


CONFERENCE TIMELINE

| PRE - CONFERENCE | | | | | | | | | | | | | HOLD CONFERENCE | POST - CONFERENCE | | | | | | |
|--|---|---|--|---|--|--|--|--|--|---|---|---|---|---|--|---|--|---|--|--------------|
| 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 | 1 WEEK | 3 WEEKS | 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 | <i>Register your conference submit Conference Application and approve MOU</i> | Contact IEEE Section where conference will be held. | Develop communications plan, marketing materials and conference website | Develop paper management process or identify system vendor | Develop technical program, establish paper submission process and deadlines | Create website for paper submissions. Work with paper management company, if applicable | Plan social activities and tour program, if applicable | Complete paper review process. Finalize technical program. Notify speakers | Solicit bids from proceedings production vendors based on accepted papers | Review room block with hotel against attendance and contracts | Deadline for early registration | Confirm onsite logistics with venue | Onsite Registration | Submit Conference Proceedings/Content (Xplore CD and other media types) per LOA | | | Distribute surplus | Prepare and submit all audit material. Audit required for IEEE OU total is >50% and budgeted income or expenses > USD\$250K | |
| | Engage with IEEE MCE for conference education, guidance, services and tools. | Submit conference committee list and initial budget forecast to Conference Business Operations | Submit Conference Publication Form to obtain Letter of Acquisition (LOA), IF publishing with IEEE | Send request for proposal (RFP) to exhibit decorators and develop exhibitor prospectus, if applicable | Establish a Call For Papers (CFP) | Update conference website with page/link about CFP information | Obtain permission from related IEEE OUs to market to their members using e-Notice | Send out RFPs for ground transportation and finalize contract, if applicable | Create and post advance program on conference website | Order attendee giveaways, speaker gifts, and/or conference shirts | Send final program, advertising, publicity and registration reminders | Preliminary specifications to conference site. Order signage and recognition products | Set-up registration area, exhibit space, information booth, office area | Monitor Budget | Committee members submit final statistics and lessons learned to OU | Registration clean up: process refunds, receipts and balances due | Process outstanding bills | Close conference bank account; submit proof of account closure | | |
| | | Review IEEE Insurance coverage and determine if additional coverage is required | Register for Electronic IEEE Copyright Form (eCF) if proceedings are acquired by IEEE | Begin outreach to educational institutions, corporations, government and industry for support and patronage | Establish a Visa process for international attendees and post on the conference website | Meet with previous year's committee to discuss best practices | Establish registration process and ensure registration service is Payment Card Industry (PCI) compliant | Launch registration site | Determine preliminary exhibitor space assignments, if applicable | Request weekly reports from hotels on room block | Develop and finalize volunteer job functions and onsite needs. | Submit Pre-Conference budget forecast | | Monitor Daily Activities | | | Repay all Loans | Submit final financial report with Certification of Accuracy | | |
| | | Review tax information to ensure IRS and international compliance VAT and GST | Register for PDF eXpress (optional) | Apply for grants for conference support | Submit conference budget with written IEEE OU approval(s) for headquarter review | Establish conference bank account(s) | | | | Organize and prepare for production of conference publications per Letter of Acquisition (LOA) | Complete paper review process. Finalize technical program. Notify speakers. | Ship final program to conference site | | Hold Post-Conference Wrap Up Meeting | | | Submit Post-Conference forecast | | | |
| | | Contract conference management company, if applicable | Site selection and contract review, if applicable | | Submit Principles of Business Conduct Certificate and Conflict of Interest Disclosure Statement | Submit updated committee list | | | | | | | | | | | | | | |
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| IEEE MCE Customer Relations & Operations | | | | | | | | | | | | | | Your Single Point of Contact Team! ieee-mce@ieee.org | | | | | | |
| | | | | | | | | | | | | | | Request and obtain loan from OU, if needed | | | | | | |
| | | | | | | | | | | | | | | Initial, Pre-and Post Conference forecasts [Submit Pre- and Post- Conference forecasts by November 30th of each calendar year for accrual purposes.] | | | | | | |
| | | | | | | | | | | | | | | 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.] | | | | | | |
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| *NOTE: This timeline is illustrative and for planning purposes only. Each conference plan and timing is unique. © IEEE 2015 All rights reserved | | | | Promote CFP and exhibit prospectus at current year's conference, if applicable | Review and reconfirm hotel, meeting space and room block |  | | | | | | | Timeline Key: Financial Actions Technical Program Actions Conference Publications Actions Boldfaced = Required | | | | | | | |
| PRE - CONFERENCE | | | | | | | | | | | | | | POST - CONFERENCE | | | | | | |