Electrical Safety Committee

IEEE Industry Applications Society

www.sites.ieee.org/ias-esafc/

Electrical Safety Workshop
Operating Manual
and
Planning Guide

Last Revised: September 2021

IEEE IAS Electrical Safety Committee
Electrical Safety Workshop Operating Manual and Planning Guide

1.0   Table of Contents

Note:

Where the word "Committee" is used, it refers to the IEEE Industry Applications Society (IAS) Electrical Safety Committee unless otherwise indicated. Where the phrase "ESW Committee" is used, it refers to the committee that performs the planning and execution of the annual ESW.

2.0   Purpose

The purpose of this document is to:

- Provide continuity and information for planning and conducting the annual Electrical Safety Workshop (ESW).

- Outline the duties and responsibilities of the annual ESW Committee members.

3.0   ESW Policy on Business Ethics, Commercialism, and Vendor Entertainment Etiquette

ESW activities shall adhere to the requirements set forth in the ESW Policy on Business Ethics, Commercialism, and Vendor Entertainment Etiquette. With respect to this policy:

- The Committee is responsible for maintaining the policy; and

- The Committee and the ESW Committee are jointly responsible for administering the requirements of the policy.

The policy is posted on the Committee website: http://sites.ieee.org/ias-esafc/committee-files/

ESW activities shall also adhere to the following IEEE conference code of conduct and safety found at:

https://ieeemce.org/planning-basics/general-guidelines/event-conduct-safety-statement/

- IEEE believes that science, technology, and engineering are fundamental human activities, for which openness, international collaboration, and the free flow of talent and ideas are essential. Its meetings, conferences, and other events seek to enable engaging, thought-provoking conversations that support IEEE's core mission of advancing technology for humanity. Accordingly, IEEE is committed to providing a safe, productive, and welcoming environment to all participants, including staff and vendors, at IEEE-related events.

- IEEE has no tolerance for discrimination, harassment, or bullying in any form at IEEE-related events. All participants have the right to pursue shared interests without harassment or discrimination in an environment that supports diversity and inclusion. Participants are expected to adhere to these principles and respect the rights of others.

- IEEE seeks to provide a secure environment at its events. Participants should report any behavior inconsistent with the principles outlined here, to on-site staff, security or venue personnel, or to eventconduct@ieee.org.

4.0   ESW Committee and Committee Members

The ESW Committee is responsible for the planning and execution of the annual ESW with oversight provided by the Committee.

All members of the ESW Committee are volunteers with the possible exception of the Meeting Planner, the duties of whom may be contracted in accordance with Sections 23 and 24 of this document.

The ESW Committee is structured by roles. A chair is appointed for each role. Appointment of a vice-chair for each role is encouraged for emergency and succession planning purposes.

The Committee Chair appoints the ESW Chair, Future ESW Chair, ESW Secretary, and the Committee Representative. The Committee Chair may replace an individual that is no longer able to perform the appointed role or is not performing the role satisfactorily.

Other ESW Committee members are appointed by the ESW Chair after consultation with the Committee Chair. The ESW Chair, after consultation with the Committee Chair, may replace any ESW Committee member that is no longer able to perform the role or is not performing the role satisfactorily.

The following sections list and describe the ESW Committee roles and list the responsibilities assigned to each role. The list of responsibilities assigned to each role is not an exhaustive one, rather, it is intended to outline the minimum task requirements for each role. In some instances, the general timing of some tasks is provided.

5.0   ESW Committee Meetings

All ESW Committee members are expected to attend all scheduled ESW Committee meetings or send a report in advance of the meeting to the ESW Chair and the ESW Secretary.

ESW Committee planning calls should start eleven months before the ESW and be scheduled once per month until six weeks prior to the ESW and then held every two weeks until the start of the conference. The calls should be chaired by the ESW Chair, the Future ESW Chair, or the ESW Secretary, in that order, based on availability.

Each ESW Committee meeting shall have an agenda distributed before the meeting and meeting minutes distributed after the meeting. ESW Committee members are expected to act promptly to complete any assigned tasks.

6.0   ESW Schedule

Minor changes to the ESW schedule for timing are at the discretion of the ESW Technical Program Chair. Proposed long term changes to the schedule must be submitted to the Executive Subcommittee of the Committee for consideration and possible approval. The Committee Executive may make decisions on the schedule on a one-time occurrence without submitting changes to the Executive Subcommittee of the Committee.

The official ESW program is from 8 am local time on Tuesday to 5 pm local time on Friday, with breaks in the evening after the end of the ESW activities as listed below. The schedule should be arranged so the listed events occur at unique times from other ESW events. The following is the expected ESW schedule. All times are shown are local time at the workshop location.

1. Technical program paper presentations

    a. 1 pm to 5 pm on Tuesday

    b. 8 am to before the start of the Safety Product and Services Exposition[1] on Wednesday

    c. 8 am to 5 pm on Thursday

    d. 8 am to noon on Friday

2. Focus session poster presentations

    a. Student focus session – Tuesday evening after the technical program paper presentations. This focus session may overlap into the Opening Reception.

    b. Focus session – Thursday evening after the technical program paper presentations. This focus session may overlap into the Networking Social.

3. Tutorials

    a. 8 am to noon on Tuesday

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[1] The start time of the Safety Product and Services Exposition can change slightly year to year based on the overall schedule needs, facility considerations, and other reasons.

        b.   1 pm to 5 pm on Friday

   4.   Products and Services Exposition

        a.   Wednesday afternoon after the technical program paper presentations

   5.   Receptions

        a.   Opening Reception – Tuesday evening after the technical program paper presentations

        b.   Networking Social – Thursday evening after the technical program paper presentations

The following additional scheduling considerations should be included in the schedule development process.

1. Other IEEE supported events should not be scheduled at the same time of the Committee Meeting or its Subcommittee meetings.

2. The Committee Executive Subcommittee meeting may occur at the same time as a tutorial.

3. The regular times for tutorials are Tuesday morning and Friday afternoon. If necessary, tutorials may also be scheduled for Monday afternoon. Monday afternoon tutorials may be run in conjunction with any other events as approved by the Committee Chair.

4. IEEE and other standards working groups will be provided time to meet on the Saturday, Sunday, or Monday preceding the ESW. These groups are to work with the ESW Standards Activities Chair to coordinate those meetings.

The ESW Chair is responsible to ensure that a general schedule for the ESW events is established as soon as possible to allow for room assignments. The final schedule should be completed and published prior to the start of registration for the ESW.

7.0   Electrical Safety Committee Chair

The Committee Chair's responsibilities are listed as follows.

1. Appoint the ESW Chair, Future ESW Chair, ESW Secretary and Committee Representative, and when necessary, replace an individual that is no longer able to perform the appointed role or is not performing the role satisfactorily.

ESafe_Committee.pptx

2. Ensure the locations of future ESWs are determined and contracts are in place for at least the next two ESWs.

3. Ensure a budget for the ESW is submitted at an appropriate time to the IEEE IAS Meetings, Conferences, and Events (MCE) for their evaluation and final approval.

4. Oversee all aspects of the ESW Committee responsibilities to ensure all functions of the ESW Committee are successfully executed.

5. Review and provide guidance on the ESW Goal Plan created by the ESW Chair.

6. Ensure the ESW technical program is aligned with the ESW mission.

7. Ensure the ESW is financially solvent and all IEEE required reports and audits are completed and submitted on time.

8. Work with the Committee Awards and Recognition Subcommittee Chair to facilitate recognition of ESW Chair during the ESW. The outgoing ESW Chair is to receive a plaque presented by the Committee Chair. The Future ESW Chair is to receive a lapel pin presented by the current ESW Chair.

9. Work with the Committee Awards and Recognition Subcommittee Chair to develop the awards and recognition presentation during the ESW Awards Ceremony.

10. Attend all author breakfasts and lunches and welcome the authors to the ESW on behalf of the Committee.

11. Work with ESW Local Participation Chair and ESW Chair to review and, if appropriate, approve technical tours associated with the workshop.

12. Assist the ESW Chair and ESW Technical Program Chair to select a suitable keynote speaker if a keynote speaker will be used.

13. The Committee Chair and Immediate past ESW Chair must review this guide annually and revise the guide as required with input from the ESW Committee. The Committee Chair will ensure that this document is maintained and ensure it is posted on the Committee website. Changes to this guide must be approved by the Committee Executive.

8.0   Electrical Safety Workshop Chair

The Electrical Safety Workshop Chair (ESW Chair) is appointed by the Committee Chair. The ESW Chair has the following responsibilities.

1. Create and manage an ESW Committee to ensure successful planning and execution of the ESW.

Example_Electrical_S
afety_Workshop_Cor

2. Appoint a chair to each ESW Committee role (and a vice-chair when needed), other than those appointments made by the Committee Chair.

