

 *powered by*
**IEEE MEETINGS,
CONFERENCES & EVENTS**

Meetings, Conferences & Events (MCE)

Meetings Conferences & Events (MCE)

Conference Organizers

- MCE has vast experience that you can leverage at *any time* while planning your conference
- MCE can act in a consultative manner or provide actual services
- MCE single point of contact - please contact MCE's Customer Relationship Management Team at ieee-mce@ieee.org



**IEEE MEETINGS,
CONFERENCES & EVENTS**

Ways that MCE Can Assist You

Consultative Advice - Complimentary

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



IEEE MEETINGS,
CONFERENCES & EVENTS

MCE Support

- ▶ For general questions regarding conferences please contact MCE's Customer Relationship Management Team at ieee-mce@ieee.org.
- ▶ Be on the look out for MCE's Conference Organizer Education Program Roll out !



IEEE MEETINGS,
CONFERENCES & EVENTS



Resources

Conference Sponsorship
Technical Program
Conference Finance
Conference Publications

Resources – Sponsorship

- **MCE – Single Point of Contact**
 - ieee-mce@ieee.org
- **Running an IEEE Conference**
 - http://www.ieee.org/conferences_events/conferences/organizers/index.html
- **IEEE - Conference Sponsorship Overview**
 - http://www.ieee.org/conferences_events/conferences/organizers/conference_sponsorship.html
- **IEEE Online Conference Application Form & Multi-language Tutorials (Spanish, Mandarin, French)**
 - http://www.ieee.org/conferences_events/conferences/organizers/conference_application_form.html

Resources – Conference Sponsorship

▶ IEEE Brand Identity Toolkit

- <http://www.ieee.org/about/toolkit/index.html>

▶ Societies and Communities

- http://www.ieee.org/societies_communities/index.html

▶ Member and Geographic Activities (MGA)

- http://www.ieee.org/societies_communities/geo_activities/units/index.html

▶ MCE Services

- http://www.ieeemcm.org/index.php?option=com_content&view=article&id=46&Itemid=75

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- **MCE Services**
 - http://www.ieeemcm.org/index.php?option=com_content&view=article&id=46&Itemid=75

Resources – Technical Program

➤ Managing Peer Review

- http://www.ieee.org/conferences_events/conferences/organizers/managing_peer_reviews.html

➤ Planning a Technical Program

- https://www.ieee.org/conferences_events/conferences/organizers/planning_technical_program.html

➤ IPR - New Policy Introduces Plagiarism Detection to the Publication Workflow

- https://www.ieee.org/publications_standards/publications/rights/plagiarism/plagiarism_detection_announcement.pdf

➤ IEEE Conference Proceedings Defined

- <http://www.ieee.org/documents/confprocdefined.pdf>

➤ CrossCheck Portal

- http://www.ieee.org/publications_standards/publications/rights/crosscheckportal.html

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➤ CrossCheck Portal

- http://www.ieee.org/publications_standards/publications/rights/crosscheckportal.html

Resources –Publications

► Publications Form

- http://www.ieee.org/conferences_events/conferences/organizers/conf_app.html?appName=Publication

► IEEE Electronic Copyright Form

- http://www.ieee.org/publications_standards/publications/rights/eCF_Registration_Intro.html

► Packing List Generator: This tool allows you to identify all PDF files by content type, which ensures that all files can be accounted for during processing.

- http://www.ieee.org/conferences_events/conferences/organizers/pubs/preparing_content.html

► PDF eXpress & PDF eXpress Plus: IEEE-financed author tools that assist IEEE conference organizers in obtaining IEEE Xplore®-compatible PDFs from their authors

- http://www.ieee.org/conferences_events/conferences/publishing/pdfexpress.html

Resources –Publications

- **IEEE Conference Proceedings Defined**
 - <http://www.ieee.org/documents/confprocdefined.pdf>
- **Preparing Conference Content for the IEEE Xplore® Digital Library**
 - http://www.ieee.org/conferences_events/conferences/organizers/pubs/preparing_content.html
- **IEEE Publishing Services**
 - [IEEE eXpress Conference Publishing](#) & [IEEE Computer Society's Conference Publishing Services \(CPS\)](#)
 - https://www.ieee.org/conferences_events/conferences/organizers/organizers_services.html
- **Conference Application**
 - http://www.ieee.org/conferences_events/conferences/organizers/conf_app.html

