

# How to organize an IEEE Conference: Checklist & Timeline

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

\*The checklist and timeline are designed as guides and based on the planning process of a conference with approximately 200-250 attendees. Please adjust to suit the needs of your individual conference.

		<input checked="" type="checkbox"/> <b>Detailed Conference Checklist</b>			
Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services <b>Bold = Required</b>					
<input checked="" type="checkbox"/>	<b>WHEN</b> <b>actions/tasks</b> <b>should be</b> <b>completed</b> (Recommended Deadlines)	<b>WHAT</b> actions/tasks need to be <b>done</b>	<b>HOW</b> to complete (Required Docs/Templates)	<b>WHERE</b> can I go to access forms, get more information, reference materials and policy?	<b>WHO</b> 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"> <li>• <b>IEEE Societies, Councils and Technical Communities</b>  <a href="http://www.ieee.org/web/societies/home/index.html">http://www.ieee.org/web/societies/home/index.html</a></li> <li>• <b>IEEE Geographic Activities (Regions/Sections/Chapters)</b>  <a href="http://www.ieee.org/web/geo_activities/home/index.html">http://www.ieee.org/web/geo_activities/home/index.html</a></li> <li>• <b>Policy 10.1.2 - Sponsorship</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.2.xml#10.1.2">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.2.xml#10.1.2</a></li> <li>• <b>Conferences Organization Manual - 2.0 Types of Conference Involvement</b>  <a href="http://www.ieee.org/web/conferences/mom/mom_sect2.html">http://www.ieee.org/web/conferences/mom/mom_sect2.html</a></li> </ul>	IEEE Conference Business Services
	24 months BEFORE start date	Obtain sponsorship		<ul style="list-style-type: none"> <li>• <b>Policy 10.1.3 - Inter-organizational Unit Roles &amp; Responsibilities</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.3.xml#10.1.3">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.3.xml#10.1.3</a></li> <li>• <b>Policy 10.1.4 - General Approvals, Endorsements, &amp; Notifications</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.4.xml#10.1.4">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.4.xml#10.1.4</a></li> </ul>	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"> <li>• <b>Policy 10.1.12 - Conference Chairs</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.11.12.13.14.15.xml#10.1.12">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.11.12.13.14.15.xml#10.1.12</a></li> <li>• <b>Conferences Organization Manual - 4.0 Organizing, Planning and Scheduling the Conference</b>  <a href="http://www.ieee.org/web/conferences/mom/mom_sect4.html">http://www.ieee.org/web/conferences/mom/mom_sect4.html</a></li> <li>• <b>Conferences Organization Manual - Sections 6.0-13.0</b>  <a href="http://www.ieee.org/web/conferences/mom/table_of_contents.html">http://www.ieee.org/web/conferences/mom/table_of_contents.html</a></li> </ul>	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"> <li>• <b>IEEE Geographic Activities (Regions/Sections/Chapters)</b>  <a href="http://www.ieee.org/web/geo_activities/home/index.html">http://www.ieee.org/web/geo_activities/home/index.html</a></li> </ul>	IEEE Conference Business Services