3. Participate and chair ESW Committee meetings.

4. Complete and share with the ESW Committee an ESW Goal Plan. The document included at the end of this section can be used as a template for this plan. The ESW Goal Plan developed with input from the Committee Chair.

5. Ensure appropriate engagement and participation by IEEE chapters or sections near the ESW location.

6. Understand and follow IEEE rules, regulations, and guidelines for IEEE sponsored conferences/workshops.

7. Oversee the ESW budget process to ensure the ESW will be financially solvent and follow IEEE and IAS requirements.

8. Arrange workshop calls and other meetings with the ESW Committee members as necessary.

9. Ensure an agenda is developed and shared with ESW Committee members prior to all ESW Committee meetings.

10. Ensure meeting minutes are created and shared with ESW Committee members following ESW Committee meetings.

11. Consult with the Committee Chair and ESW Registration Chair to ensure that all VIPs and IEEE dignitaries attending the ESW are appropriately recognized.

12. Ensure the ESW Finance Chair prepares and submits the final financial report to IEEE within six months of the conclusion of the ESW.

13. Ensure the Publicity Chair prepares and submits ESW related articles and photographs to the *Industry Applications Magazine*.

14. Serve as a member of the ESW Technical Program Subcommittee.

15. Work with the ESW Technical Program Chair and the Committee Chair to select a suitable keynote speaker.

   a) A keynote speaker is not required for each workshop.

   b) Keynote speakers may be provided complimentary hotel and ESW registration.

      1. If needed, the ESW Registration Chair will provide a registration code for the complimentary registration.

      2. If needed, the ESW Meeting Planner can arrange for the complimentary hotel room.

   c) Keynote speakers are not usually paid or reimbursed for travel expenses. Travel expense payments can be submitted for review and possible approval by the Committee Executive under special circumstances.

Note: Keynote Speakers name, year spoke and title of Keynote Speaker's presentation should be documented on the ESW Website

16. Develop an ESW theme or special focus, if needed and approved by the Committee Executive Subcommittee.

17. Approximately two weeks before the early registration closing date, arrange for an email to ESW contact list about the early registration closing date.

18. Send welcome email to all registered ESW attendees the week before the ESW. The email should include items like transportation to the ESW hotel, final ESW schedule, appropriate attire, and similar information.

19. Provide individual recognition of ESW Committee members during the ESW.

20. Ensure the ESW website is updated as needed and ESW schedule application has up to date information prior to workshop beginning.

21. Work with the Future ESW Chair to review and, if appropriate, approve proposed changes to the ESW website. It is the responsibility of the Future ESW Chair to review and, if appropriate, approve website changes.

22. Participate in decisions concerning ESW facility issues and budget items.

23. Select and coordinate the purchase of all ESW apparel (shirt, cardigan, etc.) style, design, color, vendor, and other apparel related details. Apparel must be within the allowed budget as determined by the ESW Finance Chair. Provide apparel information to the ESW Registration Chair for including in the workshop registration process.

24. Select ESW Committee and author gifts. Gifts must be within the allowed budget for gifts as determined by the ESW Finance Chair.

25. Distribute ESW Committee and author gifts to all ESW Committee members and authors attending the ESW.

26. Assist the ESW Technical Program Chair in the development of the future ESW Call for Technical Program.

27. Provide reports and updates about the ESW to the Committee as requested by the Committee Chair.

28. Provide the Future ESW Chair updated general information for the ESW website.

29. Create scrolling PowerPoint slides to use during workshop breaks. Include information concerning IEEE code of conduct, supporters, hospitality suites, tutorials held on Friday, and other relevant information.

30. Work with ESW Local Participation Chair and Committee Chair to review and, if appropriate, approve technical tours associated with the workshop.

31. Ensure ESW Committee members work with the appropriate Committee Subcommittee Chairs to perform the work of the annual ESW planning.

32. Attend the author breakfasts and lunches to thank the authors for their contribution to the ESW and to distribute author gifts.

33. Work with the ESW Social Media Chair to create and send ESW related emails using the ESW Constant Contact list.

34. Work with IEEE personnel to create and distribute the ESW workshop survey after the close of the workshop. The ESW Registration Chair will provide the final email list of ESW attendees.

35. Post conference The Committee Chair and Immediate Past ESW Chair must review this guide annually and revise the guide as required with input from the ESW Committee. The Committee Chair will ensure that this document is maintained and ensure it is posted on the Committee website. Changes to this guide must be approved by the Committee Executive.

"ESW Goals Planning WorkSheet.doc"   ESW_Committee_Example.pptx

9.0   Future ESW Chair

The Future ESW Chair is appointed by the Committee Chair. The Future ESW Chair has several ESW and future ESW responsibilities. The main purpose for the Future ESW Chair is to be on the ESW Committee and to learn more about the planning required to have a successful ESW. The Future ESW Chair has some ESW responsibilities to assist in learning the future role. The Future ESW Chair has the following responsibilities.

1. Participate in ESW Committee meetings. Lead the meetings if the ESW Chair is not available.

2. Answer questions submitted through the ESW website "Contact" feature.

3. Review and, if appropriate, approve proposed changes to the ESW website. Submit approved changes to the ESW Webmaster for implementation. (The ESW Chair may also review and, if appropriate, approve website changes.)

4. Create the ESW Committee for the future ESW at least one year before the future ESW.

5. Support the ESW Chair as requested.

6. Have knowledge of and, if appropriate, be involved with decisions concerning facilities, finances, technical program, exhibits, logistics and food.

7. Have access to the current ESW budget.

8. Have access to all contracts, including facilities and banquet, registration services, and ESW Meeting Planner. Initiate discussion with local IEEE chapters and section for the future ESW to ensure adequate participation by local IEEE at least 18 months prior to the future ESW.

9. Work with ESW Finance Chair to ensure local funding per IEEE rules is procured. Note that some local sections may not have the funds required.

10. Work with appropriate personnel for facility, budget, or other issues for the future ESW.

11. Assist ESW Committee members as requested.

12. Lead the early bird drawings each morning of the ESW. Leadership includes organizing collection of giveaway items, providing proper recognition for people/companies who have provided giveaway items, and leading the giveaway process.

Early_Bird_Name
Selector_Template.xls

13. Manage ESW Committee members access to appropriate folders in the ESW Google Drive account.

14. Invite the local ESW Committee representative for the next year to attend the ESW. ESW will provide room and registration. Local IEEE organization to provide travel and food expenses.

10.0 ESW Secretary

The ESW Secretary is appointed by the Committee Chair. The ESW Secretary has the following responsibilities.

1. Participate in ESW Committee meetings. Lead the meetings if the ESW Chair and Future ESW Chair are not available.

2. Work with the ESW Chair to prepare, distribute and maintain agendas and meeting minutes for all ESW Committee meetings. Meeting agenda should be sent no later than four working days before the meeting. Meeting minutes should be sent within five working days after the meeting.

3. Facilitate activities between ESW Committee members.

4. Perform special assignments as requested by the ESW Chair.

5. Maintain a list of IEEE and other organization VIPs attending the workshop. Work with ESW Chair on special arrangements/amenities.

6. Collect any ESW Committee and author gifts that were not presented at the ESW. After the ESW, mail the gifts to the applicable persons and include an appropriate cover letter.

7. Managing final copies of all workshop related documents, presentations, etc., that may be required as an official record or that may be of assistance to the Future ESW Chair.

11.0 ESW Technical Program Chair

The ESW Technical Program Chair is appointed by the ESW Chair. This role may have a vice-chair. The ESW Technical program Chair has the following responsibilities.

1. Participate in ESW Committee meetings.

2. Ensure the mission of the ESW is considered when selecting papers and developing the technical program.

3. Ensure the paper and presentation guidelines stay on the leading edge of technology.

4. Update the ESW paper style guide and presentation templates as needed.

5. Manage the ESW Technical Program Subcommittee which has the responsibility to assist with all aspects of the development of the ESW technical program. ESW Technical Program Chair provides subcommittee membership recommendations to the Committee Chair. The Committee Chair reviews and acts on those recommendations. The ESW Technical Program Chair, ESW Focus Session Chair, and ESW Chair are automatically members of the ESW Technical Program Subcommittee.

6. Work with the ESW Chair, ESW Tutorial Chair, and ESW Publicity Chair to create the ESW Call for Technical Program.

7. Work with the ESW Social Media Chair, ESW Publicity Chair, and Future ESW Chair to distribute the ESW Call for Technical Program.

8. Communicate regularly to ESW technical program authors to ensure deadlines, required formats, ESW details, and other appropriate information is communicated as needed.

9. Collect and organize for review all ESW paper and poster abstracts submitted by authors. Collection should be through the Google Drive and Form+ on-line system.