Resources –Publications

▶ IEEE Copyright Policies

- http://www.ieee.org/publications_standards/publications/rights/copyrightpolicy.html

▶ Copyright Questions (IEEE eCopyright Form)

- Contact Bill Hagen, IEEE Intellectual Property Rights Office (w.hagen@ieee.org or +1-732-562-3966)
- http://www.ieee.org/publications_standards/publications/rights/index.html

▶ IPR New Policy Introduces Plagiarism Detection to the Publication Workflow

- https://www.ieee.org/publications_standards/publications/rights/plagiarism/plagiarism_detection_announcement.pdf

▶ IEEE Conference Proceedings Defined

- <http://www.ieee.org/documents/confprocdefined.pdf>

Resources – Conference Finance

➤ Tools and resources for conference finances

- Budget planning and management, banking and credit cards, taxes, insurance, audits and conference closing
- http://www.ieee.org/conferences_events/conferences/organizers/toolkit_finance.html

➤ IEEE's Financial Reporting Workbook (Budgeting)

- www.ieee.org/documents/financial_reporting_tool.xls

➤ IEEE Conference Financials – submit budget updates, forecasts and compliance information

- http://www.ieee.org/conferences_events/conferences/organizers/conf_app.html?pageType=finance

➤ Conference Contracts (reporting)

- conference-contracts@ieee.org

Resources – Conference Finance

➤ **Conflict of Interest Form**

- <http://www.ieee.org/about/corporate/compliance/index.html>

➤ **Event Cancellation Insurance** is available – take advantage of the IEEE buying power and receive a discounted rate

- Submit your request to Conference Business Operations
- http://www.ieee.org/about/volunteers/risk_insurance/conference_insurance.html

➤ **IEEE Concentration Banking Program** questions/forms

- Email Conference-Finance@IEEE.org to request the necessary forms

➤ **Conference Audit Information**

- http://www.ieee.org/conferences_events/conferences/organizers/finance_audits.html

Resources – Conference Finance

- ▶ The preferred submission method for budget/budget updates is by using the **IEEE Conference Financial Reporting tool**
 - http://www.ieee.org/conferences_events/conferences/organizers/conf_app.html?pageType=finance

MCE Business Operations

Contact information for conference finance questions

By Email: Conference-Finance@IEEE.org

By Phone: 732.562.3878

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Glossary

Technical Program
Conference Finance
Conference Publications
Conference Sponsorship

Glossary - Sponsorship

- ▶ **MCE:** Meetings, Conferences & Events department
- ▶ **CRM:** Customer relationship management
- ▶ **Memorandum of Understanding (MOU):** a document describing a bilateral or multilateral agreement between two or more parties. IEEE requires an executed MOU for all co-sponsored conferences.
- ▶ **Organizational Unit (OU):** An IEEE Region, Section, Chapter, Student Branch or Society
- ▶ **For-profit organizations:** Commercial organizations that operate as businesses whose primary directives include creating profit which is expended as those businesses choose, including distribution to shareholders and owners.
- ▶ **Non-Profit:** Organizations which are established to further a social cause, such as education, government, charity, or professional enrichment, and which do not distribute surplus funds to owners or shareholders but instead use earnings to help pursue their missions or organizational goals.