<p>Related Areas:</p> <p>Conference Finance</p> <p>Conference Publications</p> <p>Conference Contracts</p> <p>Conference Business Services</p> <p><b>Bold = Required</b></p>		<input checked="" type="checkbox"/> <b>Detailed Conference Checklist</b>			
<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?
	<p>24-18 months BEFORE start date</p> <p><i>As soon as feasible - but no later than 18 months before the conference</i></p>	<p>Register your conference with the IEEE, submit the <b>Conference Information Schedule &amp; Committee List</b> to obtain a conference number, insurance coverage and be listed on the IEEE Conference Search and Call for Papers (CFP) listing.</p> <p><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></p>	<p><b>Conference Information Schedule &amp; Committee List</b></p>	<ul style="list-style-type: none"> <li>• <b>IEEE Conference Information Schedule</b> <a href="http://www.ieee.org/web/conferences/organizers/required_documentation.html">http://www.ieee.org/web/conferences/organizers/required_documentation.html</a></li> <li>• <b>Policy 10.1.4 - General Approvals, Endorsements, &amp; Notifications</b> <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.4.xml#10.1.4">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.4.xml#10.1.4</a></li> <li>• <b>Conference Insurance Information</b> <a href="http://www.ieee.org/web/conferences/organizers/insurance_info.html">http://www.ieee.org/web/conferences/organizers/insurance_info.html</a></li> <li>• <b>Policy 10.1.19 - Conference Insurance</b> <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.19">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.19</a></li> </ul>	<p>IEEE Conference Business Services</p> <p>IEEE Insurance</p>
	<p>24-18 months BEFORE start date</p>	<p>Set forth the relationship and obligations of all involved parties in a <b>Memorandum of Understanding (MOU)</b>, if applicable</p>	<p><b>Memorandum of Understanding (MOU)</b>, if applicable</p>	<ul style="list-style-type: none"> <li>• <b>Memorandum of Understanding (MOU)</b> <a href="http://www.ieee.org/web/conferences/organizers/MOU.html">http://www.ieee.org/web/conferences/organizers/MOU.html</a></li> <li>• <b>Policy 10.1.5 - Memorandum of Understanding/Agreement (MoU/MoA)</b> <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.5.xml#10.1.5">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.5.xml#10.1.5</a></li> </ul>	<p>IEEE Conference Contracts</p>
	<p>24-18 months BEFORE start date</p>	<p>Contract conference management company, if applicable for site selection, registration management, conference logistics or exhibit management</p> <p><b>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.</b></p>	<p><b>Meeting Management Template</b>, if applicable</p>	<ul style="list-style-type: none"> <li>• <b>Templates of Contracts and Legal Documents</b> <a href="http://www.ieee.org/web/conferences/organizers/contracts.html">http://www.ieee.org/web/conferences/organizers/contracts.html</a></li> <li>• <b>Policy 10.1.18 - Contracting</b> <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.16.17.18.xml#10.1.18">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.16.17.18.xml#10.1.18</a></li> </ul>	<p>IEEE Conference Contracts</p>
	<p>24-18 months BEFORE start date</p>	<p>Select site and prepare contract with conference facility/venue and hotels</p> <p><b>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.</b></p>	<p><b>Contracts (Facility/Venue)</b>, if applicable</p>	<ul style="list-style-type: none"> <li>• <b>Templates of Contracts and Legal Documents</b> <a href="http://www.ieee.org/web/conferences/organizers/contracts.html">http://www.ieee.org/web/conferences/organizers/contracts.html</a></li> <li>• <b>Policy 10.1.18 - Contracting</b> <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.16.17.18.xml#10.1.18">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.16.17.18.xml#10.1.18</a></li> <li>• <b>Conferences Organization Manual - 5.0 Site Selection and Hotel Contracts</b> <a href="http://www.ieee.org/web/conferences/mom/all_manual.html#sectoct_5_0">http://www.ieee.org/web/conferences/mom/all_manual.html#sectoct_5_0</a></li> <li>• <b>Conferences Organization Manual - 12.0 The Local Arrangements Committee</b> <a href="http://www.ieee.org/web/conferences/mom/sectoct_12.html">http://www.ieee.org/web/conferences/mom/sectoct_12.html</a></li> </ul>	<p>IEEE Conference Contracts</p>

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	24-18 months BEFORE start date	Review IEEE Insurance coverage and determine if additional coverage is required		<ul style="list-style-type: none"> <li>• <b>Conference Insurance Information</b>  <a href="http://www.ieee.org/web/conferences/organizers/insurance_info.html">http://www.ieee.org/web/conferences/organizers/insurance_info.html</a></li> <li>• <b>Policy 10.1.19 - Conference Insurance</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.19">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.19</a></li> <li>• <b>Conferences Organization Manual - 9.0 The Finance Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_9.html">http://www.ieee.org/web/conferences/mom/sectoct_9.html</a></li> </ul>	IEEE Insurance
	24-18 months BEFORE start date	Review <b>tax information</b> 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"> <li>• <b>Tax Information for IEEE Conferences</b>  <a href="http://www.ieee.org/portal/pages/services/financial/tax/ieeconftaxinfo.html">http://www.ieee.org/portal/pages/services/financial/tax/ieeconftaxinfo.html</a></li> <li>• <b>Policy 10.1.22 - Tax Liability</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.22">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.22</a></li> <li>• <b>Conferences Organization Manual - 9.0 The Finance Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/all_manual.html#sectoct_9_0">http://www.ieee.org/web/conferences/mom/all_manual.html#sectoct_9_0</a></li> </ul>	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"> <li>• <b>IEEE Publicity Guide</b>  <a href="http://www.ieee.org/portal/pages/newsinfo/IEEE_Publicity_Guide.html">http://www.ieee.org/portal/pages/newsinfo/IEEE_Publicity_Guide.html</a></li> <li>• <b>IEEE Entity Web Hosting</b>  <a href="http://www.ewh.ieee.org/">http://www.ewh.ieee.org/</a></li> <li>• <b>IEEE Identity Standards</b> (IEEE Master Brand Usage)  <a href="http://www.ieee.org/web/publications/rights/idstandards.html">http://www.ieee.org/web/publications/rights/idstandards.html</a></li> <li>• <b>Policy 10.1.16 - Naming of IEEE Conferences</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.16.17.18.xml#10.1.16">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.16.17.18.xml#10.1.16</a></li> <li>• <b>Policy 10.1.17 - Use of the IEEE Logo</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.16.17.18.xml#10.1.17">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.16.17.18.xml#10.1.17</a></li> <li>• <b>Policy 10.1.21 - IEEE Services and Publicity</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.20">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.20</a></li> <li>• <b>Conferences Organization Manual - 8.0 The Publicity and Public Relations Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_8.html">http://www.ieee.org/web/conferences/mom/sectoct_8.html</a></li> </ul>	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"> <li>• <b>Conferences Organization Manual - 11.0 The Exhibits Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_11.html">http://www.ieee.org/web/conferences/mom/sectoct_11.html</a></li> </ul>	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"> <li>• <b>Policy 10.1.23 - Financial Support from Industry</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.23.24.25.xml#10.1.23">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.23.24.25.xml#10.1.23</a></li> <li>• <b>Conferences Organization Manual - Sections 7.0, 8.0 and 11.0</b>  <a href="http://www.ieee.org/web/conferences/mom/all_manual.html">http://www.ieee.org/web/conferences/mom/all_manual.html</a></li> </ul>	Previous year's conference committee