Formplus ESW.pptx

10. Work with the ESW Technical Program Subcommittee to select ESW paper and focus session selections to be included in the ESW program.

11. Notify all authors if their proposal was accepted, accepted as spare, or rejected. If accepted or accepted as spare, inform the author if the proposal was chosen as a presentation, case history, or focus session. For accepted as spare authors, inform them if they do not present at the current ESW, they are guaranteed to present at the next ESW.

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cking_with_Assignmer

12. Collect all rough drafts of papers, presentations, and posters and distribute them to the ESW Technical Program Subcommittee for review for content, formatting, and commercialism.

13. Notify all authors of any recommended changes to their documents resulting from the ESW Technical Program Subcommittee review.

14. Collect all final papers, presentations, and posters and distribute them to the ESW Technical Program Subcommittee for final review. Notify authors of any required changes to final documents to correct any commercialism concerns.

15. Confirm with each author that at least one author from their paper or poster will attend the workshop and make the presentation.

16. Provide final documents to the ESW Workbook Chair for inclusion in the workshop material.

17. Invite authors to the appropriate author breakfast or luncheon. When possible, authors should attend on the day that they are speaking so last-minute instructions and recognition can be given prior to their presentation.

18. Create the draft agenda for the workshop and send it to the ESW Committee and authors for review. Provide final workshop agenda to ESW Committee for their use.

19. Work with the ESW Facilities Chair and ESW Meeting Planner to ensure facilities and catering requirements are met and on the same time schedule as listed in the final agenda.

20. Coordinate procurement of laptop computers for use throughout the workshop for showing all presentations. This may be accomplished by delegating this assignment to another ESW Technical Program Subcommittee member.

21. Attend author breakfasts and lunches and provide instruction to authors concerning details of the presentation area, such as how many screens will be used and how to use the presentation management tool provided.

22. Serve as primary contact person for authors during the workshop and communicate any agenda or schedule changes to the authors.

23. Work with the ESW EventMobi Chair to ensure software is set-up for feedback collection and communicated to each presentation.

24. Manage the ESW prize paper selection process using scores from the presentation oral reviews, technical reviews from ScholarOne Manuscripts, and input from the ESW Technical Program Subcommittee.

25. Provide a list to the ESW Chair of all technical program authors. The list will be used for determining the quantity of author gifts needed.

26. Send ESW Meeting Planner or designate a list of how many authors will attend each author's breakfast or luncheon.

27. Send list of authors and papers to the Committee Paper Review Subcommittee for peer review and possible publishing in the *Industry Applications Magazine* or *Transactions on Industry Applications*.

28. Assist the ESW Workbook Chair with creation of the material for sending the workshop record to IEEE Xplore.

29. Provide the Future ESW Chair updated technical program information for the ESW website.

30. Assist the ESW Chair and Committee Chair to select a suitable keynote speaker.

31. Ensure that technical program schedule is provided to ESW EventMobi Chair and Future ESW Chair for distribution on both the application and the website.

32. Manage the Continuing Education Units (CEU) program for the ESW. This includes the CEUs for the ESW technical program and tutorials. Management of the CEU program includes the following.

    a. Submit application for CEUs to the IEEE CEU Coordinator.

    b. Updating ESW CEU form and instructions and provide them to the ESW Registration Chair for inclusion in registration packets.

    c. Collecting all completed CEU forms at the end of the ESW.

    d. Develop a roster of attendance and submit to IEEE CEU Coordinator.

    e. Forward the IEEE invoice for CEUs to the ESW Finance Chair for payment after the IEEE CEU Coordinator submits the invoice.

33. At the conclusion of the ESW, make a folder of all final full presentations and case history presentations available for distribution to ESW attendees if a suitable distribution mechanism(s) can be found.

Below are typical submittal deadlines for the technical program development. Dates refer to months before the ESW.

- ▪ 10 months: Collect and tabulate technical program proposals.

- ▪ 8 months: Notification of acceptance of submitted proposal and required deadlines.

- ▪ 7 months: Notify authors that completed papers are due in one month.

- ▪ 6 months: Send papers to reviewers and collect comments from reviewers.

- ▪ 6 months: Remind authors that have yet to submit that the final paper and presentations are due.

- ▪ 5 months: Send comments and suggestions on submitted papers to the authors.

- ▪ 4 months: Review final papers from authors.

- ▪ 3 months: Request authors to complete copyright documentation.

- ▪ 3 months: Submittal of finished presentation materials.

- ▪ 2 months: Send final comments on presentations to authors.

- ▪ 1 month: Send the final papers and presentations to the ESW Workbook Chair for inclusion in the workbook and flash drive.

12.0 ESW Tutorial Chair

The ESW Tutorial Chair is appointed by the ESW Chair. This role may have a vice-chair. The ESW Tutorial Chair has the following responsibilities.

1. Participate in ESW Committee meetings.

2. Ensure the mission of the ESW is considered when selecting tutorials.

3. Assist the ESW Technical Program Chair in the development of the ESW Call for Technical Program.

4. Organize for review all ESW tutorial proposals submitted by authors.

5. Work with the ESW Tutorial Program Subcommittee to select tutorials to be included in the ESW program.

6. Notify all authors if their tutorial proposal was accepted or rejected.

7. Collect rough draft presentations of tutorials.

8. Review tutorial presentations and evaluate the presentation for commercialism.

9. Notify all authors of any recommended changes to their presentation resulting from the tutorial review.

10. Collect and review final tutorial presentations. Notify authors of any needed changes to final presentations to address any commercialism concerns.

11. Confirm with each author that at least one author for their tutorial will attend the ESW and make the presentation.

12. Provide a list to the ESW Chair of all tutorial authors. The list will be used for determining the quantity of author gifts needed.

13. Develop a schedule for the tutorials using Tuesday morning and Friday afternoon time slots. Consider scheduling tutorials on Monday afternoon if the Tuesday and Friday time slots are full and additional tutorial times are needed.

14. Send tutorial titles and abstracts to the ESW Technical Program Chair (for including in the ESW agenda) and the Future ESW Chair (for posting on the ESW website.)

15. Ensure that tutorial authors provide handouts to all attendees of the tutorial information presented. Notify ESW Chair if tutorial author needs help with printing handout material (may not have company printing capability).

16. Provide tutorial report to Committee Technical Subcommittee Chair.

17. Work with ESW Local Participation Chair to ensure that there are volunteers available to support the tutorials, including lunch.

18. Provide each tutorial leader with a list of registered attendees for that leader's tutorial.

19. Provide the Future ESW Chair updated tutorial information for the ESW website.

20. Coordinate the technical program presentations.

    o Update the ESW presentation template for the annual ESW and provide it to the Technical Program Chair.

    o Collect all presentations from authors at least one month prior to the ESW. Review presentations for commercialism and adherence to the ESW presentation template.

    o Before the start of the Technical Program, coordinate with the A/V contractors to ensure presentations display appropriately. Ensure the ESW logo is displayed as the default background when no presentation is loaded. Ensure all video files display appropriately and with sound.

    o Coordinate with the ESW Chair to ensure the ESW loop presentation is ready.

    o Attend author breakfasts and lunches to collect final updates to presentations. Address the authors on appropriate technical tips for presenting on stage.

    o Coordinate the live presentations on stage. Assist presenters as necessary.

13.0 ESW Focus Session Chair

The ESW Focus Session Chair is appointed by the ESW Chair. The ESW Focus Session Chair coordinates the activities associated with the focus session. As such, the ESW Focus Session Chair works closely with the ESW Technical Program Chair. The ESW Focus Session Chair is a member of the ESW Technical Program Subcommittee. The ESW Focus Session Chair has the following responsibilities.

1. Participate in ESW Committee meetings.

2. Review and update the ESW focus session poster template.

3. Participate in the ESW Technical Program Subcommittee in the technical program selection process and choose the focus session abstracts. Typically, the number of posters is limited to ten because of space availability and tutorial management considerations.

4. Work with the ESW Facilities Chair to identify and layout an area for the focus session presentations.

5. Work with the ESW Technical Program Chair to choose a time for the focus session presentations.

6. Work with the ESW Technical Program Chair to ensure all accepted authors are notified and provided with the template and guidelines for focus session presentation.

7. Collect drafts and final submissions for each focus session presentation and review each submittal for technical, formatting, and commercialism. Provide comments to authors to address any concerns.

8. Provide final submissions to the ESW Meeting Planner or designate to have the posters printed locally near the ESW venue.

9. Communicate with focus session authors so they know to be at their presentations at the designated day and time.

10. Develop the oral feedback forms for each focus session presentation and develop a method to distribute and collect the forms for each presentation.

11. Ensure presentations are displayed properly at the designated focus session presentation area before the official start of the presentation time.

