



# Workshop Activities

*IES Conference Organizers Day*

*Washington, DC, USA, October 2018*

# Content



- ▶ Technically Co-sponsored Conferences
- ▶ Daa protection under GDPR

# Technically Co-sponsored Conferences

# What is a TCS conference



- ▶ IES will have direct and substantial involvement in the organization of the technical program but no financial involvement. IES will not get any share of the surplus and it is not expected to contribute to any share of the losses (if any).
- ▶ Ideal for conferences organized by local associations, small to medium research teams, regional events, etc.

# Advantages



Having your conference technically co-sponsored by IES means:

- ▶ The conference will be **associated with IEEE and IES**, and the prospective participants will know in advance of the technical quality implied by this.
- ▶ There is possibility of submitting the published proceedings to the **IEEEXplore digital library**, where they will be available for download. Many people choose conferences to attend only if they are included in IEEEXplore.
- ▶ You will have access to **Submit, the IES paper submission and review system**, thoroughly tested for more than 15 years and that has served more than 100 conferences. It is a complete tool, maintained by IES volunteers, which handles all the steps of the submission and review process.

# IES policy



At IES, we only grant TCS to conferences with a **high technical quality**, and we expect all conferences to adhere to the highest technical and professional standards. Although IES will not be involved in the conference finances, some information about them is also necessary in order to know the functioning of the conference.

# Website for TCS conferences



*<http://www.ieee-ies.org/conferences/tcs-conferences>*

- ▶ Advantages of having IES as TCS
- ▶ Requirements and procedures, step by step
- ▶ Links to application form and to other relevant material

# Requirements



In order to apply to TCS, you will have to show a **team with proven capacity and experience** in organizing conferences, and usually **previous editions** of the same conference must have been successfully held in the past.

When a conference is TCS by IES, the organizers comply to:

- ▶ Guarantee at least **5% discount** in the registration fees for IES members independently of any other IEEE membership discount.
- ▶ Organize a conference of **international character** with keynote speakers and participants from at least three different countries.
- ▶ Include **IES volunteers**, Technical Committees in particular, in the Technical Program Committee and **provide access** to the submitted papers and reviews.

(cont.)

# Requirements (contd.)



- ▶ Contact IEEE Services and IES VP for Membership Activities well before the event for the **setup of a membership desk** during the event. Promote IEEE and **IES membership**.
- ▶ Prepare a final report after the event, regarding the **membership desk results** to be sent to IES VP for Membership Activities .
- ▶ Prepare a **final technical report** after the event, to be sent to IES VP for Workshops including an electronic copy of the proceedings.

# Procedure



- ▶ Determine whether the conference falls within the **fields of interest of IES** (found at IES website). If the conference has similar topics, there should be one or more **IES Technical Committees** that cover them.
- ▶ Identify an **IES liaison** who will be an IES volunteer who will channel the communication between the conference and IES. This person will **overview the conference technical program** (including the review process) and will have access to papers and reviews.
- ▶ Collect information about the **current conference and the previous editions**. You will need data such as: dates and location of next and previous editions; number of submitted and accepted papers; preliminary budget or estimated registration fees; preliminary call for papers.

# Procedure



- ▶ Fill the **TCS Application Form** and submit it. If you have questions about the content, contact Vice President for Workshop Activities (VPWA).
- ▶ The VPWA will review the application and might ask for further information. After all the information is collected, the application will be forwarded to the IES Conferences Committee for further **discussion and voting**.
- ▶ Once the conference is approved, you will receive **notification** with instructions.
- ▶ Fill the **IEEE Conference application form** to register your conference with IEEE. When filling it, include Industrial Electronics Society as "Sponsor (0%)"

