



Types of IEEE Conference Sponsorships

Memorandum of Understanding (MOU)

IEEE Sponsorship

- ▶ When sponsoring an IEEE conference it refers to your percentage of the financial and technical responsibilities in running an IEEE sponsored conference





IEEE Sponsorship Definitions

► Financial Investment

- Sole Sponsorship
 - Your OU has 100% ownership for both the financial and technical responsibilities related to your conference
- Co-Sponsorship
 - Your OU has shared ownership for both the financial and technical responsibilities related to your conference

► No Financial Investment

- Technical Co-sponsorship
 - Your OU will have direct and substantial involvement in executing a high quality technical program and oversight of IEEE brand usage



Sole Sponsorship

Financial Investment

Sole sponsorship indicates full and sole organizational unit involvement in a conference

As a conference organizer you will ensure the following key responsibilities are managed

- Validating the conference scope is aligned with IEEE and setting parameters to execute a high quality technical program
- Executing a successful conference that produces a positive surplus (20% goal)
 - Your OU will receive 100% of surplus or be responsible for a deficit
- Ensuring appropriate representation of the IEEE brand on all communications, websites and marketing materials



Sole Sponsorship (continued)

Financial Investment

- Venue selection, negotiating services, exhibit management, publication of programs and proceedings, marketing and public relations
- Coordinating resource management and full administration of conference
- Escalating any legal issues to IEEE Conference Business Services
- Obtaining approval of the conference from IEEE



Co-Sponsorship

Shared Financial Investment and Responsibilities

Co-sponsorship indicates shared involvement among several organizations, one of which is an IEEE Organizational Unit (OU)

- ▶ The IEEE OU's financial responsibility is shared based on an agreed upon percentage
- ▶ Example: The IEEE OU has 70% share, the Co-sponsor has 30% share and conference surplus is \$10,000
 - IEEE OU = \$7,000 / Co-sponsor = \$3,000
 - Financial management is typically managed by the majority owner
- ▶ A Memorandum of Understanding (MOU) is required prior to approval. This document defines the agreed upon financial split and conference responsibilities for each party



Co-Sponsorship(continued)

Shared Financial Investment and Responsibilities

As a conference organizer you are responsible for managing and coordinating the following responsibilities with your co-sponsor/s

- ▶ Validating the conference scope is aligned with IEEE and setting parameters to execute a high quality technical program
- ▶ Executing a successful conference that produces a positive surplus (20%)
- ▶ Venue selection, negotiating services, exhibit management, publication of programs and proceedings, marketing and public relations
- ▶ Ensuring appropriate representation of the IEEE brand on all communications, websites and marketing materials
- ▶ Coordinating resource management and full administration of conference
- ▶ Escalating any legal issues to IEEE Conference Business Services
- ▶ ⁷Obtaining approval of the conference from IEEE



Technical Co-Sponsorship

No Financial Investment

Technical Co-Sponsorship indicates that IEEE has direct and substantial involvement in the organization and execution of the technical program. The financial sponsor/s are allowed to use the IEEE logo for promotional use and the conference's proceedings are eligible for publication in Xplore.

As a conference organizer you need to ensure the following key responsibilities are managed

- Validating the conference scope is aligned with IEEE and setting parameters to execute a high quality technical program
- Provide direct involvement in the Technical Program
 - Examples include: An IEEE volunteer is the Technical Program Chair, a Track Chair, you assign reviewers to conference, you review papers

Technical Co-Sponsorship (continued)

No Financial Investment

- All conference proceedings are subject to random content quality audits
- The IEEE Technical Program Integrity Committee is responsible for monitoring content quality
 - This committee is made up of IEEE volunteers
- Ensure content quality by having your OU resources directly involved in the technical program for all Technically Co-sponsored conferences





Technical Co-Sponsorship (continued)

No Financial Investment

- A Memorandum of Understanding (MOU) is required prior to approval
- Oversight of the IEEE brand in all marketing materials
 - Any conference is not allowed to guarantee publication of their proceedings on conference websites, call for papers or any conference communications
- The financial sponsor/s is responsible for managing the overall conference (not the IEEE OU)
 - Examples: venue selection, negotiating services, exhibit management, marketing and public relations
- Obtaining approval of the conference from IEEE



When to Provide Technical Co-Sponsorship

- To become involved with new, cutting edge science or technologies where IEEE is not a major player
- To increase the IEEE brand exposure to a new audience
- Providing technical co-sponsorship is an effective way for you to determine if a non-IEEE organization should be considered for financial sponsorship in the future
- To provide an activity for your OU members to participate in
- When you have a lack of resources to financially sponsor a conference
 - You can only provide resources to assist with the technical program execution

Memorandum of Understanding - MOU

Memorandum of Understanding (MOU)

- ▶ A memorandum of understanding (MoU) describes a bilateral or multilateral agreement between two or more parties
- ▶ A Memorandum of Understanding (MOU) is required when two or more entities have agreed to provide co-sponsorship to a IEEE conference
- ▶ The MOU protects the interests of all parties is good business practice
- ▶ A MOU defines the responsibilities for all sponsors and is endorsed by all participants. (via an electronic review and signatory process)
- ▶ Co-sponsors may be IEEE organizational units or not-for-profit non-IEEE organizations
- ▶ All MOUs are approved by Conference Business Services





