



Developing a Section Event

2015 IEEE-USA Annual Meeting
Eventful Meetings
15 May 2015

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**IEEE MEETINGS,
CONFERENCES & EVENTS**


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Event Planning Process

NEED ASSESSMENT /
IDEA DEVELOPMENT


PLANNING,
REVIEW &
APPROVAL

EVENT
PRODUCTION

- Identify Target Audience
- Confirm Audience Needs
- Review Section Goals
- Assess Section Resources
- Develop Ideas
- Determine Event Type
- Decide on Format

- Develop Preliminary Plan:
 - *Timeline*
 - *Success Criteria*
 - *Budget*
- Assess Feasibility
- Test for Interest
- Obtain Section Approval & Sponsorship

- Confirm Topic /Scope
- Find Speakers / Authors
- Plan and Make Arrangements:
 - *Venue*
 - *F&B*
 - *A/V*
 - *Registration*
- Market & Promote the Event
- Produce Your Event
- Post Event Close-Out

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Defining a Target Audience

- Understand your Section membership composition
 - Demographics, scientific interests, etc.
 - Students, Young Professionals, mid-career, etc.
 - How large are definable groups? Are they at risk?
- What are their interests and needs?
 - Continuing education, skill development, career growth/obsolescence, networking, etc.
- Can you fulfill their needs?
- How will you identify and communicate with them?

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How Do You Identify Needs?

- Industry, Policy & Technology Trends
- Evaluate economic conditions, including technology industry
- MGA Survey Data
- Surveys or Requests from Section members
- Guidance from other IEEE Sections, IEEE-USA and MCE

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Member Needs 2013 Section Vital Survey

- | | |
|---|--|
| 1. Involvement with Local Industry | 7. Opportunity to Participate in Online Webinars |
| 2. Professional Networking | 8. Participate in Joint Events with other Professional Organizations |
| 3. Participation in Conferences | 9. Participating in a career related program |
| 4. Supporting Student Branch Activities | 10. Local leadership training |
| 5. Keeping Section Web Sites Current | |
| 6. Participating in IEEE continuing education | |

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Student Member Needs

- Opportunities for Professional Networking
- Local meetings with other Professionals
- Online Career Resources
- Interaction with other Members
- Online Meetings/Webinars
- Awards and Scholarships
- Humanitarian applications of engineering and technology

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Section Assessment

- Section goals & objectives?
 - Member retention
 - Member growth
 - Student support
 - Generate funds for additional activities
 - Other
- Available Section assets and resources?
 - Financial
 - Volunteer
 - Venue
 - Local experts
 - Industry
 - Government
 - Other

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Develop Event Ideas

- Identify priority audience and need
- Select topic of highest interest
- Decide on format that best fulfills the objective:
 - Conference
 - Education
 - Seminar
 - Other
- Estimate resources required
 - Budget
 - People

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Planning, Review and Approval

- Develop Preliminary Plan:
 - *Timeline / Project Plan*
 - *Success Criteria*
 - *Budget*
- Assess Feasibility
- Test for Interest
- Obtain Section Approval & Sponsorship

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Event Production

- Confirm Topic & Format
 - Find Speakers
- Plan and Make Arrangements:
 - *Venue*
 - *F&B*
 - *A/V*
 - *Registration*
- Market & Promote the Event
- Produce Your Event
- Post Event Close-Out

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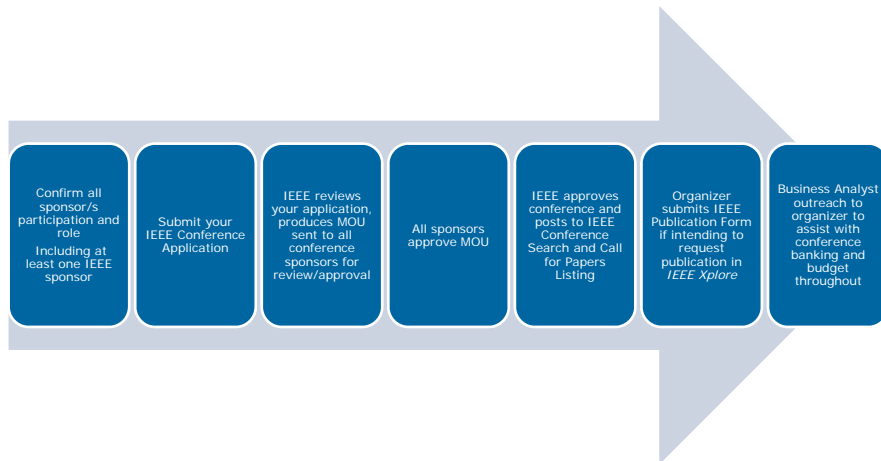
Questions