# Procedure



- ▶ Include **IEEE and IES logo** on all conference materials. Consider placing an ad in the Industrial Electronics Magazine to publicize the conference, and to use IES social media to disseminate information about it. If you wish to do so, please contact the co-chairs of the IES Students and Young Professionals Committee
- ▶ If you wish so, apply for **Submit**, the IES web-based submission and review system.
- ▶ After conference is over, send the **required reports** including Number of papers submitted/accepted/presented; Results of membership desk in terms of new members recruited; Number of papers sent to Xplore and date you sent the package; Any other information you consider relevant.
- ▶ If you are sending **papers for publication** in IEEEXplore, prepare the packing list as soon as possible and submit electronically

# TCS applications

## Web-based workflow



### Request Technical Co-sponsorship for a conference

IEEE Industrial Electronics Society

[Login](#)

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#### Introduction

Please fill the following fields with the information of the conference. Try to provide as much information as possible, as that will help the IES Conferences Committee to device, but if something is not yet known, leave it blank.

If you have questions about the form or the process, please contact the [Vice President for Workshop Activities](#)

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#### General info

Conference name	<input type="text"/>
Dates	<input type="text"/>
Location (city, country)	<input type="text"/>
Website	<input type="text"/>

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#### Previous editions

Has this conference been conducted before?  Yes  No

If yes, include for each of the three last editions: year

# Data protection under GDPR

# GDPR



## The **General Data Protection Regulation (GDPR)**

(Regulation EU-2016/679)

is a regulation by which the European Parliament, the Council of the European Union, and the European Commission intend to strengthen and unify data protection for all EU citizens and individuals within the European Union (EU).

The GDPR's primary aim is to give control back to citizens and residents over their personal data. Because of its extraterritorial aspects, **international businesses are impacted** by the regulation.

Went into effect on 25 May 2018

# Who does the GDPR apply to?



- ▶ The GDPR applies to organizations established in the EU and to organizations, whether or not established in the EU, that process the personal data of EU individuals.
  - **IEEE meets these qualifications and is subject to the GDPR.**
- ▶ The GDPR protects the personal data of individuals. Examples of personal data include:
  - Name
  - Photo
  - Email address
  - IP Address

# What are Some of the Key Changes?



- ▶ **Right to be Forgotten:** Individuals may require data controller to erase their personal information from databases.
- ▶ **Right to Access/Data Portability:** If asked, Data Controller must provide a copy of personal data in a commonly used and machine readable electronic format.
- ▶ **Breach Notification:** Organizations are now required to report data breaches to regulatory authorities within 72 hours of first becoming aware of the breach.
- ▶ **Privacy and Data Considerations:** Organizations must design systems with privacy in mind from the outset (“Privacy by Design”).
  - Organizations also should only process the data necessary for the completion of their duties, as well as limit access to only those needing this information.
- ▶ **Consent:** The use of personal data now requires “freely given, specific, informed, and unambiguous” consent from individuals.

# What Does Consent Mean?



- ▶ Consent must be opt-in, implied consent/opt-out is no longer viable.
- ▶ Consent to use personal data must be “freely given, specific, informed, and unambiguous.”
- ▶ Organizations must request consent in an intelligible and easily accessible form; legalese terms and conditions will not be acceptable.
- ▶ If personal data will be shared with third parties this must be disclosed to gain effective consent.
- ▶ Consent must be as easy to withdraw as it is to give.

# Why is Compliance Important?



- ▶ Some aspects of the regulation are still being refined, but what's clear now is that the fines for non-compliance are substantial.
- ▶ Organizations can be fined up to **4% of annual global turnover for breaching the GDPR or €20 Million**, whichever is higher. This is the maximum fine that can be imposed for the most serious infringements e.g., deliberate violations, not having sufficient customer consent to process data, or violating the core of Privacy by Design concepts.
- ▶ Regulatory agencies may also be permitted to enforce other penalties such as deletion of personal data and placing limitations on interactions with citizens of EU member states.