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	18-15 months BEFORE start date	Apply for grants for conference support		<ul style="list-style-type: none"> <li>• <b>IEEE Grant Administration</b>  <a href="http://www.ieee.org/portal/pages/services/financial/grants/index.html">http://www.ieee.org/portal/pages/services/financial/grants/index.html</a></li> <li>• <b>Conferences Organization Manual - 9.0 The Finance Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/all_manual.html#sectoc9_0">http://www.ieee.org/web/conferences/mom/all_manual.html#sectoc9_0</a></li> </ul>	IEEE Development Office
	15-12 months BEFORE start date	Develop process/identify system for paper management		<ul style="list-style-type: none"> <li>• <b>Policy 10.1.13 - Confidentiality</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.11.12.13.14.15.xml#10.1.13">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.11.12.13.14.15.xml#10.1.13</a></li> <li>• <b>Policy 10.1.20 - Conference Publications</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.20">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.20</a></li> <li>• <b>Conferences Organization Manual - 7.0 The Publications Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoc7.html">http://www.ieee.org/web/conferences/mom/sectoc7.html</a></li> </ul>	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"> <li>• <b>Conferences Organization Manual - 6.0 The Program Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoc6.html">http://www.ieee.org/web/conferences/mom/sectoc6.html</a></li> <li>• <b>Conferences Organization Manual - 7.0 The Publications Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoc7.html">http://www.ieee.org/web/conferences/mom/sectoc7.html</a></li> </ul>	Previous year's conference committee
	15-12 months BEFORE start date	Establish a Call for Papers (CFP)		<ul style="list-style-type: none"> <li>• <b>Conferences Organization Manual - 6.0 The Program Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoc6.html">http://www.ieee.org/web/conferences/mom/sectoc6.html</a></li> <li>• <b>Conferences Organization Manual - 7.0 The Publications Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoc7.html">http://www.ieee.org/web/conferences/mom/sectoc7.html</a></li> </ul>	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"> <li>• <b>Policy 10.1.13 - Confidentiality</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.11.12.13.14.15.xml#10.1.13">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.11.12.13.14.15.xml#10.1.13</a></li> <li>• <b>Policy 10.1.20 - Conference Publications</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.20">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.20</a></li> <li>• <b>Conferences Organization Manual - 7.0 The Publications Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoc7.html">http://www.ieee.org/web/conferences/mom/sectoc7.html</a></li> </ul>	Previous year's conference committee

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<input checked="" type="checkbox"/>	<p>15-12 months BEFORE start date</p>	<p>Establish a Visa process for international attendees and post on the conference website</p> <p>** Visa processing times vary, encourage attendees to plan ahead.</p>	<p><b>IEEE Conference Visa Request Process</b>  <a href="http://www.ieee.org/web/conferences/organizers/reference_materials.html">http://www.ieee.org/web/conferences/organizers/reference_materials.html</a></p> <p><b>Conferences Organization Manual - 14.0 Transnational Participation</b>  <b>14.2.4 VISA Letters for Participants from Regions 7-10</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_14.html">http://www.ieee.org/web/conferences/mom/sectoct_14.html</a></p> <p><b>U.S. Department of State Bureau of Consular Affairs</b>  <a href="http://travel.state.gov/">http://travel.state.gov/</a></p> <p><b>United States Visas</b>  <a href="http://www.unitedstatesvisas.gov/">http://www.unitedstatesvisas.gov/</a></p> <p><b>Embassy's Consular Section</b>  <a href="http://www.usembassy.gov/">http://www.usembassy.gov/</a></p>	<p>Previous year's conference committee</p>	
<input type="checkbox"/>	<p>15-12 months BEFORE start date</p> <p><i>Earlier submission is strongly recommended</i></p>	<p>Submit conference <b>budget with written approvals from all IEEE financial sponsoring organizational unit(s) (OUs)</b> for headquarter review</p>	<p><b>IEEE Financial Web Form - Budget</b> with written approvals from all IEEE financial sponsoring organizational unit(s) (OUs)</p>	<p><b>Select "IEEE Financial Web Form", Financial Report Type "Budget"</b>  <a href="http://www.ieee.org/web/conferences/organizers/required_documentation.html">http://www.ieee.org/web/conferences/organizers/required_documentation.html</a></p> <p><b>Policy 10.1.6 - Conference Budgets</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.6.xml#10.1.6">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.6.xml#10.1.6</a></p> <p><b>Conferences Organization Manual - 9.0 The Finance Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_9.html">http://www.ieee.org/web/conferences/mom/sectoct_9.html</a></p>	<p>IEEE Conference Finance</p>
<input type="checkbox"/>	<p>15-12 months BEFORE start date</p>	<p><b>General Chair and Finance Chair/Treasurer must complete and submit POBC/COI forms</b></p>	<p><b>Principles of Business Conduct Compliance Certificate and Conflict of Interest Disclosure Statement ((POBC/COI)</b></p> <ul style="list-style-type: none"> <li>▪ General Chair</li> <li>▪ Finance Chair/Treasurer</li> </ul>	<p><b>Principles of Business Conduct and Conflict of Interest</b>  <a href="http://www.ieee.org/web/volunteers/compliance/conflict_of_interest/index.html">http://www.ieee.org/web/volunteers/compliance/conflict_of_interest/index.html</a></p>	<p>IEEE Conference Finance</p>
<input type="checkbox"/>	<p>15-12 months BEFORE start date</p>	<p>Submit updated committee list, if applicable</p>	<p>E-mail to conference-finance@ieee.org</p>	<p>IEEE Conference Finance</p>	

Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services <b>Bold = Required</b>		<input checked="" type="checkbox"/> <b>Detailed Conference Checklist</b>			
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	15-12 months BEFORE start date	Establish <b>conference bank account</b> for receipt and disbursement of conference- funds	<b>IEEE Concentration Banking</b>	<ul style="list-style-type: none"> <li>▪ <b>IEEE Concentration Banking Program</b> <a href="http://www.ieee.org/portal/pages/services/financial/treasury/concentration.html">http://www.ieee.org/portal/pages/services/financial/treasury/concentration.html</a></li> <li>▪ <b>Bank Accounts</b> <a href="http://www.ieee.org/web/conferences/organizers/financial.xml#bank">http://www.ieee.org/web/conferences/organizers/financial.xml#bank</a></li> <li>▪ <b>Policy 10.1.8 - Conference Bank Account Signatures</b> <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.8">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.8</a></li> <li>▪ <b>Conferences Organization Manual - 9.0 The Finance Committee</b> <a href="http://www.ieee.org/web/conferences/mom/sectoct_9.html">http://www.ieee.org/web/conferences/mom/sectoct_9.html</a></li> </ul>	IEEE Conference Finance
			<b>Bank Signature Cards</b> [when local bank is being used]	<ul style="list-style-type: none"> <li>▪ <b>Bank Accounts</b> <a href="http://www.ieee.org/web/conferences/organizers/financial.xml#bank">http://www.ieee.org/web/conferences/organizers/financial.xml#bank</a></li> <li>▪ <b>Policy 10.1.8 - Conference Bank Account Signatures</b> <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.8">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.8</a></li> <li>▪ <b>Conferences Organization Manual - 9.0 The Finance Committee</b> <a href="http://www.ieee.org/web/conferences/mom/sectoct_9.html">http://www.ieee.org/web/conferences/mom/sectoct_9.html</a></li> </ul>	IEEE Concentration Banking
			<b>Fiscal Agent (Bank MOU)</b> [for 3rd party ledger accounts]	<ul style="list-style-type: none"> <li>▪ <b>Fiscal Agent MOU (Formerly Banking MOU)</b> <a href="http://www.ieee.org/web/conferences/organizers/MOU.html">http://www.ieee.org/web/conferences/organizers/MOU.html</a></li> <li>▪ <b>Bank Accounts</b> <a href="http://www.ieee.org/web/conferences/organizers/financial.xml#bank">http://www.ieee.org/web/conferences/organizers/financial.xml#bank</a></li> <li>▪ <b>Policy 10.1.8 - Conference Bank Account Signatures</b> <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.8">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.8</a></li> <li>▪ <b>Conferences Organization Manual - 9.0 The Finance Committee</b> <a href="http://www.ieee.org/web/conferences/mom/sectoct_9.html">http://www.ieee.org/web/conferences/mom/sectoct_9.html</a></li> </ul>	IEEE Conference Finance
	<i>The sole sponsor and co-sponsoring organizational units may issue advances to their conferences anytime during its life cycle. <b>**Up to the conference start date</b></i>	Request and obtain loan from sponsoring organizational unit (OU), if needed		<ul style="list-style-type: none"> <li>▪ <b>Policy 10.1.7 - Conference Advances</b> <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.7">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.7</a></li> <li>▪ <b>Conferences Organization Manual - 9.0 The Finance Committee</b> <a href="http://www.ieee.org/web/conferences/mom/sectoct_9.html">http://www.ieee.org/web/conferences/mom/sectoct_9.html</a></li> </ul>	IEEE Conference Finance

