



### TIMELINE OF IES MAJORITY SPONSORED CONFERENCES

The standard timeline for IES Majority Sponsored conferences is as follows (this information is summarized in a chart in Appendix C):

- The conference should be approved some 3 years ahead, at the IES AdCom meeting closest in time. Well before that, prospective organizers must contact the IES VP for Conference Activities or the IES VP for Conference Activities, depending on the conference they are willing to organize. The corresponding VP will inform them about years open for bidding and bidding requirements, and will provide guidance and advice in the preparation of the bidding materials.
- The first (optional) milestone is the presentation of an Expression of Interest at an IES Conferences Committee (C-C) meeting held approximately 3.5 years before the target conference dates (the latest possible to comply with the 3-year ahead approval target, taking into account the schedule of IES AdCom meetings).
- A full bid must be submitted for consideration by the 3-year ahead deadline. After conference approval, organizers must regularly submit to and present reports at IES C-C meetings (see Document #2).
- Once the conference is approved by IES, an operating agreement (Appendix A) must be signed by the General Chair of the conference and IES President or IES VP for Conference / Workshop Activities (depending on the conference) (see Document #2).
- After that, the conference has to be registered with IEEE by filling the corresponding IEEE Conference Application Form online<sup>1</sup>. Among other data, this form lists all financial and technical sponsors of the conference. When there are sponsors others than IES, IEEE will generate an MoU to be signed by all parties<sup>2</sup>. Once this is done, the conference is included on the list of IEEE conferences and:
  - ✓ IEEE will request organizers to submit budget and list of members of the conference committees<sup>3</sup>.
  - ✓ General, Finance, and Technical Program Chairs may be required by IEEE to take online classes covering compliance topics related to their position in the conference. The classes must be taken within days of the notification from IEEE.
  - ✓ Organizers must check IEEE conference insurance coverage<sup>4</sup>, to ensure the required conditions are met and to determine if it is necessary to obtain additional coverage.
  - ✓ If a third party (e.g., a conference management company) is to be hired to manage some or all of the administrative / financial workload of the conference, a Management Service Agreement<sup>5</sup> has to be signed between the third party and IEEE.
  - ✓ If the conference is to be held in a venue (such as a conference center or a hotel) with which a contract has to be signed (see Document #4), it must be sent as soon as possible to IEEE.

<sup>1</sup> <https://www.ieee.org/conferences/organizers/conf-app.html>

General Chairs of approved conferences can retrieve the information required to fill the form from IES web

<sup>2</sup> <https://www.ieee.org/conferences/organizers/memorandum-of-understanding.html>

<sup>3</sup> If the list was not submitted when filling the IEEE Conference Application Form. As a reminder, conference committees (and any updates to them) must be reported at the earliest IES C-C meeting (see Document #2).

<sup>4</sup> <https://www.ieee.org/about/volunteers/risk-insurance/conference-insurance.html>

<sup>5</sup> [https://www.ieee.org/content/dam/ieee-org/ieee/web/org/conferences/mce/Master Management Service Agreement \(MMSA\)\\_GDPR May2018.docx](https://www.ieee.org/content/dam/ieee-org/ieee/web/org/conferences/mce/Master_Management_Service_Agreement_(MMSA)_GDPR_May2018.docx)