IEEE Conference Application Review and Approval



Conference Application Timeline



Top Five Keys When Submitting a Conference Application

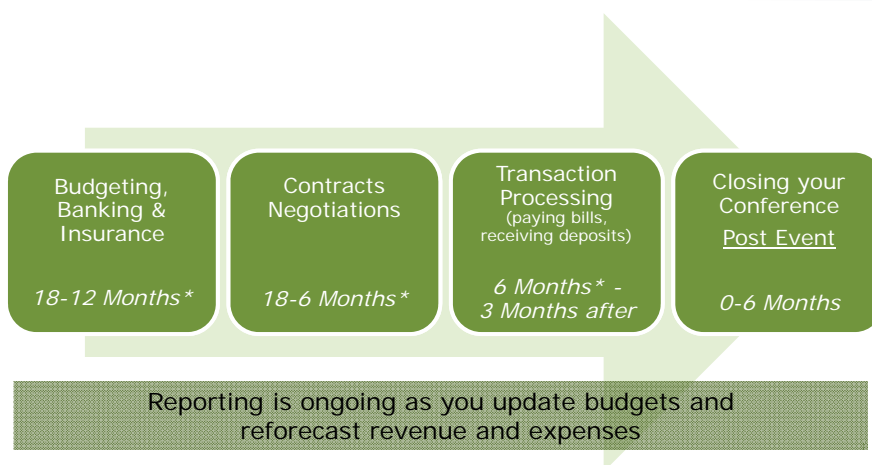
1. Prior to completing the Conference Application, contact all prospective IEEE OUs to discuss sponsorship before you finalize agreements with other non-IEEE sponsors.
 - *Be sure to follow the sponsorship approval guidelines for each IEEE OU, as the **process and timing for securing sponsorship varies across OUs***
2. Reach agreement and understanding with all sponsors regarding roles and responsibilities
3. Have the information needed for the conference application on-hand before you start the process
4. Review and Approve MOU using the electronic approval process
5. Review and take action on the information provided in the Congratulations letter, sent following approval



Event Finances



Event Finance Timeline



*Prior to conference start date



Top Five Keys to Event Financial Management

1. Use sound business judgment and practices
2. Understand all fiscal responsibilities and risk
3. Reforecast whenever needed and communicate updates to committee members
4. Keep good financial records
 - Regular entry of expenses and receipts
 - Transaction level detail is critical
5. Avoid cash, unless absolutely necessary
 - Deposit receipts frequently
 - Obtain receipts for payments



Summary of Required Finance Actions for Conferences

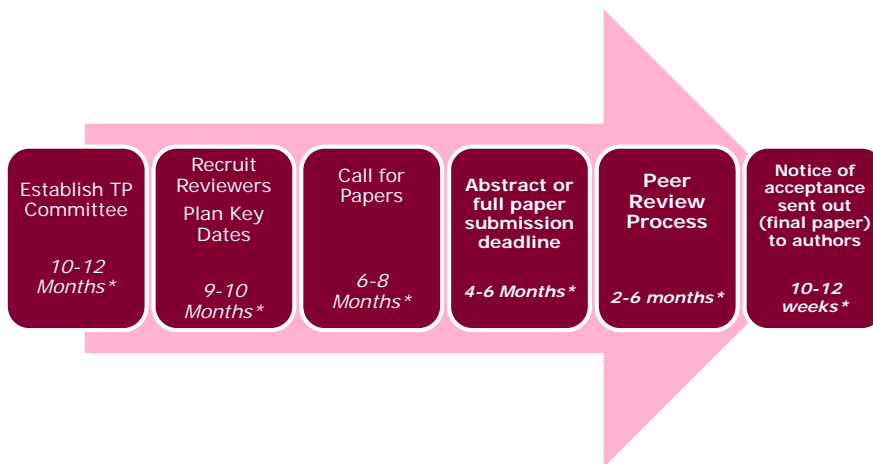
- ▶ Budgets – all milestone dates:
 - **1 year prior** - 6 weeks prior
 - 1 month post - **6 months post**
 - Whenever there is a **significant change** to the forecast
- ▶ Principles of Business Conduct/Conflict of Interest (POBC/COI) required of the following:
 - Conference Chair and Treasurer
 - Any committee member with decision making authority or conducting business on behalf of the conference
- ▶ Contracts – All contracts with a value > USD\$25,000 must be submitted to MCE Conference Contracts for review and execution
- ▶ Financial closing within 6 months of conference end
 - Final report
 - accounts closed or zero balance
 - loan repayment
 - surplus remitted to IEEE
- ▶ Audits –
 - Recommended for All conferences
 - Required when expense > USD\$250,000 and IEEE sponsorship 50% or greater