<input checked="" type="checkbox"/> <b>Detailed Conference Checklist</b>					
Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services <b>Bold = Required</b>					
<input checked="" type="checkbox"/>	<b>WHEN</b> <b>actions/tasks</b> <b>should be</b> <b>completed</b> (Recommended Deadlines)	<b>WHAT</b> actions/tasks need to be done	<b>HOW</b> to complete (Required Docs/Templates)	<b>WHERE</b> can I go to access forms, get more information, reference materials and policy?	<b>WHO</b> can I contact if I have questions?
	Submit <b>Pre- and Post-Conference forecasts</b> by November 30th of each calendar year for accrual purposes.	Submit <b>Pre- and Post- Conference forecasts</b>		<ul style="list-style-type: none"> <li>• <b>Select "IEEE Financial Web Form", Financial Report Type "Pre-Conference forecast" and/or "Post-Conference forecast"</b>  <a href="http://www.ieee.org/web/conferences/organizers/required_documentation.html">http://www.ieee.org/web/conferences/organizers/required_documentation.html</a></li> <li>• <b>Policy 10.1.6 - Conference Budgets</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.6.xml#10.1.6">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.6.xml#10.1.6</a></li> <li>• <b>Conferences Organizational Manual - 9.0 The Finance Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/all_manual.html#sectoct_9_0">http://www.ieee.org/web/conferences/mom/all_manual.html#sectoct_9_0</a></li> </ul>	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.	<b>W-8 &amp; W-9 Forms</b>	<ul style="list-style-type: none"> <li>• <b>Forms W-8 &amp; W-9</b>  <a href="http://www.ieee.org/portal/pages/services/financial/tax/othertaxsubjects.html#Forms%20W-8%20&amp;%20W-9">http://www.ieee.org/portal/pages/services/financial/tax/othertaxsubjects.html#Forms%20W-8%20&amp;%20W-9</a></li> <li>• <b>Conferences Organization Manual - 9.0 The Finance Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/all_manual.html#sectoct_9_0">http://www.ieee.org/web/conferences/mom/all_manual.html#sectoct_9_0</a></li> </ul>	IEEE Conference Finance
	<b>No later than January 10th of each year for all payments made in the previous calendar year</b>	<b>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".</b>	<b>1099 &amp; 1042 Schedule of Payments</b>	<ul style="list-style-type: none"> <li>• <b>1099 &amp; 1042 Schedule of Payments MS-Excel</b>  <a href="http://www.ieee.org/web/conferences/organizers/required_documentation.html">http://www.ieee.org/web/conferences/organizers/required_documentation.html</a></li> </ul>	IEEE Conference Finance
	<b>No later than January 10th of each year for all payments made in the previous calendar year</b>	<b>Submit annual report on foreign bank accounts to IEEE Tax Dept.</b>		<ul style="list-style-type: none"> <li>• <b>Conferences Organization Manual - 9.0 The Finance Committee 9.1.1.4 IEEE Requirements</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_9.html">http://www.ieee.org/web/conferences/mom/sectoct_9.html</a></li> </ul>	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"> <li>• <b>Conferences Organization Manual - 11.0 The Exhibits Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_11.html">http://www.ieee.org/web/conferences/mom/sectoct_11.html</a></li> </ul>	Previous year's conference committee