Glossary – Technical Program

- ▶ **Reviewer:** You play a key role in ensuring that only papers of the highest quality are published.
 - The IEEE has published guidelines regarding reviewers in the [IEEE Publication Services and Products Board Operations Manual](#)(PDF).
- ▶ **Abstracting service:** a service that provides abstracts of publications, often on a subject or group of related subjects, usually on a subscription basis.
- ▶ **Indexing service:** a service that assigns descriptors and other kinds of access points to documents.
- ▶ **IPR:** Intellectual Property Rights
- ▶ **MCE:** Meetings, Conferences & Events department

Glossary – Technical Program

- ▶ **Peer Review/Tool:** A peer review is a process where technical papers are reviewed by qualified individuals who are experts in the same field. Peer reviews are used to determine a technical paper's suitability for publication. IEEE recommends that you use a peer-review tool to manage conference papers. A peer-review tool helps you to follow a consistent process and improves the quality of your reviews.
- ▶ **Plagiarism:** IEEE defines plagiarism as the reuse of someone else's prior ideas, processes, results, or words without explicitly acknowledging the original author and source.
- ▶ **Single blind review:** The reviewer's name is unknown to the author.
- ▶ **Double-blind review process.** This means that in addition to the reviewers being unknown to the authors, the authors will be unknown to the reviewers. The double-blind review process is a way to prevent bias or the perception of bias towards any author.

Glossary - Publications

- ▶ **ISBN number:** The International Standard Book Number (ISBN) is a unique numeric commercial book identifier based upon the 9-digit Standard Book Numbering (SBN)
- ▶ **ISS number:** Another identifier, the International Standard Serial Number (ISSN), identifies periodical publications such as magazines.
- ▶ **Document Object Identifier (DOI):** a character string (a "digital identifier") used to uniquely identify an object such as an electronic document. Metadata about the object is stored in association with the DOI name and this metadata may include a location, such as a URL, where the object can be found.
- ▶ **Abstracting service:** a service that provides abstracts of publications, often on a subject or group of related subjects, usually on a subscription basis.
- ▶ **Indexing service:** a service that assigns descriptors and other kinds of access points to documents.

Glossary - Publications

- **Letter of Acquisition (LoA):** The Letter of Acquisition (LoA) is an agreement between your conference and IEEE to consider your conference for acceptance into the Conference Publication Program (CPP) and IEEE Xplore®.
 - http://www.ieee.org/conferences_events/conferences/organizers/letter_of_acquisition.html
- **Conference Publications:** refers to all material that is published in relation to the conference, including but not limited to the conference's final program and the conference proceedings that result.
 - http://www.ieee.org/conferences_events/conferences/organizers/pubs/conference_publications.html
- **Journal Factor / Impact factor (IF):** an academic journal is a measure reflecting the average number of citations to recent articles published in the journal. It is frequently used as a proxy for the relative importance of a journal within its field, with journals with higher impact factors deemed to be more important than those with lower ones.
- **Citation:** a reference to a published or unpublished source (not always the original source).

Glossary - Publications

What is Copyright?

- ▶ Copyright is one of a group of intellectual property rights (or laws) that are intended to protect the interests of an author or copyright owner.
- ▶ These laws give an author/owner nearly exclusive control over the use of his/her work. In particular, copyright protects the specific expression of an idea (e.g., the specific wording of your text) but not the idea itself.
- ▶ Copyright comes into existence the moment a work (an article, a book, a computer program, an email, a symphony, a sculpture, etc.) is first fixed in any tangible medium of expression, now known or later developed, from which it can be perceived, reproduced, or otherwise communicated, either directly or with the aid of a machine or device.

Glossary - Publications

Copyright (continued)

- ▶ **What happens when an author signs the IEEE Copyright Form?**
 - When an author signs the IEEE Copyright Form, he/she is transferring ownership of the copyright rights in the work to the IEEE. In other words, the IEEE becomes owner of the paper when the author signs, dates and submits an IEEE Copyright Form.
- ▶ **Front matter:** Title page, copyright page, table of contents

Glossary – Conference Finance

Revenue: Income that a company receives from its normal business activities, usually from the sale of goods and services to customers.

Expense: An outflow of cash or other valuable assets from a person or company to another person or company. This outflow of cash is generally one side of a trade for products or services that have equal or better current or future value to the buyer than to the seller.

- In double-entry bookkeeping, expenses are recorded as a debit to an expense account (an income statement account) and a credit to either an asset account or a liability account, which are balance sheet accounts. An expense decreases assets or increases liabilities.

