference Finances http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.10 • Conferences Organization Manual - 10.0 Conference Audits http://www.ieee.org/web/conferences/mom/sectoct_10.html 	IEEE Conference Finance IEEE Operations (Internal) Audit
	3-6 months AFTER end date	Submit final financial report with Certification of Accuracy	Final Financial & Certification of Accuracy	<ul style="list-style-type: none"> • Select "IEEE Financial Web Form", Financial Report Type "Final" http://www.ieee.org/web/conferences/organizers/required_documentation.html 	IEEE Conference Finance

Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services Bold = Required		<input checked="" type="checkbox"/> Detailed Conference Checklist			
<input checked="" type="checkbox"/>	WHEN actions/tasks should be completed (Recommended Deadlines)	WHAT actions/tasks need to be done	HOW to complete (Required Docs/Templates)	WHERE can I go to access forms, get more information, reference materials and policy?	WHO can I contact if I have questions?

Contact IEEE Staff:

<u>Department</u>	<u>Phone</u>	<u>E-mail</u>
IEEE Conference Business Services	+1 732 562 3878	conference-services@ieee.org
IEEE Conference Contracts	+1 732 562 6826	conference-contracts@ieee.org
IEEE Conference Finance	+1 732 562 3878	conference-finance@ieee.org
IEEE Concentration Banking	+1 732 562 5363	concentration-banking@ieee.org
IEEE Insurance	+1 732 562 5541	ieeeinsurance@ieee.org
IEEE Operations (Internal) Audit	+1 732 562 6371 or 6533	ops-audit@ieee.org
IEEE Tax Compliance & Administration	+1 732 562 5334	tax-staff@ieee.org
IEEE Payment Card Industry (PCI) Compliance	+1 732 562 5322	s.stiles@ieee.org
IEEE Conference Credit Card Processing	+1 732 562 5598 or 3981	p.curtis@ieee.org or j.punsal@ieee.org
IEEE Conference Publications	+1 732 562 3872 or 3875	confpubs@ieee.org
IEEE Intellectual Property Rights	+1 732 562 3966	copyrights@ieee.org
IEEE Development Office	+1 732 562 3860	k.galuchie@ieee.org

C O N F E R E N C E T I M E L I N E																										
P R E - C O N F E R E N C E												HOLD CONFERENCE	P O S T - C O N F E R E N C E													
START	24 MONTHS	24-18 MONTHS	18-15 MONTHS	15-12 MONTHS	12-9 MONTHS	9-6 MONTHS	6-4 MONTHS	4-3 MONTHS	2 MONTHS	6-4 WEEKS	2 DAYS		1 WEEK	20 DAYS	1 MONTH	3 MONTHS	4-5 MONTHS	5-6 MONTHS								
Determine and apply for sponsorship from all applicable IEEE and/or non-IEEE organizational units (OU)	Obtain Sponsorship	Appoint General Chair and Conference Committee	Develop communications plan, marketing materials and conference website	Develop process/identity system for paper management	Submit Conference Publication Form to obtain Letter of Acquisition (LOA)	Create registration form and ensure registration service is Payment Card Industry (PCI) compliant	Launch registration site	Solicit bids from printers and/or CD manufacturers based on accepted papers	Review room block with hotel against attendance and contracts	Deadline for early registration	Confirm onsite logistics with venue	Onsite Registration	Submit Conference Proceedings/Content (Xplore CD and other media types) per LOA			Distribute surplus	Prepare and submit all audit material to independent auditor									
							Develop technical program, establish paper submission process and deadlines			Register for PDF eXpress (optional)	Plan social activities and tour program, if applicable					Complete paper review process. Finalize technical program. Notify speakers.			Send prelim. specifications to conference site. Order signage and recognition products.	Set-up registration area, exhibit space, information booth, office area	Close conference bank account & submit proof of account closure	Audit Report for >\$100K and/or IEEE OU total is 51%+ co-sponsor				
		Contact the local IEEE Section	Send request for proposal (RFP) to exhibit decorators and develop exhibitor prospectus, if applicable	Establish a Call For Papers (CFP)	Register for Electronic IEEE Copyright Form (eCF) if proceedings are acquired by IEEE	Send out RFPs for ground transportation and finalize contract, if applicable	Create and publish advanced program	Organize and prepare for production of conference publications per Letter of Acquisition (LOA)	Complete and print final program, advertising/publicity and registration reminders	Ship final program to conference site	Submit Pre-Conference forecast		Committee members submit final statistics and lessons learned to OU	Registration clean up (process refunds, receipts and balances due)	Repay all Loans	Submit final financial report with Certification of Accuracy										
	Register your conference, submit Conference Information Schedule & Committee List	Begin outreach to educational institutions, corporations, government and industry for support and patronage	Update conference website with page/link about CFP information		Order attendee giveaways, speaker gifts, and/or conference shirts	Develop and finalize volunteer job functions/onsite needs.																				
	Submit Memorandum of Understanding (MOU) , if applicable	Apply for grants for conference support	Establish a Visa process for international attendees and post on the conference website	Create website for paper submissions. Work with paper management company, if applicable	Secure permission from related IEEE OUs to market to their members using e-Notice		Determine preliminary exhibitor space assignments, if applicable																			
	Contract conference management company, if applicable		Submit conference budget with written IEEE OU approval(s) for headquarter review																							
	Site selection and contract review , if applicable			Submit Principles of Business Conduct Compliance Certificate and Conflict of Interest Disclosure Statement (POBC/COI) forms																						
	Review IEEE Insurance coverage and determine if additional coverage is required																		Submit updated committee list							
	Review tax information to ensure IRS and international compliance VAT and GST			Establish conference bank account(s)																						
				Request and obtain loan from OU, if needed																						
				Pre-and Post Conference forecasts [Submit Pre- and Post- Conference forecasts by November 30th of each calendar year for accrual purposes.]																						
				Secure W-8 and/or W-9 forms for tax compliance																						
				1099 & 1042 Schedule of Payments [No later than January 10th of each year for all payments made in the previous calendar year.]																						
				Submit annual report on foreign bank accounts to IEEE Tax Dept. [No later than January 10th of each year for all payments made in the previous calendar year.]																						
				Promote CFP and exhibit prospectus at current year's conference, if applicable																						
				Review and reconfirm hotel, meeting space and room block																						
				Meet with previous year's committee to discuss best practices																						
													P O S T - C O N F E R E N C E													
*Disclaimer: This timeline is for planning purposes only.																										
P R E - C O N F E R E N C E																										
P O S T - C O N F E R E N C E																										

Conference Finance

Conference Publications

Conference Contracts

Conference Business Services

Boldface = Required

*Disclaimer: This timeline is for planning purposes only.