12. Ensure at least one author shows up for each poster.

13. Distribute and collect focus session oral review forms during the focus session.

14. Process and analyze the data from the focus session oral review forms.

15. Review comments from attendees and authors to determine if any changes should be made for next year's poster presentations.

16. Provide the Future ESW Chair updated focus session information for the ESW website.

Below are typical submittal deadlines for the technical program development. This timing may be adjusted as needed by the ESW Focus Session Chair.

- 8 months prior to ESW – Update poster template and send to authors along with due dates.

- 7 months prior to ESW – Review draft poster presentations and provide feedback to authors.

- 5 months prior to ESW – Collect and review final posters. Send comments to authors to address any commercialism concerns with the final submittal deadline. Work with ESW Meeting Planner or designate to determine suitable location for focus session.

- 3 months prior to ESW – Collect any remaining posters. Send to the ESW Meeting Planner or designate for printing.

- At the ESW:

  o Ensure posters are printed and displayed properly.

  o Work with the ESW EventMobi Chair to ensure the EventMobi app is ready for review feedback. Remind presenters and participants to provide feedback to the Focus Sessions

  o Ask the poster authors if they would like to keep their poster. Discard any posters the authors do not want to keep.

14.0 ESW Publicity Chair

The ESW Publicity Chair is appointed by the ESW Chair. This role may have a vice-chair. With the approval of the Committee Chair and the ESW Chair, a company may be contracted to provide assistance to the ESW Publicity Chair. The ESW Publicity Chair has the following responsibilities.

1. Participate in ESW Committee meetings.

2. Manage the development of ESW branding and marketing materials that help promote the ESW and its mission. Marketing materials include items such as the ESW logo and material for social media posts, magazine advertisements, electronic media, and video messages.

3. Manage the invitation of and participation of appropriate publication and other media related company representatives to the ESW.

4. Provide marketing content to the ESW Social Media Chair for dissemination through ESW social media outlets.

5. Collect and save photographs for historical purposes. Transfer this information to the Committee Historical and Records Subcommittee Chair.

15.0 ESW Social Media Chair

The ESW Social Media Chair is appointed by the ESW Chair. This role may have a vice-chair. The ESW Social Media Chair has the following responsibilities.

1. Participate in ESW Committee meetings.

2. Coordinate with other ESW Chairs to promote items of significance to the ESW community in general and about the annual ESW. Such items should include the following.

   o Important dates and deadlines

   o Opportunities for corporate support of the ESW, availability of hospitality suites at the ESW, and participation in the ESW Products and Services exposition.

   o Calls for papers and tutorials

   o Awards and special recognitions received by ESW participants and leaders

   o General promotion of the ESW, dates, venue, technical program, companion program, tours, hospitality suites, receptions, and similar items.

   o Updated and live promotion of the ESW during the ESW.

   o Post ESW highlights

   o Other electrical safety news which relate to the ESW mission.

3. Work with the ESW Publicity Chair to provide timely and consistent promotion of the ESW by creating and following a "promotional schedule" for all ESW publicity and social media.

   o The promotional schedule shall include at least the following.

     ▪ Content to be promoted

     ▪ Communication vehicle on which to promote content

     ▪ Deadline for content development

     ▪ Deadline for content delivery

     ▪ Release date for content

   o The promotional schedule shall include at least the following promotional vehicles.

     ▪ Constant Contact (or similar email newsletter platform)

       ● Constant Contact manages the ESW email distribution list so all those who have opted out of communications will not receive future Constant Contact emails. Any new newsletter platform must include this feature.

- Constant Contact allows content to be developed and scheduled for later release. This makes timely distribution of newsletters and other information easier and more systematic.

  ▪ Emails from the ESW Chair

    - Critical ESW events such as registration opening, early registration deadline, and ESW welcome email should be sent using the ESW Chair's IEEE email account.

    - An account has been set up through IEEE that will alias the ESW Chair's account and will allow for mass distribution to those who have opted to receive ESW communications.

  ▪ Facebook and Twitter

    - These platforms are managed on HootSuite.com so that posts can easily be scheduled for future release, limiting the time required to effectively promote on these platforms.

  ▪ LinkedIn

    - This platform allows for users and the managers to post on the group message board. All ESW Chairs are encouraged to post promotions for their ESW projects directly on the group message board. The ESW group manager (ESW Social Media Chair) will periodically post items that are of interest to the ESW group members, including "in-the-news" items and important ESW announcements, deadlines, etc.

    - The ESW group manager shall also send critical ESW events such as registration opening and early registration deadline through the email feature in LinkedIn to all group members who have not opted out for receiving emails.

  ▪ Digital media and print media (Such as the *Industry Applications Magazine.*)

4. Work with the ESW Publicity Chair to develop a unified promotional message look and feel for ESW promotional messages. Fonts, layouts, graphics, color schemes, and other aspects of the messages shall be consistent. External consultants may be used to assist in the development of certain materials.

5. Manage all ESW social media and related accounts, including Twitter, Facebook, LinkedIn, Hootsuite, and Constant Contact.

16.0 ESW Student Program Chair

The ESW Student Program Chair is appointed by the ESW Chair. This role may have a vice-chair. The ESW Student Program Chair has the following responsibilities.

1. Participate in ESW Committee meetings.

2. Manage all ESW activities related to the IEEE IAS Electrical Safety Prevention through Design Engineering Education Initiative including:

   a) Ensuing the program is approved by the IAS Board annually, including the student travel reimbursement amount approved by the Board. The current Board approved amount is $7,200.00 USD annually.

   b) Ensuing information on the Students section of the ESW website is accurate. Provide updates to the Future ESW Chair as needed.

   c) Updating the ESW student program poster templates as needed.

d) Send request for proposals in late summer to notify students and faculty of the Call for Student Paper proposals.

Call for Student
Proposals_Sample Em   Call for Student
Proposals_Sample Em
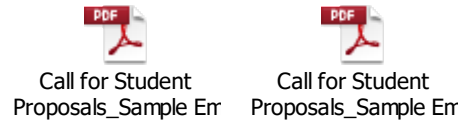
e) Send notification to *Industry Applications Magazine* to publish an announcement for Call for Student Papers proposals to student and work with ESW Social Media Chair to communicate call for papers on the ESW social media platforms.

Call for Student
Proposals_Sample Ma   Call for Student Proposals_Facebook Announcement.png (Command Line)

f) Acting as the primary liaison to students who have applied for the Electrical Safety Prevention through Design Student Engineering Education Initiative.

Student Poster
Review Form.doc   Student Submissions
Ranking_Sample Shee
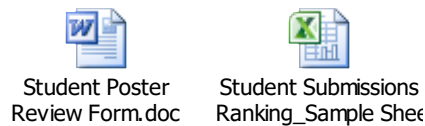
g) Assist in the selection of winners of the Electrical Safety Prevention through Design Student Engineering Education Initiative. A maximum of six students may be selected per year.

Next Steps to
Awarded Students_S

h) Perform similar duties as that of the Focus Session Chair, such as collect poster presentations from student authors.

i) Assist students with Visa Invitation Letter if needed

j) Provide names and sleeping arrangements to the ESW Facility Chair so that hotel rooms are reserved for them. See policy on room sharing and being accompanied by a companion.

k) Collect expense report information from students on site and forward to the ESW Finance Chair for reimbursement of the appropriate part of their travel expenses. Students from Canada, Mexico and the US may be reimbursed up to $600.00 USD. Students from other countries (i.e. "International Students") may be reimbursed up to $1,200.00 USD.

Visa Invitation Letter
Sample_PDF.pdf   Visa Invitation Letter
Sample_WORD.docx

17.0 ESW Workbook Chair

The ESW Workbook Chair is appointed by the ESW Chair. This role may have a vice-chair. The ESW Workbook

Chair has the following responsibilities.

1. Participate in ESW Committee meetings.

2. Work with the ESW Technical Program Chair, ESW Exposition Chair and ESW Chair to collect all presentations and other correspondence to create the workshop workbook. The workbook may be offered in a number of manners. Electronically can be either online or on a flash drive. Hardcopy of the workbook will be made available for purchase during early registration. Use the previous year's workshop workbook as a guide for what to include in the current year workbook. Typical workshop workbooks include the following.

    a) Table of Contents

    b) Welcome Letter from ESW Chair

    c) ESW Agenda

    d) IEEE and IAS Membership Information

    e) Workshop Mission and Strategies

    f) Various organization information, i.e. new electrical safety resources, technology (Ex: IEEE-SA Electrical Safety Resource Center, IEEE Electrical Safety Virtual Community, ESFI)

    g) ESW Papers

    h) Supporter List

3. Work with the Finance Chair to establish who will perform printing of Workshop documents, create Workshop memory sticks and print other documents as needed.