- ✓ A Conference Publication Form has to be submitted to apply for the IEEE Publication Program<sup>6</sup>. As a result, a Letter of Acquisition (LoA) is obtained, an IEEE Conference Catalog Number and ISBN are assigned to the proceedings, and it will be possible to submit them to IEEE Xplore<sup>®</sup> after the conference. The conference may optionally register for PDF eXpress so authors of accepted papers can check them for IEEE Xplore<sup>®</sup> compliance before final submission. If PDF eXpress is used, authors must be informed that the PDF format checking performed by IES-PCT (see Document #5) is more strict so, even if their papers pass the PDF eXpress checking, they might later be requested to fix some issues.
- ✓ The IEEE Section / IES Chapter where the conference is to be held should be contacted to check their willingness to contribute to the conference in any way.
- At the previous edition of the conference (note that there are annual and biennial IES conferences, so the timeline for them is different in this regard, one or two years ahead respectively):
  - ✓ The Call for Papers must be ready for distribution. Up to this point, committees can be updated (reporting to IES C-C /AdCom for approval). If the list of committee members is updated, it has to be resubmitted to IEEE.
  - ✓ A presentation must be made, typically during the Conference Banquet.
  - ✓ The conference web should be live, with at least the most significant information posted on it, and continuously updated from that moment on.
- One year before the conference (IEEE may request some of the items at an earlier time):
  - ✓ Special Session (Co-)Chairs should start to proactively look for special session proposals. They have to coordinate efforts with IES VPs for Conference / Workshop Activities (depending on the conference), who should promote proposals to be submitted from IES TCs. It is also a good practice to send invitation messages to organizers of successful special sessions in previous editions of the conference.
  - ✓ The General (Co-)Chairs are recommended to start looking for potential keynote speakers no later than here. Prestigious people attending the previous edition of the conference may be good candidates, or may help in identifying good ones. IES Officers will also be available to help identifying potential speakers.
  - ✓ External partners (others than those supporting the conference since the moment it was proposed) must be contacted looking for their support.
  - ✓ The conference bank account should be open (if not done before, e.g., for the advance loan to be deposited; see Document #4) and the details sent to IEEE.
  - ✓ Tax compliance information must be submitted to IEEE.
  - ✓ The General and Finance chairs of the conference must each submit online the Principles of Business Conduct Compliance Certificate and Conflict of Interest Disclosure Statement<sup>7</sup>.
  - ✓ If a contract has been signed with a conference venue, the amount of meeting space (as well as room block and minimum food and beverage expense, if applicable) has to be reviewed and renegotiated if required.
- No later than half a year before the conference:
  - ✓ Conference must start to be active in social networks.
  - ✓ The paper review and submission system (see Document #5) must be open for submission. See Document #9 for timeline adjustments that might be required in IECON, ISIE, and ICIT.
  - ✓ All people involved in the review process must be encouraged to start inviting reviewers as soon as papers are received. In this way, if some reviewers decline the invitation or are not responsive to reminders, there would be more time to invite new ones at least in the case of early submissions.

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<sup>6</sup> <https://www.ieee.org/conferences/organizers/conf-app.html?appName=Publication>  
General Chairs of approved conferences can retrieve the information required to fill the form from IES web

<sup>7</sup> <https://www.ieee.org/about/compliance/conflict-of-interest/coiandpob.html>

- ✓ The registration system (See Document #4) must be set up and tested.
- An ad must be published in IEEE Industrial Electronics Magazine (IEM) announcing the conference. It is recommended to place the ad in the issue of IEM that reaches readers when there is still at least 1 month to the initial submission deadline (see fourth paragraph below). IEM is published quarterly, and it reaches IEEE members typically within the first half of the months of January, April, June, and September. Ad closing dates are typically in February, May, August, and November, but the exact dates must be checked with the Editor-in-Chief.
- The deadline for submitting special session proposal must be defined taking into account that the Special Session (Co-)Chairs need typically a few days to evaluate them and, for those approved, organizers need time to publicize them and attract contributions. Since the initial submission deadline for special session papers is the same as for regular papers, it is recommended to set the deadline for submitting special session proposals no later than one month before the initial submission deadline.
- One month before the initial submission deadline, an email announcement should be sent to the IES database of authors and IEEE eNotice<sup>8</sup>.
- Within the last week before the initial submission deadline, a reminder email should be sent to the IES database of authors and IEEE eNotice. If deemed necessary, a deadline extension may be announced. The extension should not be longer than 2-3 weeks, not to compromise the review process.
- The deadline for initial paper submission must be defined to allow a quality, fair review process to be carried out. It is recommended to set it some 4.5 months before the conference. All people involved in the review process must be encouraged to invite reviewers for papers with pending assignments and last-minute submissions as soon as possible.
- If the conference venue is a hotel and a room block has been committed, from 4 months before the conference on, the hotel should submit weekly reports on room block.
- The review process must be completed no later than one week before the deadline for acceptance / rejection notifications to be sent to authors (see next paragraph). After that, the recommendation / decision procedure defined in Document #2 (Section #2) has to be carried out, accepted / rejected papers marked in the submission system, and email notifications sent to contacting authors.
- Deadline for acceptance / rejection notifications to be sent to authors
  - ✓ It must be defined to give enough time to authors of accepted papers to prepare and submit the final versions of their works and to apply for visas for those requiring to<sup>9</sup>. It is recommended to set it no later than 2.5 months before the conference. Acceptance letters must include accurate and comprehensive information<sup>10</sup> about the next steps to be performed by authors (submission of final version and IEEE copyright form, as well as registration).
  - ✓ At this point, the Technical Program Chair must start working on the program using IES-PCT. A preliminary conference schedule must be posted as soon as possible (highlighting it is preliminary).
  - ✓ If tutorials are included in the conference program (see Document #6), the deadline for submitting proposals can be set the same as that for acceptance / rejection notifications. The reason for this is that once the number of accepted papers is known, it would be possible to have an estimate of conference income and expenses. At this point, the decision can be made about the number of tutorials that can be accommodated in the program, considering available space and budget. It has to be noted that tutorial lecturers are offered a monetary compensation (see Document #4).
  - ✓ Also at this point, organizers must be in contact with IES President-Elect and IES VP for Technical Activities, to ensure IES AdCom and preparatory meetings (if they are going to be held in conjunction with the conference) as well as TC meetings can be properly integrated in the conference program.