# What is IEEE Doing?



- ▶ IEEE has been carefully reviewing its policies and business processes that involve personal data.
- ▶ A cross-organizational task force is working to ensure uniformity in how volunteers, members, and professional staff worldwide collect and use personal data.
- ▶ Developing a global communications plan that will use newsletters, emails, [ieee.org](http://ieee.org), etc. to keep you apprised of any changes in policies and processes as well as the new resources and tools you will have access to.
- ▶ Updating compliance training courses



# What is IEEE Doing? (continued)



- ▶ Existing service agreements are being evaluated to ensure inclusion of GDPR-related terms and conditions
- ▶ Other key business platforms and applications such as conference registration systems, websites, peer review tools, marketing and customer management systems are being evaluated
- ▶ Developing an understanding of future implications for business going forward
- ▶ Moving towards centralized applications and services
- ▶ Improving consent and opt-out capabilities and record keeping

# What Does This Mean to You

## – as an IEEE Volunteer?



- ▶ IEEE values your contributions and cares about making sure you are able to perform your role in a compliant manner.
- ▶ Current processes of collecting personal data and emailing on behalf of IEEE will change. This may include deletion of data currently in your possession.
- ▶ Staff will provide you with new or enhanced tools and/or processes for compliance.
- ▶ Staff will communicate with you regarding training and education shortly. IEEE respects your time and will try to make these communications as efficient and informative as possible.

# What Does This Mean to You – as an IEEE Volunteer? (continued)

## Other areas that will be addressed:

- ▶ IEEE systems and applications
- ▶ Non-IEEE systems and applications
- ▶ Home grown tools and commercial tools for communication
  - Constant Contact, Mail Chimp
  - Places where data resides such as Access databases, Excel spreadsheets,
- ▶ Google Drive, etc.



# What Does This Mean to You

## – as a conference organizer?



**You will be dealing with personal data. You need to be aware of:**

- ▶ What do to in case of data breach
- ▶ How to work with vendors/contractors
- ▶ How to manage email lists
- ▶ Registered people and data provided
- ▶ ...and more

# What to do in case of a data breach



- ▶ GDPR defines a data breach as “a breach of security leading to the accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access to, personal data transmitted, stored or otherwise processed.”
- ▶ Breaches could include a lost or stolen laptop containing personal data, the **accidental emailing of personal data to non-authorized users**, and so on.

# What to do in case of a data breach



## ► What happens if there is a breach?

- Under GDPR, upon becoming aware of a breach, IEEE may have only **72 hours** to notify EU authorities. Rapid action is important.
- In your role as a volunteer, you may be responsible for the collection or processing of personal data. If you detect, or even suspect a data breach, **immediately contact** the IEEE IT Security Team at [privacy@ieee.org](mailto:privacy@ieee.org). They can help assess the situation and react accordingly to notify the proper authorities as needed.

# Working with vendors and suppliers



## ▶ Who is responsible for GDPR compliance when organizing an event?

Responsibility for compliance goes through the **entire event supply chain** – from IEEE as the financial sponsor of the event all the way to the third-party vendors that store and process data.

Event organizers are ultimately responsible, thus IEEE is because we are the legal entity.

This is why it is critical to choose providers that meet GDPR compliance standards. IEEE must show that we are doing our best to protect the personal information of individuals and minimize risks.

# Working with contractors and suppliers

## ▶ Does GDPR apply to event contractors and vendors?

**Yes.** GDPR requirements clearly state that data controllers must show how they are complying with the new regulations. Part of that responsibility is to make sure that all vendors you are dealing with also are fulfilling their legal responsibilities on IEEE's behalf.

# Working with contractors and suppliers

## ► What questions should event organizers keep in mind?

GDPR is an important part of the vendor relationship. It is important to ask vendors how they plan to fulfill their GDPR obligations on behalf of IEEE, including:

- Where is the data hosted?
- What contractual and legal safeguards are in place to protect data?
- Who has access to the data?
- How is the data being used while being processed?
- How does the system delete personal data?
- How quickly can deletion of data be completed?
- What is the vendor's policy regarding data retention?
- How does the system allow IEEE to obtain and store consent?