4. Work with the selected printing company to produce the hardcopy of the workbook. The ESW Finance Chair will provide direction on where to send materials for printing.

5. Work with the selected company to produce the electronic flash drive version of the workbook if a flash drive will be provided.

6. Complete the Workshop Publication Form in conjunction with the ESW Chair, about 12 months prior to the workshop.

7. Complete the LOA (Letter of Acquisition) to and send IEEE at least 12 months prior to the workshop. Forward the completed LOA to the ESW Technical Program Chair for reference of Copyright numbers as needed on the front page of each technical paper.

8. Work with the ESW Technical Program Chair and apply for IEEE PDF eXpress® site for use by authors to create the IEEE Xplore® compliant version of their manuscript. https://www.ieee.org/conferences/publishing/pdfexpress.html

9. Provide IEEE PDF eXpress site information to the ESW Technical Program Chair.

18.0 ESW Corporate Support Chair

The ESW Corporate Support Chair is appointed by the ESW Chair. This role may have a vice-chair. The ESW corporate Support Chair has the following responsibilities.

1. Participate in ESW Committee meetings.

2. Solicit financial support for the workshop.

3. Manage invoices and track receipts for financial support for the workshop. This work is to be done in conjunction with the ESW Finance Chair.

4. Coordinate recognition of financial supporters through information in the workshop registration packets, banners, signs, and meeting presentation materials used at the workshop.

5. Send thank you letters and a hardcopy certificate of appreciation to financial supporters after the workshop to thank them for their support.

ESW_Corp_Support_
Certificate - Template

6. Keep a list of potential and past financial supporters.

7. Provide current supporter logos to the Meeting Planner or designate to use in creating supporter appreciation signs.

8. Manage the list of support opportunities and seek additional support opportunities as appropriate.

9. Use and update (as needed) the ESW Corporate Support Responsibilities document, which lists the details and timing for corporate support related activities.

10. Provide corporate support information to the ESW Chair for inclusion in the scrolling PowerPoint presentation used during workshop breaks.

11. Ensure corporate supporters are recognized via signs for all breaks, lunches or other supported functions.

19.0 ESW Products and Services Exposition Chair

The ESW Products and Services Exposition Chair is appointed by the ESW Chair. This role may have a vice-chair. The ESW Products and Services Exposition Chair (ESW Expo Chair) has the following responsibilities. With the approval of the ESW Chair, a decorator company may be contracted to assist in these duties.

1. Participate in ESW Committee meetings.

2. Coordinate all aspects of the ESW Products and Services Exposition, including the following.

    a) Floor plans for the exhibit area should ensure that there would only be one size space for all exhibitors (such as 10' x 10'). Different size spaces complicate any last-minute rearrangements that always seem to be necessary.

    b) Keep a list of exhibitors and potential exhibitors, including their name, company, and email addresses, from the previous workshops.

    c) Solicit from the ESW Committee members suggestions for new exhibitors.

    d) Solicit potential new exhibitors.

    e) Create an Expo Kit that includes details concerning the location where the exposition will be held, booth layout, and shipping information. Expo Kit shall include a copy of or a website link to the ESW Policy on Business Ethics, Commercialism, and Vendor Entertainment Etiquette.

    f) Ensure exhibition information on the ESW website is accurate. Provide updates to the Future ESW Chair as needed.

    g) Send a preplanning invitation and issue to past exhibitors and potential new exhibitors 6 months prior to the workshop to determine their interest level and that it is not necessary to register yet.

h) Work with the ESW Corporate Support Chair to solicit door prizes from the exhibitors to be used throughout the workshop as early bird prizes or door prizes at the exhibit.

i) Send routine emails to potential exhibitors starting 4 months prior to the workshop, reminding them about registration and requesting donations for door prizes. Include the following type of information in those emails.

     i. Registration procedures and deadlines including a "registration is now open" notice.

     ii. Door prize info / request

     iii. Sponsorship / support info

     iv. Delegation of booth numbers as they become available

     v. Shipping information including Expo Kit and any shipping restrictions that may be inherent with the facility (i.e. weight/height limitations, elevator capacities, shipping dock restrictions)

     vi. Announce that the Expo Kit is now available and is posted on the ESW website.

j) Work with the ESW Registration Chair to track registered and non-registered exhibitors.

k) Coordinate exposition facility planning with the contracted ESW Meeting Planner when used.

l) Work closely with the ESW Facilities Chair in managing the logistics requirements for the exposition.

m) Identify the contact person at the workshop hotel who can answer questions about the facilities and handling services.

n) Obtain a digital photo of the room to be used for the expo.

o) Verify that exhibitors list the type of product that they will be displaying so that they can be kept separate from any competitors at the expo. (Examples are clothing, lighting, software, switchgear, explosion-proof, tools, etc.).

p) Work with the ESW Facilities Chair to determine set-up and availability of space for the exposition and determine if the designated area can accommodate large display items such as switchgear. This includes all doorways, passageways, elevators and loading apparatus. Notify exhibitors of limitations and include them Expo Kit.

q) Work with the ESW Registration Chair to ensure all exhibitors are properly registered for the workshop and at the correct rate. Check the registration data frequently at the website kept by the registration service company. Following up with potential exhibitors may be required.

r) Distribute and collect contracts from all exhibitors prior to the exhibit, as needed.

s) Prepare the Exhibitors Passport listing all exhibitor names to encourage workshop attendees to visit each table and ensure that this is printed.

t) Solicit door prizes from exhibitors and compile a list of door prizes. The value of any door prizes must be within IEEE policies.

u) Assign booth numbers and put the exhibitors name on the floor plan to help visualize competitor locations. If space allows, leave some unassigned "end of row" spaces for last minute exhibitor registrations. Ensure that competitors are as far away from each other as possible. Ensure that those exhibitors who request power are located such that a power supply can reach them. This should be done no later than one week ahead of the exposition so that any last-minute location changes will be easier.

v) Arrange exhibitor booths so that exhibitors with heavy equipment are close to shipping doors.

w) Along with the ESW Meeting Planner, help coordinate shipping efforts.

x) Coordinate deadlines and close registration process one week prior to exhibit. Accept late exhibitor registrations only if space permits. Inform late exhibitor registrants that they might not be included on the PASSPORT.

y) Prepare vendors list for inclusion in workshop workbook. Provide that list to the ESW Workbook Chair.

z) Confirm registration list for distribution to all exhibitors on the day of the exposition.

aa) Confirm name badge process to ensure that all exhibitors and "helpers" will have appropriate name badges for exposition.

bb) Work with the ESW Finance Chair to identify and obtain a door prize for the exposition, if required.

cc) Walk through the site frequently prior to the exposition to detect any issues that need to be resolved.

dd) Make yourself available to deal with any problems the morning of the exposition.

ee) Meet with exhibitors after lunch on the day of the exposition to provide last minute instructions and answer any questions.

ff) On the day of the exposition, announce to the technical session the purpose for door prizes/grand prize and the workings of the PASSPORT system. Since many individuals carry multiple roles it is necessary to explain this ahead of the exposition. The purpose of a grand prize drawing is to encourage attendees to remain at the exposition until the end of the event. Vendors pay thousands of dollars to participate in our three-hour exposition, the grand prize and the PASSPORT system ensure that vendors get the booth traffic that will make them want to return in future years. It also encourages attendees to participate in the exposition to maximize their workshop experience. Committee members are encouraged to stay to the end of the exposition. Anyone registered in any registration category is eligible to win any door or grand prize.

gg) Arrange to have a container or "squirrel cage" for completed PASSPORTS for prize drawings. Post PASSPORT/Expo Map on table near entrance to Expo (use volunteers to distribute if possible). Acquire pens/pencils for distribution as well.

hh) Make an announcement that PASSPORTS must be completed and turned in at least 15 minutes before the drawing. Help conduct prize drawings.

ii) Make sure that someone records who won each prize (vendors like to know who won their prizes). Take pictures if possible.

jj) Visit every booth during the expo to see how things are going and to personally thank every exhibitor. Pay attention to determine how first-time exhibitors are doing.

kk) Coordinate teardown process and supervise shipping procedures for samples and displays.

ll) One week following the workshop, send a thank you letter/email to each exhibitor asking for feedback and suggestions as well as highlighting the time and location of the next workshop.

20.0 ESW Hospitality Suite Chair

The ESW Hospitality Suite Chair is appointed by the ESW Chair. This role may have a vice-chair. The ESW Hospitality Chair has the following responsibilities.

1.   Participate in ESW Committee meetings.

2.   Solicit companies to host hospitality suites during the workshop. Provide a copy or a website link to the ESW Policy on Business Ethics, Commercialism, and Vendor Entertainment Etiquette so companies can have the ESW rules governing the hospitality suite.