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<sup>8</sup> Messages must be sent to IES WIC / IEEE eNotice one week before the target delivery date

<sup>9</sup> Organizers must be ready to send suitable letters to registered people requiring a visa to attend the conference.

<sup>10</sup> IES WIC can provide support for this

- Two months before the conference, if a contract has been signed with a venue, the amount of meeting space (as well as room block and minimum food and beverage expense, if applicable) has to be reviewed and renegotiated if required.
- Before the deadline for submission of final versions of accepted papers (see next paragraph), the conference must have registered for CrossCheck<sup>11</sup>. All final versions of accepted papers must be submitted to CrossCheck for plagiarism checking (see Document #5) before generating the conference proceedings. Authors of papers that would need to be removed from the proceedings because of plagiarism issues must be contacted as soon as possible, giving them the possibility to address these issues.
- The deadline for submission of final versions of accepted papers and completed IEEE copyright form, as well as for authors' registration must be defined as to allow some time to contact authors in case they fail to complete the process on time or the final versions of their papers have format or PDF compliance problems, and for them to react, while having enough time to finalize the conference proceedings, program, and guide/abstracts book on time. It is recommended to set it no later than 1.5 months before the conference. Reminders about pending items must be automatically sent to authors from IES-PCT.
- The conference schedule and program must be posted on the conference web as soon as possible, so authors can plan their trip and contact organizers in case of schedule conflicts. Any updates must be immediately posted.
- As soon as authors' registration data and a full draft program are available, the Technical Program Chair should start sending invitations for session chairs. This process must proceed until all sessions have two confirmed chairs, targeting it to be completed no later than two weeks before the conference.
- One month before the conference, the Finance Chair is recommended submit a pre-conference budget forecast to IES VP Conference / Workshop Activities (depending on the conference) and to IEEE.
- One week before the conference:
  - ✓ Materials must be generated (most of them from PCT): conference proceedings, conference guide/abstracts book, signage, session chair schedule (to be provided to them at registration) and control sheets, badges, welcome reception and banquet tickets, attendance certificates, registration receipts (if they have not been provided electronically at online registration).
  - ✓ The conference app should be operational and available for download.
  - ✓ Logistics should be organized / confirmed for conference space, welcome reception, coffee breaks, lunches, banquet, and audience engagement activities (see Document #6). Also for recording of keynote speeches, panels, and tutorials for which speakers, panelists, and lecturers gave permission to (see Document #6).
- One/two days before the conference
  - ✓ Registration area and materials to be given to attendees at registration must be ready.
  - ✓ Exhibit space (if applicable), information area , and office area must be ready
- During the conference:
  - ✓ Correct operation of the conference app (see Document #5) and continuous availability of online materials (see Document #6) must be continuously monitored.
  - ✓ On-site registration services must be open from half an hour (one hour the first day) before the start of the first sessions in the morning until the end of the last sessions in the afternoon. If tutorials are included in the conference program and they are held the day before conference sessions start, registration services must be available from one hour before the start of the first tutorial.
  - ✓ A control sheet must be provided to the chairs of each session, listing the papers to be presented. Session chairs must marked those as "Show" or "No-show". Conference organizers must assign

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<sup>11</sup> <http://www.ieee.org/publications/rights/cross-check-portal.html>

personnel (typically student volunteers) to distribute, collect, and pass them to the Publication Chair as soon as possible. These volunteers may also be in charge of posting at the entrance of each conference room the details of the session to be held there at the next time slot (if electronic signage is not available in session rooms). They should check five minutes before sessions start that chairs are there. They must notify immediately in case of no-show from chairs, so alternative ones may be found on time.