Memorandum of Understanding

MOU

- After you submit the IEEE Conference Application, IEEE requests confirmation of your conference sponsorship. If you have more than one sponsor for your conference, IEEE will send each sponsor a link to an online MOU form
- IEEE sends the MOU to the sponsor signatory who was entered in the IEEE Conference Application. As the signatory, the person is authorized to enter into contract agreements for your conference
- Each party reviews and chooses either “Approve or Decline”
 - If you choose Decline, enter a reason for declining the MOU
 - If the sponsor declines the MOU, IEEE will contact the person who submitted the application and all sponsoring representatives.
- Meetings, Conferences & Events (MCE) will work with those mentioned to update the information in your IEEE Conference Application

Working with Non-IEEE Organizations

HAND OUT: EVALUATING CONFERENCE SPONSORSHIP OPPORTUNITIES

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

EVALUATING CONFERENCE SPONSORSHIP OPPORTUNITIES

Learning Objective
To provide an approach that aids the conference sponsorship evaluation process. An IEEE OU is not required to sponsor a conference. In fact, we should be selective and agree to only sponsor conferences that provide value to our membership.

Audience
Conference Organizers & IEEE Organization Units

Benefits
By utilizing the following checklist, you will safeguard your OU from entering into sponsorship agreements that may not be in the best interest of IEEE. These research ideas are documented best practices collected from our Organizational Units. By following these guidelines, you will help ensure you are working with a reputable organization that will execute a high quality conference.

Overview
There are three initial factors to consider: Fit, Available Resources and Timing.

- 1) Is this opportunity in my field of interest (society) or for a topic OU, is the location within my geographic area?
 - Does the conference topic fit a void where IEEE is not known as a subject matter expert? If yes, this could be an excellent benefit to your membership.
- 2) Does your OU have enough available resources to participate in this conference? If you do not have available resources you should not enter into a sponsorship arrangement.
- 3) Do you have enough lead time to execute a quality conference? Appropriate lead time is required.
 - Does the sponsorship opportunity compete with any existing IEEE or non-IEEE conferences in a particular field of interest or geographic location? If it does, you are reducing the pool of potential attendees which can negatively impact the financial success of any conference.

If the opportunity is the right fit, you have available resources and the timing is right, you should continue your research by utilizing the Non-IEEE Organization – Sponsorship Evaluation Checklist noted below.

If the fit, resources are timing are not satisfactory, you should reconsider if this is the right opportunity for your IEEE OU at this time.



Why do Organizations Approach IEEE for Sponsorship?

- Organizations want their conferences to be aligned with the preeminent collection of engineers and scientists in the world
- The IEEE brand brings immediate credibility to their conference and establishes a high quality expectation for potential attendees
- Their conference will be promoted in IEEE conference search which dramatically increases the organization's reach to potential attendees (increased revenue)
- Conference proceedings are eligible for publishing in Xplore



Why Partner with Organizations

How Sponsors Can Help You

- To increase your conference attendance and revenue
- Community building stimulates convergence of thinking across disciplines.
 - You can bring in closely related scientific areas to broaden the scope and develop more inter-disciplinary tracks
- To obtain additional resources that can aid conference planning and execution
 - Patronage, press releases, space, promotion
- Networking with peers and sharing of technical knowledge
- To learn from others, see how other organizations execute events and conferences
- To spread the risk and total organizing effort

When to Partner with Organizations

- ▶ You should engage with your potential sponsors in the early stages of conference planning
- ▶ It is recommended to engage sponsors after you have already determined:
 - Conference scope
 - Event scale (global, regional, local)
 - Volunteers availability to participate and execute the conference
 - Budget draft is constructed
- ▶ There are situations where you could work with your sponsors on defining scope and the event scale, this typically occurs when you have previously worked with the sponsor
- ▶ After completing a budget draft , you can then determine if there is a need for co-sponsors and/or conference supporters



How to Partner with Organizations

- ▶ Are you aligning the IEEE brand with the appropriate technical or scholarly institutions or associations
 - What is their reputation and brand?
- ▶ Can someone from your OU verify the suitability of an organization as a partner for IEEE
- ▶ **Evaluate** all sponsorship opportunities before agreeing to partner
 - Confirm not-for-profit status, is legal documentation available?



Evaluating Conference Sponsorship Opportunities with Non-IEEE Organizations

Best Practices Step 1

1) FIT
2) RESOURCES
3) TIMING



- Is the opportunity is in your field of interest?
- Does the topic fill a topical niche that is underserved?
- Does the opportunity provide access to a new audience?
- Do you have enough resources to participate in the technical program at minimum?
- Is the conference lead time greater than 12 months in advance of the conference date?
- The conference does compete with any existing IEEE conferences (*potentially dilutes your audience)
- The conference doesn't compete with any non-IEEE conference that are in the same field of interest? *
- **If these conditions are not met, your OU should *not* sponsor this conference. If the fit, available resources and timing is right, continue your evaluation**

Evaluating Conference Sponsorship Opportunities with Non-IEEE Organizations (continued)

Best Practices Step 2

- Review the organization's website and previous conference history
 - Query the leadership team's biographies, review previous conference locations, call for papers and key statistics: acceptance rates, papers/reviewer, reviews/paper
- Have the Non-IEEE organization formally present the opportunity
- Implement an application process to collect previous conference historical data
- If you are unsure if it is the right opportunity, consult with MCE ieee-crm@ieee.org
- **After your assessment is complete, determine if this sponsorship opportunity is the right fit for your conference**
 - Yes proceed, No reject, Not at this time - future potential