# Working with contractors and suppliers



- ▶ **Where can I find examples of language I should include in contracts with vendors?**

IEEE has written contractual language to address GDPR and this language has been incorporated into all existing IEEE contract templates. For existing contracts, IEEE has created an appropriate GDPR contract addendum and has begun conducting outreach to these suppliers requesting their acknowledgement of the new GDPR language. To learn more about the contractual language contact [gdpr-mce@ieee.org](mailto:gdpr-mce@ieee.org)

# Communicating your conference



- ▶ **Conferences need to be publicized and socialized, and you are encouraged to do so**

Individuals who have provided consent are eligible for communications regarding IEEE related products and services - membership, products and services, conferences, education, information, publications, etc. provided they have not indicated otherwise by modifying their communication preferences.

Reasonable restraint and common sense email marketing practices should be applied to the frequency of contact.

**This includes participants of previous editions in the conference series if they have participated or on after 1 January 2016.**

# Campaign by mailing lists



- ▶ 1) All communications **must** include a way for individuals to **opt-out/unsubscribe** from the specific communication, which must be tracked by your campaign management system, and therefore, unsubscribes must be removed from the list for future communications.
- ▶ 2) Individuals making a specific request to be removed from general mailing lists should also be removed from the list for future campaigns.
- ▶ 3) 'Hard bounces', where an email message is returned because the recipient's address is invalid, should be removed from the list, each time a campaign is conducted.
  - Delete/purge individuals with 'transactional' history **prior to 31 December 2015** with the conference or IEEE, and no recent activity.

# Campaign by mailing lists



- ▶ 4) Each communication should include a request or link to provide consent to the **IEEE Privacy Policy**.
  - For those using IEEE tools such as BDRS and Marketo, the process is currently available.
  - For those using other marketing tools, the automated capture and collection process is still being developed. If your tool is capable of capturing and holding this information you should do this and we will be rolling out a process for loading this into the IEEE Consent Management System.
- ▶ 5) Volunteers are strongly encouraged to use IEEE BDRS/Marketo or the vTools/eNotice service to manage email campaigns.

# Campaign by mailing lists



- ▶ 6) When sending to non-members, you should inform them of the basis of their presence on your list. For example: "You are receiving this message because of your membership, participation, or interest in the IEEE Conference XXXX"

# DON'T CONTACT



- ▶ Communications should **NOT** be sent to individuals falling into one of the following scenarios.
  - *All scenarios assume that consent to the IEEE Privacy Policy has not been provided by individuals.*
- ▶ 1) Prospects or individuals with NO affiliation, connection or history of interaction with IEEE, should not be communicated with at any time on any topic. **These names should be purged from all lists.**
- ▶ 2) Individuals with 'transactional' history prior to 31 December 2015 with the IEEE unit or conference, and no recent activity.
  - Transactions include: product purchase, conference attendance, authorship, served as a reviewer, participant in Council or Technical Community, signed up for a newsletter, etc. **These names should be purged from all lists.**

# Registration process



- ▶ **What do I need incorporate into the registration process?**
- ▶ All events will be required to incorporate pro-active consent to both the **IEEE Privacy Policy** and **IEEE Event Terms and Conditions** as part of the event registration process to capture and affirm active consent. Acceptance is mandatory as a condition of registration for an event and requires a specific format. To learn more about the format, contact [gdpr-mce@ieee.org](mailto:gdpr-mce@ieee.org). As an example of the language, IEEE has prepared the following:

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Acceptance of IEEE policies are required to register for this event

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By submitting your registration details, you acknowledge that:

**You have read and are in agreement with IEEE's Privacy Policy**

- I accept the IEEE Privacy Policy

**You have read and are in agreement with IEEE's Event Terms and Conditions**

- I accept the Event Terms and Conditions

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# Registration process



- ▶ **Where should these questions be placed during the registration process?**
- ▶ As a rule of thumb, place these questions on a stand-alone page allowing the attendee to focus on these questions as well as ensure they are not lost during the registration process. If possible, place them before the registrant enters any personally identifiable information.

**IEEE GDPR website**  
[www.ieee.org/gdpr](http://www.ieee.org/gdpr)

**Thank you!**