<div style="background-color: #d9ead3; padding: 2px;">Related Areas:</div> <div style="background-color: #f1c232; padding: 2px;">Conference Finance</div> <div style="background-color: #f1c232; padding: 2px;">Conference Publications</div> <div style="background-color: #d9ead3; padding: 2px;">Conference Contracts</div> <div style="background-color: #f1c232; padding: 2px;">Conference Business Services</div> <div style="padding: 2px;"><b>Bold = Required</b></div>		<input checked="" type="checkbox"/> <b>Detailed Conference Checklist</b>			
<input checked="" type="checkbox"/>	<b>WHEN</b> actions/tasks should be completed (Recommended Deadlines)	<b>WHAT</b> actions/tasks need to be done	<b>HOW</b> to complete (Required Docs/Templates)	<b>WHERE</b> can I go to access forms, get more information, reference materials and policy?	<b>WHO</b> 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"> <li>• <b>Conferences Organization Manual - 12.0 The Local Arrangements Committee</b> <a href="http://www.ieee.org/web/conferences/mom/sectoct_12.html">http://www.ieee.org/web/conferences/mom/sectoct_12.html</a></li> </ul>	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 <b>Conference Publication Form</b> 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	<b>Conference Publication Form</b>	<ul style="list-style-type: none"> <li>• <b>IEEE Conference Publication Form</b> <a href="http://www.ieee.org/web/conferences/organizers/required_documentation.html">http://www.ieee.org/web/conferences/organizers/required_documentation.html</a> <a href="http://www.ieee.org/portal/pages/pubs/confpubcenter/instructions.html">http://www.ieee.org/portal/pages/pubs/confpubcenter/instructions.html</a></li> <li>• <b>Policy 10.1.20 - Conference Publications</b> <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.20">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.19.20.21.22.xml#10.1.20</a></li> <li>• <b>Conferences Organization Manual - 7.0 The Publications Committee</b> <a href="http://www.ieee.org/web/conferences/mom/sectoct_7.html">http://www.ieee.org/web/conferences/mom/sectoct_7.html</a></li> </ul>	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	<b>IEEE PDF eXpress (optional)</b>	<ul style="list-style-type: none"> <li>• <b>IEEE PDF eXpress</b> <a href="http://www.ieee.org/portal/pages/pubs/confstandards/pdfexpress/index.html">http://www.ieee.org/portal/pages/pubs/confstandards/pdfexpress/index.html</a></li> </ul>	IEEE Conference Publications
	12-9 months BEFORE start date	Register for <b>Electronic IEEE Copyright Form (eCF)</b> if proceedings are acquired by the IEEE	<b>Electronic IEEE Copyright Form (eCF)</b>	<ul style="list-style-type: none"> <li>• <b>IEEE Copyright Form</b> <a href="http://www.ieee.org/web/publications/rights/copyrightmain.html">http://www.ieee.org/web/publications/rights/copyrightmain.html</a></li> <li>• <b>Policy 6.3.1 - IEEE Copyright Policies</b> <a href="http://www.ieee.org/web/aboutus/whatis/policies/p6-3.html#Policies">http://www.ieee.org/web/aboutus/whatis/policies/p6-3.html#Policies</a></li> <li>• <b>Conferences Organization Manual - 7.0 The Publications Committee</b> <a href="http://www.ieee.org/web/conferences/mom/sectoct_7.html">http://www.ieee.org/web/conferences/mom/sectoct_7.html</a></li> </ul>	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"> <li>• <b>Conferences Organization Manual - 7.0 The Publications Committee</b> <a href="http://www.ieee.org/web/conferences/mom/sectoct_7.html">http://www.ieee.org/web/conferences/mom/sectoct_7.html</a></li> </ul>	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"> <li>• <b>IEEE e-Notice</b> <a href="http://www.ieee.org/organizations/vols/e-notice/">http://www.ieee.org/organizations/vols/e-notice/</a></li> </ul>	IEEE Conference Business Services

Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services <b>Bold = Required</b>		<input checked="" type="checkbox"/> <b>Detailed Conference Checklist</b>			
<input checked="" type="checkbox"/>	<b>WHEN</b> <b>actions/tasks</b> <b>should be</b> <b>completed</b> (Recommended Deadlines)	<b>WHAT</b> actions/tasks need to be <b>done</b>	<b>HOW</b> to complete (Required Docs/Templates)	<b>WHERE</b> can I go to access forms, get more information, reference materials and policy?	<b>WHO</b> 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 <b>Payment Card Industry (PCI) compliant</b> . Request IEEE membership verification CD to confirm valid IEEE Members.		<ul style="list-style-type: none"> <li>• <b>IEEE Credit Card Processing</b>  <a href="http://www.ieee.org/web/conferences/organizers/reference_materials.html">http://www.ieee.org/web/conferences/organizers/reference_materials.html</a></li> <li>• <b>Policy 10.1.15 - Registration Fee Requirements</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.11.12.13.14.15.xml#10.1.15">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.11.12.13.14.15.xml#10.1.15</a></li> <li>• <b>Conferences Organization Manual - 13.0 The Registration Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_13.html">http://www.ieee.org/web/conferences/mom/sectoct_13.html</a></li> <li>• <b>IEEE Membership Verification CD</b>  <a href="http://www.ieee.org/web/conferences/organizers/ieememberverification.html">http://www.ieee.org/web/conferences/organizers/ieememberverification.html</a></li> </ul>	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"> <li>• <b>Conferences Organization Manual - 12.0 The Local Arrangements Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_12.html">http://www.ieee.org/web/conferences/mom/sectoct_12.html</a></li> </ul>	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"> <li>• <b>Conferences Organization Manual - 12.0 The Local Arrangements Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_12.html">http://www.ieee.org/web/conferences/mom/sectoct_12.html</a></li> </ul>	Previous year's conference committee
	6-4 months BEFORE start date	Launch registration site		<ul style="list-style-type: none"> <li>• <b>Conferences Organization Manual - 13.0 The Registration Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_13.html">http://www.ieee.org/web/conferences/mom/sectoct_13.html</a></li> </ul>	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"> <li>• <b>Conferences Organization Manual - 6.0 The Program Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_6.html">http://www.ieee.org/web/conferences/mom/sectoct_6.html</a></li> <li>• <b>Conferences Organization Manual - 7.0 The Publications Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_7.html">http://www.ieee.org/web/conferences/mom/sectoct_7.html</a></li> </ul>	Previous year's conference committee
	6-4 months BEFORE start date	Create and publish advanced program		<ul style="list-style-type: none"> <li>• <b>Conferences Organization Manual - 7.0 The Publications Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_7.html">http://www.ieee.org/web/conferences/mom/sectoct_7.html</a></li> </ul>	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"> <li>• <b>Conferences Organization Manual - 7.0 The Publications Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_7.html">http://www.ieee.org/web/conferences/mom/sectoct_7.html</a></li> </ul>	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"> <li>• <b>Conferences Organization Manual - 7.0 The Publications Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_7.html">http://www.ieee.org/web/conferences/mom/sectoct_7.html</a></li> </ul>	IEEE Conference Publications