Technical Program



Technical Program Timeline



** Prior to conference start date*



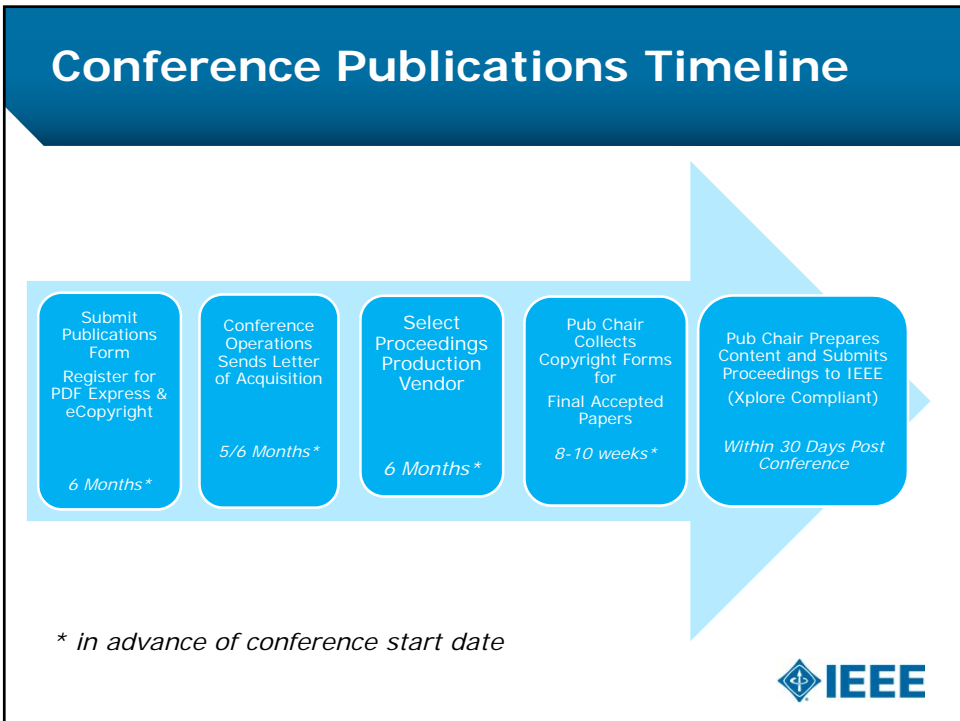
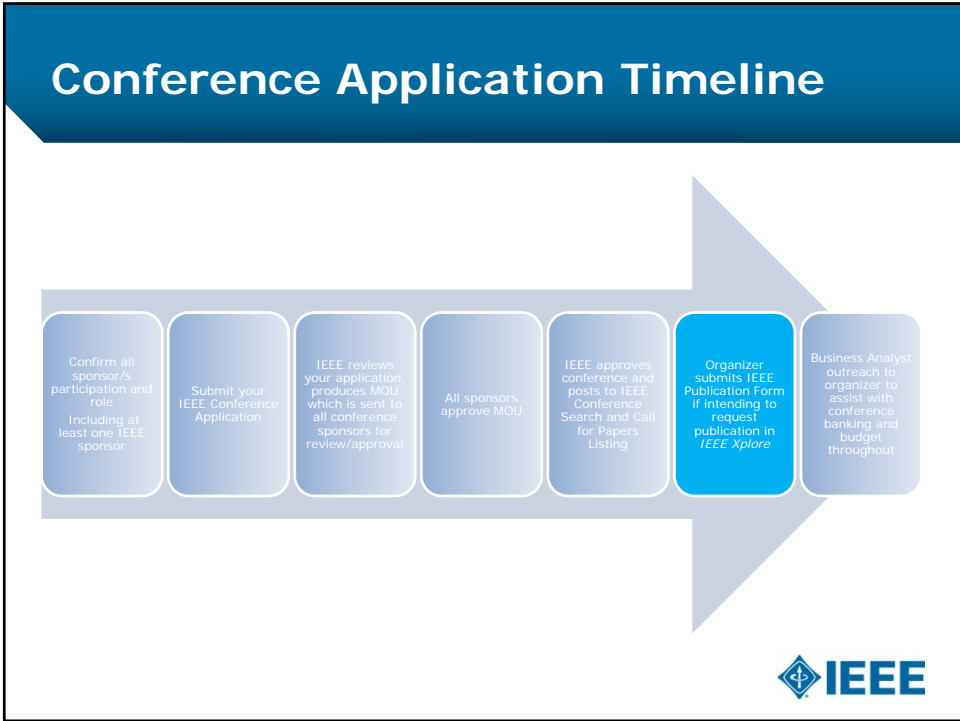
Top Five Keys to a Successful Technical Program