3.   Keep a list of companies and potential companies that have sponsored a hospitality suite including their name, phone number, company, and email addresses.

4.   Work with the Meeting Planner or designate to develop and maintain a list of hospitality suite opportunities.

5.   Perform the following activities using the general timeline as indicated.

   a)   Six months before workshop

       1.   Work with ESW Finance Chair and ESW Meeting Planner to determine if hospitality suites will be sold by the ESW or the workshop facility.

       2.   Confirm the method and contact the ESW Registration Company who will accept credit card payments for hospitality suites if the suites are being sold by the ESW. This should be done through the ESW Registration and ESW Finance Chairs.

       3.   Work with ESW Registration Chair to include in ESW online registration process a place where an individual can express interest in hosting a hospitality suite.

       4.   Solicit for hospitality suite hosting.

       5.   Provide previous year hospitality suite hosts first opportunity to host an event if hospitality suite space is limited.

       6.   Send invoices as hospitality suite hosting is confirmed, if required. Finance Chair to be copied on all invoices.

   b)   Five months before workshop

       1.   Follow-up on any additional hospitality suite hosting companies.

       2.   Ensure the ESW website hospitality suites information page includes updated information.

       3.   Work with ESW Meeting Planner to ensure the required hospitality suite spaces are available.

   c)   Three months before workshop

       1.   Follow-up on any additional hospitality suite hosting companies.

       2.   Develop one-page flyer to include in the workshop registration packet to announce the hospitality suites, their location, times, and supporting company.

   d)   Two months before workshop

       1.   Work with ESW Finance Chair to ensure all hospitality suite payments have been received. Follow-up on any payments that have not been received.

       2.   Work with ESW Meeting Planner to ensure the required hospitality suite spaces are available.

       3.   Handover the potential hospitality suite company to the ESW Meeting Planner to coordinate with the hotel for any food and beverages. The ESW Meeting Planner will work with the decorator to move company display equipment into the hospitality suite.

e) One month before workshop

  1. Provide hospitality suite information to the ESW Chair for inclusion in the scrolling PowerPoint presentation used during workshop breaks.

  2. Follow-up on any outstanding invoices for hospitality site support.

f) During the workshop

  1. Meet and thank each hospitality suite hosting company for the support of the ESW.

  2. Ensure recognition and directional signs are posted for each hospitality suite event.

g) After the workshop

  1. Send thank you email to each hospitality suite supporting company.

  2. Solicit feedback from hospitality suite supporting companies for successes or areas of improvement and report back to ESW organization committee.

21.0 ESW Registration Chair

The ESW Registration Chair is appointed by the ESW Chair. This role may have a vice-chair[2]. The ESW Registration Chair has the following responsibilities. The information below also includes miscellaneous items related to registration and the workshop cancellation and refund policy.

1. Participate in ESW Committee meetings.

2. Ensure a contact is in place for registration services for the upcoming ESW[3].

  a) IEEE Meetings, Workshop, & Events is usually used to perform registration services for the workshop.

  b) Review the contract with the ESW Chair and ESW Finance Chair to ensure all required support activities are included in the contract.

3. Get the contact information (name, email address, phone numbers) for the registration services person who is assigned to support the workshop. This person is referred to as the Workshop Registrar.

4. Provide the following typical information to the registration services company.

  a) Workshop registration open date (typically five (5) months before the workshop)

  b) Name badge and badge holder information. Below are the typical requirements.

    1. Badge Holder Color – Clear

    2. Badge Format

      1. Full Registration (Name, Company, City/State/Country, 'Full Registration')
        ● Includes Exhibitor registrations
      2. Guests (Name, 'Companion', City/State/Country)
      3. Students and Volunteers (Name, Company/School, 'Volunteer')
      4. Additional Exhibitors (Name, Company, 'Exhibition Area Only')
      5. QR Code

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[2] It is strongly recommended that this position have a vice-chair as this is a key role for the conference.
[3] Occasionally, pricing should be obtained from different companies to ensure the ESW registration related costs stay reasonable.

6. First Time Attendees to have green stripe at the bottom of their printed badge

c) Ribbons are used to identify individuals with special ESW roles. Below is a typical list of ribbon colors, the text on the ribbon, and meaning of the text.

1. Dark Green – "Keynote" – Keynote speaker for the ESW

2. Orange – "Workshop Committee" – ESW Committee member

3. Green – "Presenter" – ESW paper or tutorial author

4. Neon Orange – "Student" – Student Award Winner

5. Violet – "Volunteer" – Local volunteer assisting with the ESW

d) Prices of registration categories and other items (from Finance Chair's budget)

1. Companion cost and related information
2. Single Day registration available for Tuesday, Wednesday, Thursday, and Friday
3. Complimentary registration
4. Exhibitor booth information and additional persons policy and cost
5. Cost of additional items for sale (e.g. ESW apparel, additional flash drives, printed copies of the workshop workbook, ESW anniversary flash drive)

e) Date of price change when early registration is over. Usually one (1) month prior to the workshop. Coordinate with the last date to order a hardcopy of workshop workbook, ESW apparel, and hotel room block.

f) ESW apparel information. Description, cost, options, and pictures (when possible) will be provided by the ESW Chair for the ESW Registration Chair to include on the ESW registration website.

g) Information for ordering a hardcopy of workshop workbook.

h) Hotel Information

1. Provide hotel name, address, phone number, and link to the hotel sleeping room reservation website. Information to be provided by the ESW Meeting Planner or designate.

2. Penalty of $200 USD for attendees with more than one day registration who are not staying at the workshop hotel.

a. This charge is required because it offsets the required meeting rooms and meals.
b. The following specific note should be prominently shown on the registration website:

i. "Our contract with the hotel includes meeting room fees and other facility charges as part of the room fees paid by our attendees. If you don't stay at the workshop hotel, then your fair share of the meeting room fees, meals, and facilities will be covered by this $200 USD. IEEE Life Members, Students, Tutorial Only Registrants, and One Day Registrants are exempt from this fee."

c. Local attendees are also subject to this fee if not staying at the ESW hotel. Even if the workshop hotel sells out, we typically do NOT waive the fee. Typically, a "second workshop hotel" would be identified if/when the primary workshop hotel is full. If attendees register before the deadlines, they wouldn't have this problem. Otherwise we send the message – "register early and save $200 USD."

i) Cancellation and Refund Policy

1. See the Cancellation Policy section in this document for more information on how cancellations and refunds are managed.

2. Work with ESW Finance Chair and ESW Chair to identify action to take in the event of special circumstances. Examples include:

   a. Partial refund
   b. Full refund
   c. Provide materials no refund

j) The following are typical registration desk open days and times.

   1. Monday 11:30 am to 4:30 pm

   2. Tuesday 7:30 am to 4:30 pm

   3. Wednesday 7:30 am to 3:00 pm

   4. Thursday 7:30 am to 4:40 pm

   5. Friday 7:30 am to 1:00 pm

k) The number and name of each tutorial and the date and time of each.

l) Ask if a visa is required to attend the workshop.

   1. If a visa is required:

      1. Registration payment must be received and processed before the visa letter may be sent.

      2. Provide an automated method to provide the visa per IEEE requirements once payment is processed.

m) Include instructions on how to pay when using more than one credit card.

5. Review the registration page of the ESW website and provide any needed changes to the Future ESW Chair.

6. Review draft of registration webpage and provide feedback to update the pages, as needed.

Advanced
Registration Questic

Example of Completed Registration Questions

7. Perform the following items at the listed timing.

   a) From Registration Opening to ESW

      1. Register as first person; check the resulting confirmation page and pricing.

      2. Confirm public access to Registration site

      3. Coordinate with ESW website contact to have the hotlink to registration site posted

      4. Inform ESW committee that Registration is open, and to begin to publicize

5. Get registration data download website and password; forward to ESW Finance Chair and ESW Products and Services Exposition Chair.

6. Forward any messages from ESW Registration Company about funds transfers to ESW Finance Chair.

7. Get routine download of registration spreadsheet using website; check information; spot check that attendees are being charged correctly; send summary to committee monthly.

8. Respond to email registration questions; delegate as much as possible to ESW Registration Company.

9. Be flexible for international attendees – some can't pay for registration ahead of time; allow them to get an early registration price if they register online and pay at the workshop.

10. Allow credit for door prizes given out the previous year (if awarded).

11. Make sure the ESW Exposition Chair is getting exhibitor registration data from the registration website.

12. Inform the Local Participation Chair of the volunteer requirements for registration. Usually need six volunteers on Sunday afternoon for assembly of the ESW registration packets. Usually need seven volunteers at the registration desk on Monday until early afternoon and two for the afternoon. Usually need seven volunteers at the registration desk for early morning on Tuesday and two in the afternoon.