<input checked="" type="checkbox"/> <b>Detailed Conference Checklist</b>				
<b>WHO can I contact if I have questions?</b>				
<b>WHERE can I go to access forms, get more information, reference materials and policy?</b>				
<b>HOW to complete (Required Docs/Templates)</b>				
<b>WHAT actions/tasks need to be done</b>				
<b>WHEN actions/tasks should be completed (Recommended Deadlines)</b>				
<input checked="" type="checkbox"/>	<p>Related Areas:            Conference Finance            Conference Publications            Conference Contracts            Conference Business Services  <b>Bold = Required</b></p>			
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		<ul style="list-style-type: none"> <li>• <b>Conferences Organization Manual - 11.0 The Exhibits Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_11.html">http://www.ieee.org/web/conferences/mom/sectoct_11.html</a></li> </ul>	Previous year's conference committee
4-3 months BEFORE start date	Request weekly reports from hotel(s) regarding rooms		<ul style="list-style-type: none"> <li>• <b>Conferences Organization Manual - 12.0 The Local Arrangements Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_12.html">http://www.ieee.org/web/conferences/mom/sectoct_12.html</a></li> </ul>	Your Hotel(s)
2 months BEFORE start date	Review room block with hotel(s) against attendance and contract(s)		<ul style="list-style-type: none"> <li>• <b>Conferences Organization Manual - 12.0 The Local Arrangements Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_12.html">http://www.ieee.org/web/conferences/mom/sectoct_12.html</a></li> </ul>	Your Hotel(s)
2 months BEFORE start date	Complete & print final program, advertising/publicity and registration reminders.		<ul style="list-style-type: none"> <li>• <b>Conferences Organization Manual - 6.0 The Program Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_6.html">http://www.ieee.org/web/conferences/mom/sectoct_6.html</a></li> <li>• <b>Conferences Organization Manual - 7.0 The Publications Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_7.html">http://www.ieee.org/web/conferences/mom/sectoct_7.html</a></li> <li>• <b>Conferences Organization Manual - 8.0 Publicity &amp; Public Relations Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_8.html">http://www.ieee.org/web/conferences/mom/sectoct_8.html</a></li> </ul>	Previous year's conference committee
2 months BEFORE start date	Develop & finalize volunteer job functions/onsite needs.		<ul style="list-style-type: none"> <li>• <b>Conferences Organization Manual - 12.0 The Local Arrangements Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_12.html">http://www.ieee.org/web/conferences/mom/sectoct_12.html</a></li> </ul>	Previous year's conference committee
6-4 weeks BEFORE start date	Deadline for early registration (predetermined date)		<ul style="list-style-type: none"> <li>• <b>Conferences Organization Manual - 13.0 The Registration Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_13.html">http://www.ieee.org/web/conferences/mom/sectoct_13.html</a></li> </ul>	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).		<ul style="list-style-type: none"> <li>• <b>Conferences Organization Manual - 12.0 The Local Arrangements Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoct_12.html">http://www.ieee.org/web/conferences/mom/sectoct_12.html</a></li> </ul>	Previous year's conference committee
6-4 weeks BEFORE start date	Ship final program to conference site			Your Conference Site (Facility/Venue)