Glossary – Conference Finance

Direct Tax: The term direct tax generally means a tax paid directly to the government by the persons on whom it is imposed.

Indirect Tax: An **indirect tax** (such as sales tax, a specific tax, value added tax (VAT), or goods and services tax (GST)) is a tax collected by an intermediary (such as a retail store) from the person who bears the ultimate economic burden of the tax (such as the consumer). The intermediary later files a tax return and forwards the tax proceeds to government with the return.

d/b/a: Doing business as

Additional Information

Conference Organizer Tips & Tools

Budget
Packing List Generator
Taxes



Budget Tool

Conference Budget Planning Worksheet

- ▶ A helpful tool for the budgeting process is the Conference Budget Planning Worksheet
 - This tool that will help you organize your conference's financial information (optional: you can use your own budgeting tool)
 - Budget checklist and worksheet
 - Revenue and expense worksheet - filling out this form will lead to a more accurate projection of your conference's net surplus or deficit
 - Social function tracker
 - Financial summary
 - Certification of Accuracy
 - Conference closing requirement checklist

Conference Budget Planning Worksheet

- IEEE's financial reporting workbook is available at: www.ieee.org/documents/financial_reporting_tool.xls
- The tool produces a summary report that is helpful for reporting

Revised Version
23-Jun-10

IEEE CONFERENCE FINANCIALS
SUMMARY FINANCIAL REPORT FOR IEEE SPONSORED OR COSPONSORED CONFERENCES
PLEASE FILL OUT GREY SHADED AREAS IF NOT USING THE BUDGET WORKSHEET

1. Conference Title: 0

1a. Conference num: 0 1b. Conference Acronym: 0

2. Dates: From: 0-Jan-00 To: 0-Jan-00 3. Location: 0

TYPE OF REPORT / CURRENCY USED
4. Indicate type of report by checking one box: ☐ Budget ☐ Interim ☐ Actual

5. All revenue and expense figures below must be in U.S. Dollars. For Conferences held outside the U.S.A., indicate the local currency (e.g., Swiss Francs), the conversion units (Dollar and date).

INSTRUCTIONS: [CLICK HERE for INSTRUCTIONS for SUMMARY page - Drop Down Window](#)

Local Currency: USD Conversion Rate: 1.00000 Conversion Date: please enter date

Report Date: 00/00/00 00/00/00 00/00/00

REVENUE	BUDGET	INTERIM REPORT	FINAL REPORT / ACTUAL
6. Registration Fees	0.00	0.00	0.00
7. Grants, Donations	0.00	0.00	0.00
8. Conf. Publicat. Sales	0.00	0.00	0.00
9. Exhibits	0.00	0.00	0.00
10. Social Event	0.00	0.00	0.00
11. All Other Receipts	0.00	0.00	0.00
12. Total Conf. Revenue	0.00	0.00	0.00 A
13. Conference Loans	0.00	0.00	0.00
14. Total Receipts	0.00	0.00	0.00
EXPENSE			
15. Management Services	0.00	0.00	0.00
16. Registration Expense	0.00	0.00	0.00
17. Promotion	0.00	0.00	0.00
18. Conf. Publicat.	0.00	0.00	0.00
19. Exhibits/Vendors	0.00	0.00	0.00
20. Local arrangements	0.00	0.00	0.00
21. Social Functions	0.00	0.00	0.00
22. Program Expense	0.00	0.00	0.00
23. Administration	0.00	0.00	0.00
24. Society Admin Fee	0.00	0.00	0.00
25. Audit Fee	0.00	0.00	0.00
26. Committee	0.00	0.00	0.00
27. VAT Owed	0.00	0.00	0.00
28. All Other Outlays	0.00	0.00	0.00
29. Total Conf Exp.	0.00	0.00	0.00 B
30. Loan Repayments	0.00	0.00	0.00
31. Total Outlays	0.00	0.00	0.00
SURPLUS/(LOSS)			
32. Surplus/(Loss)-(Item 13 less Item 30)	0.00	0.00	0.00 A - B
USD Translated Equivalent Total Surplus:	\$0.00	\$0.00	\$0.00