13. Send email to ESW Committee requesting any items that need to be stuffed in registration packets (no vendor items).

14. Review registration list with ESW Registration Company to determine false registration and remove from system so that extra material is not ordered.

b) Three Months Prior to ESW

1. Confirm with ESW Registration Company who will be the representative that will assist with registration at the workshop.

2. Arrange with the ESW Facilities Chair a complimentary hotel room for the ESW Registration Company representative.

3. Confirm with the ESW Local Participation Chair the volunteer requirements for the registration desk.

4. Coordinate ordering of lanyards, badge holders, and ribbons with the registration company.

5. Get List of attending Authors, Tutorial Authors, Keynote Speakers

Example of
Badgeholders Lanyard

6. Send an email to the committee requesting items to be stuffed in packets (no vendor items). Coordinate printing of materials as necessary.

Example of Items to
Print - 2015

c) Early Registration Cutoff Date (Usually 1 month prior to ESW)

1. Remove early registration pricing information from the registration website.

2. Remove ESW apparel ordering info from registration website.

3. Send ESW apparel order list to ESW Chair. Typically order an additional 20% more of the most popular sizes if additional shirts will be made available for sale at the ESW.

4. Download report of all shirt order details. Create itemized lists to be used on-site during pickup.

5. Determine the number of hardcopies of the workshop workbook that have been ordered and provide that information to the ESW Workbook Chair.

6. Download report of all workshop workbook order details. Create itemized lists to be used on-site during pickup.

7. Coordinate registration volunteers to "stuff envelopes" and assist with initial registration check-in volume.

8.

d) Sunday Before ESW

1. Work with ESW Meeting Planner set up registration area.

2. Check if any special items need to be stuffed in packets, such as VIP ribbons.

3. Make sure handouts, workbooks, flash drives, apparel, etc. are ready in locked committee room.

e) First Day of ESW

1. Help set up registration desk materials.

2. If all materials aren't available at registration time, request a list from the Registration Company representative of those attendees who paid for each item. When the item comes in, check off the names as attendees pick up their item.

3. Be available at the registration desk during the initial period of registration and as needed throughout the day.

4. Have the ESW Registration Company representative print out an attendee list for each tutorial prior to the start of the tutorial, for checking off attendance.

5. Provide a list to the ESW Tutorial Chair to have volunteers check off attendees to tutorials and hand out materials.

f) During Rest of ESW

1. Help set up and take down registration materials from the desk each day.

2. Check in at registration desk regularly to keep up with issues

3. Create the final attendee list on Thursday. Note that any registrants who "opted-out" during their registration should NOT be included in the registration list (printed or electronic).

   1. Add cover sheet for sponsor if a person or company sponsored the list.

    2.   Email an electronic copy of the registration list to all attendees[4] on Thursday.

    4.   Have the ESW Registration Company representative print out an attendee list for each of the Friday Tutorials for checking off at each tutorial and the tutorial lunch. Give to the Tutorial Chair.

g) At End & After ESW

1. Follow-up with the Registration Company representative on any remaining issues, identified improvements for next time.

2. Collect left-over items that weren't given out. Create a list that shows items still owed to attendees. Ship flash drives and workbooks to people in North America that were no-shows, along with any other items for that person.

3. Attend post-workshop committee meeting to summarize the ESW.

4. Forward final invoice from the ESW Registration Company to the ESW Finance Chair.

5. Review ESW survey results for any registration improvement ideas.

6. Send note of thanks to the ESW Registration Company about the help from their representative.

7. Send note of thanks to each registration volunteer.

8. Create email address list for all attendees[5] to use for distribution of workshop survey and final workshop files. Provide the list to the ESW Chair for distribution of the workshop survey and to the Technical Program Chair for distribution of final presentations.

8. Cancellation and Refund Policy

a) All cancellation and refund requests must be made directly with the Workshop Registrar. There is a cost associated with processing the registration therefore we do not provide a 100% refund. If a written request is received by the ESW Registration Company prior to the refund request cancellation date, a refund of 80% will be granted. Refund requests after that time may not be granted.

b) Requests for a refund after the early registration cutoff date should be dealt with as follows:

1. Substitutions within the same company are permitted.

    1.   Someone from the same company can attend in place of someone who is unable to attend..

    2.   If an exhibitor needs to substitute the registration, the Workshop Registrar shall notify the ESW Expo Chair of the change.

2. Offer to mail workshop materials to the registrant after the workshop.

3. If this is not accepted and, if and only if, the workshop finishes with a surplus the person could get some portion of their money refunded after the 20% handling fee.

4. Registered attendees may "downgrade" their registration at any time, subject to the 20% refunding fee.

5. Flexibility may be needed for international attendees. Some can't pay for registration ahead

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[4] Attendees are the Full Registrations, Exhibitor Registrations, and One Day Registrations.
[5] Attendees are the Full Registrations, Exhibitor Registrations, and One Day Registrations.

of time. They should be allowed to get an early registration price if they register online and pay at the workshop. Consideration may be given to eliminating all "fees" when international registrants are unable to attend due to visa complications.

6. Refunds may also be issued for extreme situations such as a serious illness or death in the family.

7. Cancellation fee waivers may also be at the discretion of the ESW Chair.

9. Miscellaneous Items

   a) Some Items may be ordered without registering for the workshop. These must be tracked and the materials sent after the workshop.

   b) Authors are required to pay for registration.

Keynote speakers may receive free registration at the discretion of the Committee Chair.

22.0 ESW Companion Program Chair

The ESW Companion Program Chair is appointed by the ESW Chair. This role may have a vice-chair. The ESW Companion Program Chair has the following responsibilities.

1. Participate in ESW Committee meetings.

2. Provide a list of benefits for registering as a companion and local area information to Future ESW Chair for inclusion on the ESW website.

3. Obtain a list of registered companions from the ESW Registration Chair.

4. Create a one-page flyer about companion activities and provide the flyer to the ESW Registration Chair for inclusion in the registration packet or provided electronically to each companion. This should also be displayed at the registration area in the event that an attendee brought a companion but did not register that companion for the workshop.

5. Approximately one month before the workshop, email the registered companions about guest activities and local attractions at the workshop location. Inform the companions of the Companion's Luncheon at the ESW.

6. Work with the ESW Facilities Chair or ESW Meeting Planner to coordinate the room and catering needs for the Companion's Luncheon.

7. Work with the ESW Local Participation Chair to identify local attractions, events, and destinations that may be of interest to the companions

8. Work with the ESW Meeting Planner or designate to arrange for a local Visitor and Convention Bureau representative and/or a hotel concierge representative to attend the Companion's Luncheon.

9. Notify the corporate supporter of the Companion's Luncheon of the day, time, and location of the luncheon and invite a representative of that company to speak to the attendees.

10. Welcome companions and introduce the speakers at the Companion's Luncheon.

23.0 ESW Facilities Chair

The Chair of the Committee Facility and Finance Subcommittee will be actively involved in the process of choosing hotels, convention centers or any other regarded facilities. Depending on decisions made by the IEEE IAS Electrical Safety Committee Executive Subcommittee, there may or may not be a volunteer holding the position of ESW Facilities Chair or a contracted firm. The person or company responsible for these duties must work closely

with the ESW Chair, ESW Finance Chair, ESW Products and Services Exposition Chair and the Committee Facilities and Finance Subcommittee Chair.

The preferred timing of the ESW is early March.

When determining the timing of the ESW, coordination should occur between the IEEE Electrical Safety Technical Mega Projects Workshop (ESTMP) and the NETA Conference. Many ESW attendees, exhibitors and authors attend the ESW and one of the other listed conferences/workshops.

If this position is filled by a volunteer, the following responsibilities need to be applied. If the facility planning is contracted to a meeting management company, then these and other items should be included in the contract.

The ESW Facilities Chair has the following responsibilities.

1. Participate in ESW Committee meetings.

2. Works with the ESW Chair to establish and to develop specifications for space planning and audiovisual equipment.

3. Work with hotel to provide any needed signs for registration, room locations and socials.

4. Monitor and manage the hotel sleeping room block. Ensure the ESW is credit for reserved rooms and identify any concerns with attrition or lack of rooms.

5. When possible, provide complimentary rooms for ESW Committee members. Priority ranking: winner of the William C. Jordan award, special speakers, student award winners, and fully retired committee members.

6. Provide the hotel the VIP status list for the workshop.

7. Obtains directions to the hotel, with maps, airport courtesy shuttle information, etc. Provide that information to the Future ESW Chair for inclusion on the ESW website.

8. Work with ESW Hospitality Chair to assign hospitality suites for vendors.

9. Work with ESW Standards Activities Chair to assign meeting room space for affiliate organizations and companies. Ensure additional costs are not incurred by the ESW for these meetings.