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

Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services <b>Bold = Required</b>		<input checked="" type="checkbox"/> <b>Detailed Conference Checklist</b>			
<input checked="" type="checkbox"/>	<b>WHEN</b> <b>actions/tasks</b> <b>should be</b> <b>completed</b> (Recommended Deadlines)	<b>WHAT</b> actions/tasks need to be done	<b>HOW</b> to complete (Required Docs/Templates)	<b>WHERE</b> can I go to access forms, get more information, reference materials and policy?	<b>WHO</b> can I contact if I have questions?
	1 month AFTER end date	<b>Repay all loans</b>		<ul style="list-style-type: none"> <li>• <b>Policy 10.1.7 - Conference Advances</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.7">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.7</a> </li> </ul>	IEEE Conference Finance
	1 month AFTER end date	Submit <b>Post-Conference forecast</b>		<ul style="list-style-type: none"> <li>• <b>Select "IEEE Financial Web Form", Financial Report Type "Post-Conference forecast"</b>  <a href="http://www.ieee.org/web/conferences/organizers/required_documentation.html">http://www.ieee.org/web/conferences/organizers/required_documentation.html</a> </li> <li>• <b>Policy 10.1.6 - Conference Budgets</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.6.xml#10.1.6">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.6.xml#10.1.6</a> </li> <li>• <b>Conferences Organizational Manual - 9.0 The Finance Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/all_manual.html#sectoc_9_0">http://www.ieee.org/web/conferences/mom/all_manual.html#sectoc_9_0</a> </li> </ul>	IEEE Conference Finance
	3 months AFTER end date	<b>Distribute surplus</b>		<ul style="list-style-type: none"> <li>• <b>Policy 10.1.9 - Distribution of Surplus and Deficits</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.9">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.9</a> </li> </ul>	IEEE Conference Finance
	3 months AFTER end date	<b>Close conference bank account &amp; submit proof of account closure</b>	<b>Closing of Bank Accounts/Destroy Unused Checks Form for Concentration Banking Accounts</b>	<ul style="list-style-type: none"> <li>• <b>Concentration Banking Destroy Check form</b> (if Concentration Banking was used)  <a href="http://www.ieee.org/web/conferences/organizers/required_documentation.html">http://www.ieee.org/web/conferences/organizers/required_documentation.html</a> </li> <li>• <b>Policy 10.1.8 - Conference Bank Account Signatures</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.8">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.8</a> </li> <li>• <b>Conferences Organization Manual - 9.0 The Finance Committee</b>  <a href="http://www.ieee.org/web/conferences/mom/all_manual.html#sectoc_9_0">http://www.ieee.org/web/conferences/mom/all_manual.html#sectoc_9_0</a> </li> </ul>	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"> <li>• <b>Requirements for Audits of Conference Financial Activities</b>  <a href="http://www.ieee.org/web/conferences/organizers/closing_and_post.html#audit">http://www.ieee.org/web/conferences/organizers/closing_and_post.html#audit</a> </li> <li>• <b>Policy 10.1.10 - Auditing of Conference Finances</b>  <a href="http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.10">http://www.ieee.org/web/aboutus/whatis/policies/p10-1.7.8.9.10.xml#10.1.10</a> </li> <li>• <b>Conferences Organization Manual - 10.0 Conference Audits</b>  <a href="http://www.ieee.org/web/conferences/mom/sectoc_10.html">http://www.ieee.org/web/conferences/mom/sectoc_10.html</a> </li> </ul>	IEEE Conference Finance  IEEE Operations (Internal) Audit
	3-6 months AFTER end date	Submit <b>final financial report with Certification of Accuracy</b>	<b>Final Financial &amp; Certification of Accuracy</b>	<ul style="list-style-type: none"> <li>• <b>Select "IEEE Financial Web Form", Financial Report Type "Final"</b>  <a href="http://www.ieee.org/web/conferences/organizers/required_documentation.html">http://www.ieee.org/web/conferences/organizers/required_documentation.html</a> </li> </ul>	IEEE Conference Finance

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

Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services <b>Bold = Required</b>
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## 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												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	HOLD CONFERENCE			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 <b>Conference Publication Form</b> to obtain Letter of Acquisition (LOA)	Create registration form and ensure registration service is <b>Payment Card Industry (PCI) compliant</b>	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				<b>Onsite Registration</b>  <b>Monitor Budget</b>  <b>Monitor Daily Activities</b>  <b>Hold Post-Conference Wrap Up Meeting</b>			Submit Conference Proceedings/Content (Xplore CD and other media types) per LOA		
	Contact the local IEEE Section	Send request for proposal (RFP) to exhibit decorators and develop exhibitor prospectus, if applicable	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.	Organize and prepare for production of conference publications per Letter of Acquisition (LOA)	Complete and print final program, advertising/publicity and registration reminders	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								
	Register your conference, submit <b>Conference Information Schedule &amp; Committee List</b>	Begin outreach to educational institutions, corporations, government and industry for support and patronage	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	Order attendee giveaways, speaker gifts, and/or conference shirts	Develop and finalize volunteer job functions/onsite needs.	Ship final program to conference site	Submit <b>Pre-Conference forecast</b>	Committee members submit final statistics and lessons learned to OU	Registration clean up (process refunds, receipts and balances due)	Process outstanding bills	Repay all Loans				Submit final financial report with Certification of Accuracy		
	Submit <b>Memorandum of Understanding (MOU), if applicable</b>	Apply for grants for conference support	Update conference website with page/link about CFP information	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	Request weekly reports from hotels on room block.													
	Contract conference management company, if applicable		Establish a Visa process for international attendees and post on the conference website																	
	Site selection and <b>contract review, if applicable</b>		Submit conference budget with written IEEE OU approval(s) for headquarter review																	
	Review IEEE Insurance coverage and determine if additional coverage is required		Submit <b>Principles of Business Conduct Compliance Certificate and Conflict of Interest Disclosure Statement (POBC/COI)</b> forms																	
	Review tax information to ensure IRS and international compliance VAT and GST		Submit updated committee list																	
			Establish <b>conference bank account(s)</b>																	
	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																		

**TIMELINE KEY**

- Conference Finance
- Conference Publications
- Conference Contracts
- Conference Business Services

**Boldface = Required**

\*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