Page 1



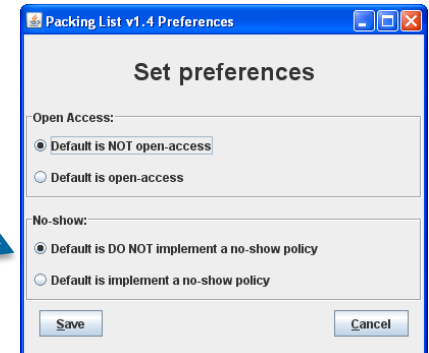
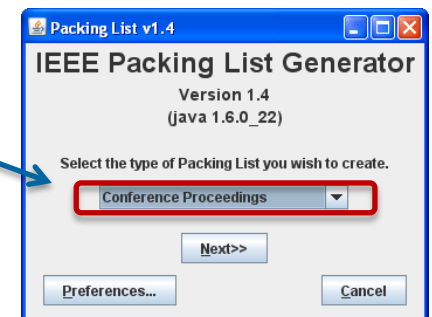
Submitting your Conference Budget

- It is required that you submit your budget to IEEE at the Conference and Event Financial Reporting page
 - http://www.ieee.org/conferences_events/conferences/organizers/conf_app.html?pageType=finance
- This application allows you to submit your budget, forecast and actual finance & compliance information to IEEE
 - Completing the form should take 10-15 minutes
- You are submitting a summary of conference revenues and expenses, registration rates, and projected attendance statistics
- If you would like assistance with submitting your budget, contact the Conference Business Operations Team

Download The Packing List Generator

PLG – Tips

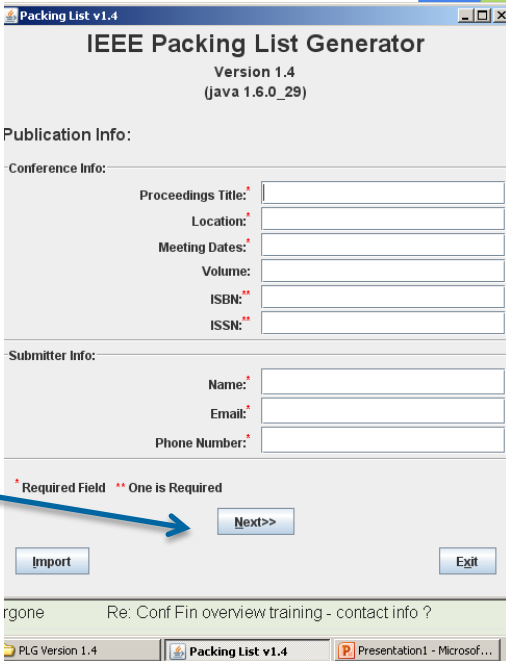
- Java Runtime Environment (JRE) version 1.5 is the minimum version that runs the program, 1.6 or later is recommended
- Start the PLG by double clicking on the packinglist_v1.4.jar
- Choose the type of packing list you want to create, the default the is "Conference Proceedings"
- Setting Preferences: change if necessary
 - For conferences make sure the value is NOT open access
 - Select appropriate no show policy
 - (conference non-presented paper policy)
 - Click "Next" to proceed



PLG – Publication Information

- This form collects publication level information and information about who should be contacted if there are any questions about the packing list. Complete form.

- Click “Next”
- Basic validation occurs
 - Example: ISBN or ISSN must be valid
 - If there are no errors the following window opens



The screenshot shows the 'IEEE Packing List Generator' window, Version 1.4 (java 1.6.0_29). It contains two main sections: 'Publication Info:' and 'Submitter Info:'. The 'Publication Info:' section includes fields for 'Conference Info:' (Proceedings Title, Location, Meeting Dates, Volume, ISBN, ISSN) and 'Submitter Info:' (Name, Email, Phone Number). A legend indicates that a single asterisk (*) denotes a 'Required Field' and a double asterisk (**) denotes a field where 'One is Required'. The 'Next>>' button is highlighted with a blue arrow pointing from the text 'Click “Next”' in the list. The 'Import' and 'Exit' buttons are also visible. The status bar at the bottom shows 'rgone', 'Re: Conf Fin overview training - contact info ?', and the taskbar includes 'PLG Version 1.4', 'Packing List v1.4', and 'Presentation1 - Microsof...'.