- ✓ The Publication Chair must start contacting authors of “No-show” papers immediately. These papers will in principle be excluded from the IEEE Xplore® package, but authors must be given the chance to explain themselves. Sometimes there may be a mistake when filling the control sheet, sometimes people could not get the visa on time to attend the conference (they must provide proof of it), or they may have experienced travel delays or cancellations (they must provide proof of it too). Authors will be given one week after the conference is finished to reply to “No-show” messages. After that, a decision on all of these cases must be made.
- ✓ In conferences hosting an IES AdCom meeting, organizers must present an on-site report at it (see Document #2).
- As soon as “No-show” issues have been clarified (i.e., one week after the conference end date), the IEEE Xplore® package must be generated (in accordance to the LoA) and submitted to IEEE. This will ensure timely publication of the proceedings in IEEE Xplore®.
- Organizers of IECON, ISIE, and ICIT must send to the IES VP for Conference Activities, within the week after the conference end date, the list of names and emails of all registered participants, for a post-conference survey to be launched (Appendix D). The list will be used with the sole purpose of conducting the survey. It will be deleted once the survey is completed and those who participated are thanked for it.
- A post-conference news must be submitted as soon as possible to the Society News column of IEEE Industrial Electronics Magazine, where it will be published at no cost.
- One month after the conference, the Finance Chair is recommended to submit a post-conference budget forecast to IES VP Conference / Workshop Activities (depending on the conference) and to IEEE.
- A final report including the “Actual” budget (or, if not yet possible, a final financial estimate<sup>12</sup>) must be presented at the first IES AdCom meeting held after the conference.
- Organizers must work diligently to have the conference closed with IEEE within 6 months after the conference end date:
  - ✓ All pending financial transactions should be completed within one month after the conference.
  - ✓ Submit to IEEE 1099 and 1042 Schedule of Payments forms as well as W-8 and W-9 forms for tax reporting (see Document #4).
  - ✓ After there are no pending financial transactions, surplus must be transferred to IEEE and other sponsors (if applicable), according to the corresponding sponsorship shares. IEEE will inform organizers about the bank account surplus must be sent to, as well as the reference that has to be stated in the wire transfer for it to be correctly processed by IEEE.
  - ✓ If using Concentration Banking (CB), the CB Destroy Check Form must be submitted to IEEE.
  - ✓ If not using CB, once surplus is transferred and, therefore, balance in the bank account is zero, the account must be closed and proof of closure must be submitted to IEEE.
  - ✓ If the bank account was located outside of the US, the payments report must be submitted to IEEE (see Document #4).
  - ✓ The audit must be conducted (see Document #4).

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<sup>12</sup> The “Actual” budget must be submitted as soon as all transactions have been completed.

- ✓ The final financial report must be submitted to IEEE<sup>13</sup> together with Certification of Accuracy<sup>14</sup> (to be signed by General and Finance chairs).
- The year after the conference is held, the General (Co-)Chairs may be contacted by the IES Awards and Honors Committee Chair (who will typically delegate in the IES VP for Conference Activities) in case the conference is eligible to nominate candidates to the IES Best Conference Paper Award for that year. They may also be contacted regarding the IES Best Student Paper Award. In both cases, organizers must diligently cooperate with these very important nomination processes.

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<sup>13</sup> <http://www.ieee.org/conferences/organizers/conf-app.html?pageType=finance>

<sup>14</sup> [https://www.ieee.org/content/dam/ieee-org/ieee/web/org/conferences/certification\\_of\\_accuracy.xls](https://www.ieee.org/content/dam/ieee-org/ieee/web/org/conferences/certification_of_accuracy.xls)