1. Determine conference scope
2. Choose an appropriate tool to manage the peer review process
3. Recruit a sufficient pool of expert reviewers
4. Establish practical, realistic milestone dates for paper submission and review dates
5. Define and communicate conference policies on:
 - Non-presented papers
 - Screening for plagiarism



Conference Publications





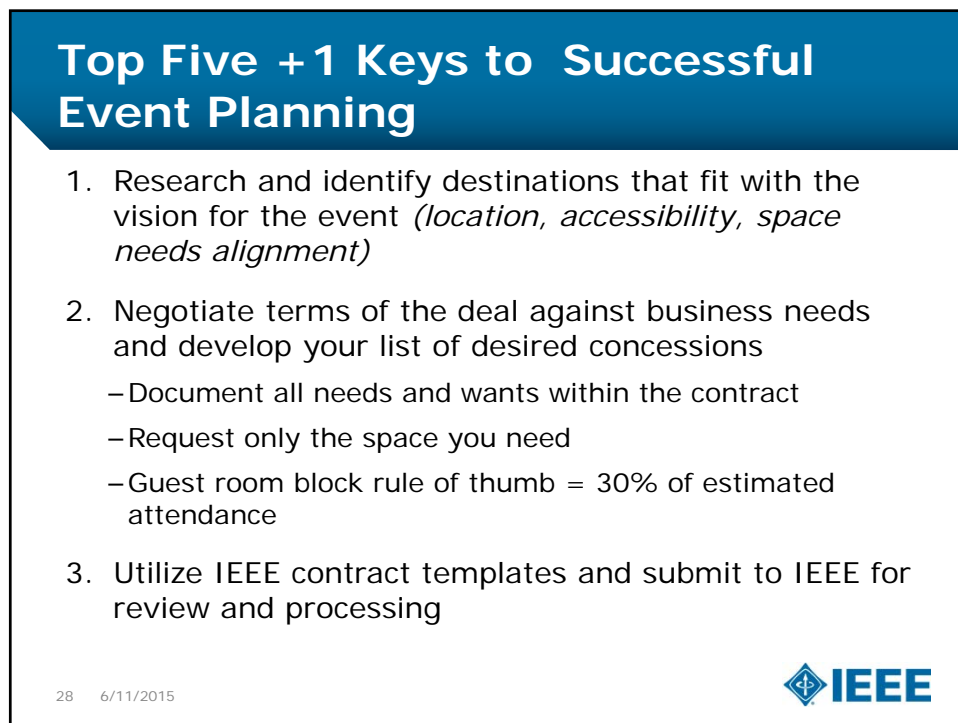
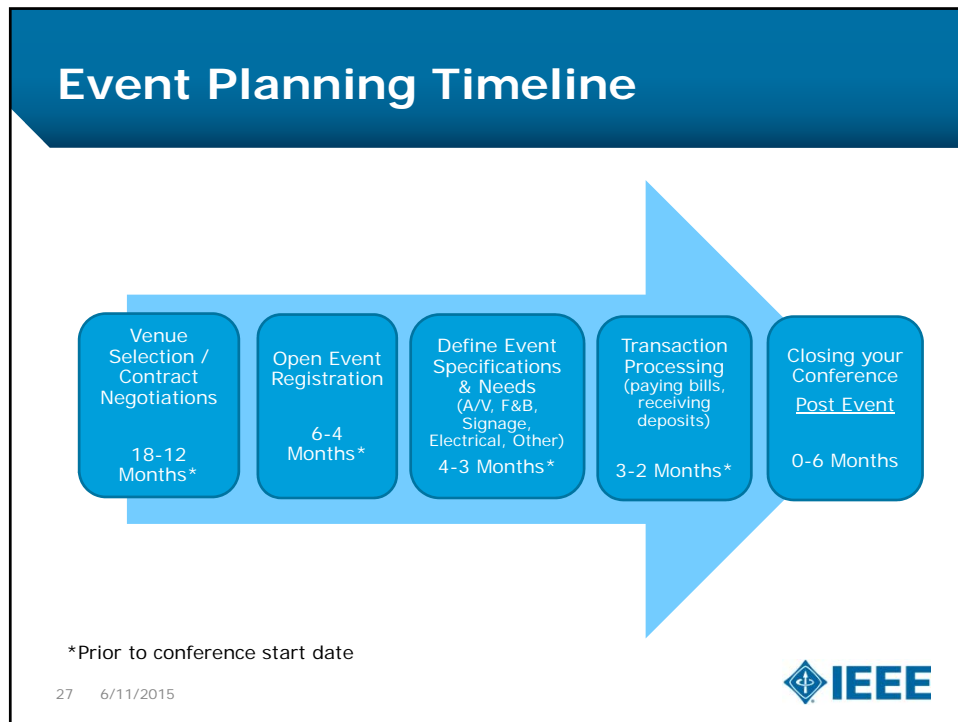
Top Five +1 Keys to a Successful Publications Program

1. Submit the IEEE Conference Publication Form well in advance of the event
2. Register for PDF eXpress and eCopyright sites
3. Approve the IEEE Letter of Acquisition (LOA), which contains key information you will need to include in your publication
4. Select an experienced vendor to produce the conference proceedings publication
5. Create Xplore compliant files for submission
6. Submit your proceedings to IEEE within 30 days after the close of the conference



Event Planning & Execution





Top Five +1 Keys to Successful Event Planning – contd.