- Use the PDF browser to locate the folder containing the PDF files for publication



PLG – Article Info

- Click on “Select All” to select all the PDFs. To exclude a PDF from the packing list, uncheck the box next to the file name.
 - Exclude is not suppress
- Update the content types
 - Table of contents
- Update the “Suppress” column if applicable
 - Used for “No Show” – if conference policy dictates

IEEE Packing List Generator
Version 1.4
(java 1.6.0_22)

Article Info:

PDF Files

Select All

Manage Multimedia

Use PDF?*	Filename*	Content Type	Suppress?*	Open Access*	Seq Order #*	Multimedia	Identifier
<input type="checkbox"/>	20490003.pdf	orig-research	<input type="checkbox"/>	<input type="checkbox"/>	1		
<input type="checkbox"/>	20490012.pdf	orig-research	<input type="checkbox"/>	<input type="checkbox"/>	2		
<input type="checkbox"/>	20490021.pdf	orig-research	<input type="checkbox"/>	<input type="checkbox"/>	3		
<input type="checkbox"/>	20490029.pdf	orig-research	<input type="checkbox"/>	<input type="checkbox"/>	4		
<input type="checkbox"/>	20490039.pdf	orig-research	<input type="checkbox"/>	<input type="checkbox"/>	5		
<input type="checkbox"/>	20490048.pdf	orig-research	<input type="checkbox"/>	<input type="checkbox"/>	6		
<input type="checkbox"/>	20490058.pdf	orig-research	<input type="checkbox"/>	<input type="checkbox"/>	7		
<input type="checkbox"/>	20490066.pdf	orig-research	<input type="checkbox"/>	<input type="checkbox"/>	8		
<input type="checkbox"/>	20490074.pdf	orig-research	<input type="checkbox"/>	<input type="checkbox"/>	9		
<input type="checkbox"/>	20490083.pdf	orig-research	<input type="checkbox"/>	<input type="checkbox"/>	10		
<input type="checkbox"/>	20490092.pdf	orig-research	<input type="checkbox"/>	<input type="checkbox"/>	11		

* Required Field

Search Another Directory

Save Packing List

Clear List

<<Back

Exit

See under the Resource Section, the link to download the PLG, it provides additional detail on utilizing this tool.

Tax Collection & Reporting

- Income Taxes – completing a 1099 form is required when payments are made to U.S. citizens and US resident aliens
- Income Taxes – completing a 1042 form is required when payments are made to a non-U.S. citizens from a conference located in the United States
- Tax reportable payments include: Awards, grants, honoraria, prizes, commissions
- Gather the following information before payment is made:
 - Full name & Permanent Address
 - U.S. Citizenship Status (Citizen, Resident Alien, etc.)
 - U.S. Social Security # (if US Citizen/Resident Alien)
 - Total payments issued in \$US
 - Calendar year payment was made

Purpose of payment



Tax Collection & Reporting

Indirect Tax

- It is mandatory for all conferences to comply with applicable indirect tax requirements such as Value Added Tax (VAT), Goods and Services Tax (GST) and Sales Tax
 - Each country sets its own regulations, handling of indirect taxes can be complex
- It is recommended to contact the Conference Business Operation team for guidance. For complex situations, the IEEE Indirect Tax group is also available to assist
 - Budgeting for VAT
 - Consulting for tax compliance
 - Tax return filing
- Full indirect tax compliance service is available for the following countries:
 - Italy, France, the Netherlands, Portugal, Spain, the United Kingdom, Germany, Austria, Czech Republic, Ireland, Greece, Hungary, Australia

END