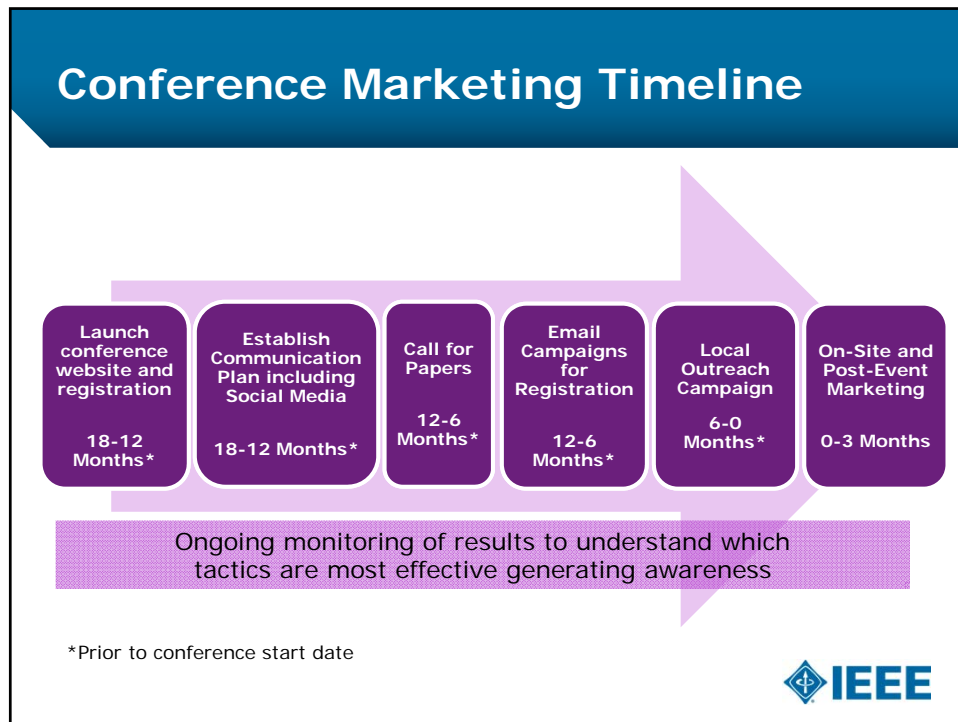
4. Create registration process / establish registration payment collection and management process
 - Online registration system selection and development
 - Payment processing and reconciliation method
 - Customer service point of contact for attendee inquiries
5. Create and send preliminary specifications to conference site (i.e. room set up, catering, audio visual, signage)
 - The What, Where, When, Who and How of the event
 - Share with suppliers, partners, volunteers, staff to ensure that all are familiar with the event and its details
6. Ensure all required deposits/payments are provided within supplier requested timeframes

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Conference Marketing





Questions



IEEE Meetings, Conferences & Events (MCE)



Integrated and Collaborative IEEE Event Strategy Team

- Bring IEEE partners and professional expertise to your event
- Provide services and tools to help conferences succeed
- Provide mentoring and IEEE "Know-How," throughout the conference process
- Create innovative and unique design aspects to enhance your events
- Provide one-stop event management services



Why MCE...

- Global Buying Power
- Technical Expertise
- Dedicated Resources
- Help Identify Sponsors and secure Sponsorship
- Historical Knowledge
- Free Services & Tools
- Financial Management
- Innovative Event Design
- Membership & Organizational Connections
 - Ease navigating the IEEE landscape



Customer Relationship Management

- A single point of access to all conference related activities
- Activities include:
 - Strategic planning, process recommendations, identification of opportunities for partnership and sponsorship with other conferences or entities, both inside and outside of IEEE
- Monitors Conference Application Process to enable a conference to be IEEE approved.
- Reviews Publication Content submissions and coordinates with Conference Organizers to ensure it is Xplore-Compliant



Conference Business Operations

- Provide first line financial support – Assistant Treasurer
- Help Develop Your Conference Budget
- Customized financial solutions for your conference
- Provide guidance for registration fee pricing based on market research and conference budget
- Trend analysis and history of your conference and/or conferences in your area
- Closing - As the experts in relevant policies, we help volunteers to close out conferences in a way that's compliant with IEEE policy



Conference Quality

- Ensure the on-going tradition of quality within IEEE conferences, worldwide
- Consulting on Scope development and Peer Review strategies
- Provide a suite of peer review and plagiarism checking tools to simplify technical program development of your conference
- Manages a random screening process for incoming proceedings to maintain quality standards



Event Management Services

- Site selection and contract negotiation
- Preferred Hotel Partner Program
- Venue and supplier management
- Logistics planning and event management
- Suite of registration services based on your needs
- Audience Generation strategies



Audience Engagement

- ▶ Website design guidance
- ▶ Communication plan consulting
 - Email campaign
 - Social media
- ▶ Outreach strategies to drive attendance
- ▶ On-site, post-event and 365 day conference marketing ideas



Conference Education Program

- ▶ Enables organizers to gain understanding of the principles and skills necessary for running an IEEE sponsored conference, conveniently and easily
- ▶ eLearning Courses - Self-paced, online courses provide organizers with in-depth information and skills on specific conference functions or roles.
- ▶ Educational Webinar Series - One-hour webinars that inform and educate organizers, on topics ranging from 'basics' to 'advanced skills'. Live or Playback
- ▶ Above are accessible at IEEE Center for Leadership Excellence (CLE), using your IEEE Account
 - <https://iee-elearning.org/CLE/>



Questions