10. Participates in the monthly planning teleconference.

11. Make all food and beverage selections for breaks, socials, and meals. Provide budgetary catering costs to the ESW Finance Chair as soon as available.

12. Utilize the previous ESW financial numbers and attendance numbers for estimating initial quantities.

13. Establish what the guarantee number deadlines with the hotel and what % overrun is planned.

14. Establish contact with the reservations head for the hotel to determine overflow hotels, transportation shuttle, increasing room block if needed/possible

15. Work with ESW Products and Services Exposition Chair, Registration Chair, and ESW Chair to develop contracts and choose a decorator.

16. Contact the meeting facility catering lead and get the most current menus and prices. Usually required prior to a contract signed by IEEE.

17. Review and, if appropriate, approve all Banquet Purchase orders.

18. Evaluate if bulk purchase for breaks is more advantageous than per person cost. Bulk is usually cheaper. Any pre-wrapped items such as candy bars can be put out for the next break.

19. Plan to use multiple stations for food instead of one large one.

20. Insist on email transmittals of BEO's instead of faxes and use "Track Change" feature of Word.

21. Introduce yourself to the banquet manager when you arrive at the hotel and look at logistics of the dining areas, break areas, based on past ESWs.

22. Plan to arrive at the meeting facility on the Sunday before the start of the workshop so that first thing Monday you can meet with the catering head.

23. Include in the hotel contract a room block before the workshop week so Committee members arriving on the weekend can get the lower price.

24.0 ESW Meeting Planner

The Committee Executive may decide to hire a meeting planner to fulfill the duties of the ESW Facility Chair and other duties as detailed in the meeting planner contract. This contract must be in accordance with IEEE policies and procedures.

If an ESW Meeting Planner is not contracted for these duties, the ESW Chair shall assign the ESW Meeting Planner duties to other members of the ESW Committee.

The ESW Meeting Planner has the following responsibilities.

1. Participate in ESW Committee meetings.

2. Provide hotel information (name, address, phone number, and hotel sleeping room reservation link) to the Registration Chair.

3. Coordinate all activities with the hotel, A/V Company, exhibitor company.

25.0 ESW Finance Chair

The ESW Finance chair is appointed by the ESW Chair. This role should have a Vice-chair. The ESW Finance Chair has the following responsibilities.

1. Participate in ESW Committee meetings.

2. Include the Committee Facilities and Finance Chair on all budget correspondence, i.e. request for approval and final approval acknowledgement.

3. Prepare the workshop budget in coordination with the Committee Facilities and Finance Chair. Budget should be revised at least 12 months prior to the workshop.

4. Review tax implications for Sales Tax, Goods and Services Tax or Value Added Tax.

5. Review revised budget to ensure that it is still expected to generate a minimum of 20% surplus over projected expenses.

6. Review, evaluate and ensure that all Memorandum of Understanding (MOU) are in place for all ESW financial co-sponsors (IAS and local sections).

7. Review the budget with ESW Chair, Registration Chair, Corporate Support Chair, Exposition Chair, and Committee Executive Officers. The original budget must have been approved for submission by the ESW Chair and the Committee Chair prior to submitting for an IEEE workshop application.

8. Obtain approval of proposed budget by IAS Meetings Chair.

9. Submit proposed budget online using IEEE Financial Web Form once ESW Chair has obtained workshop

number.

10. Open workshop bank account using IEEE Concentration Bank Account.

11. Ensure that General Liability Insurance has been obtained by ESW Chair.

12. Review and evaluate all proposals and contracts for their effect on the budget. IEEE requires a contract for all expenditures in excess of $1000 USD. In some cases a contract may be required for any expenditure.

13. Work with Corporate Support Chair and Hospitality Suite Chair to develop and issue invoices. Track all invoices issued against monies received either by cheque or credit card.

14. Track monthly bank statements using the IEEE Certificate of Accuracy.

15. Review registration information reports to evaluate impact on finances.

16. Arrange for onsite printing location for registration list and any other additional local printing requirements.

17. Monitor room block for effect on budget.

18. Fill for hotel credit application, if required.

19. Meet with hotel staff on arrival.

20. Review, evaluate and ensure all facilities arrangements are as per contracts.

21. Ensure all invoices are paid within the time allowed.

22. Repay all loans for seed money within 30 days of the end of the workshop if it looks like there will be sufficient money to cover all expenses.

23. Distribute surplus as per outlined in MOU.

24. Keep track of all income and expenses.

25. Deposit income items into bank account (i.e. Corporate Support payments, other receivables).

26. Prepare a preliminary financial report and submit it online to IEEE shortly after the workshop.

27. Prepare the online final report for IEEE; should be submitted within six months of the workshop.

28. Close bank account using Destroyed Cheque Form. Destroy all bank account credit cards.

29. Ensure IEEE has completed tax forms 1099 and 1042 prior to the end of each year.

30. Compile all information required for audit and submit to IEEE Financial Services.

31. Work with the ESW Exposition Chair to identify and obtain a door prize for the exposition, if required.

32. Identify printing/flash drive companies to produce the hardcopy/flash drive of workshop proceedings. Provide direction to the Workbook Chair on proceeding with ESW publications.

26.0 ESW Local Participation Chair

The ESW Local Participation chair is appointed by the ESW Chair. The ESW Local Participation Chair has the following responsibilities.

1. Participate in ESW Committee meetings.

2. Inform the local[6] IEEE members on the various activities of the ESW.

3. Ensure information about local events and activities are on the ESW website prior to the opening of registration.

4. Assist local IEEE sections with publicizing the ESW to local IEEE members, local companies, unions, and educational institutions.
    o Monthly communication should start when the ESW registration is open and continue until the opening of the ESW.
    o Include corporate support opportunity information with communications to local companies, unions, and educational institutions.

5. Assist the Companion Program Chair with identifying local attractions, events, and destinations that may be of interest to the companions.

6. Arrange for local volunteers to assist with the ESW. All volunteers will get a free pass to the conference. They will need to stop at the registration desk to get a code for their badges. The volunteer needs are typically the following.

    o Assist with workshop registration activities.

        ▪ Six volunteers are usually needed on Sunday for the ESW registration packet creation activities.[7]

        ▪ Seven volunteers are usually needed on Monday from 11:00 am to 1:30 pm as that is a big time for registration packet distribution. Two volunteers are usually needed from 1:30 pm to 4:30 pm on Monday.

        ▪ Seven volunteers are needed on Tuesday from 7:00 am to 10:00 am as that is a big time for registration packet distribution. Two volunteers are usually needed from 10:00 am to 4:30 pm on Tuesday.

    o No volunteers are needed for workshop registration Wednesday through Friday.

    o Assist as needed during the Technical Sessions, three (3) volunteers are usually needed during the presentations. They will do a head count at 9:30 am and 1:30 pm each day of the conference papers. The numbers for those counts need to be turned into the Technical Program Chair.

    o Assist with tutorial registration activities. Four (4) volunteers are usually needed for Tuesday morning 7:00 am to 10:00 am and three (3) volunteers are needed for Friday afternoon 12:30 pm to 3:30 pm. One person is needed at each Tutorial.

    o Provide three (3) volunteers for the Expo session to pass out forms for the raffle.

    o Provide backup volunteer(s) to replace volunteers who are unable to meet their commitment.

7. Work with Future ESW Chair to ensure the Local Participation Chair for the future ESW is invited to the current year ESW so the future Local Participation Chair can learn about the requirements of the position.

8. Coordinate all activities for any technical tours associated with the workshop.

    o All tours must be approved by the Committee Chair and the ESW Chair to ensure the tour schedule and content will not conflict with the timing of ESW events and is within the mission of the ESW.

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[6] Local, as used in this document, refers to the geographical area near the conference location.
[7] Several ESW attendee companions may assist with the registration packet assembly on Sunday afternoon. The Local Participation Chair should work with the Registration Chair to determine the actual local volunteers needed for Sunday registration assistance.

- o Coordination of tours needs to be done well in advance of the opening of the ESW registration. Typically, the tours are conducted on Monday at 7:00 am and 9:30 am and last 2 hours. All tours must be completed and all people back to the hotel by 12:30 pm on Monday.

- o All tour activities must be separate from the ESW. The ESW will not collect money, pay any fees or arrange insurance for any activity. The Local Participation Chair shall set-up a method that will allow the ESW participants to sign-up for any tours that are arranged by this committee.

- o Tour activities and contact information must be displayed on the ESW website before ESW registration opens.

- o Tours may be arranged by an independent company or by the local IEEE section.

- o All activities must provide the appropriate insurance coverage for participants.

9. Work with the Finance Chair to make sure the front money (if provided) is returned with profits to the local IEEE section.

27.0 ESW Standards Activities Chair

The ESW Standards Activities Chair is appointed by the ESW Chair. This role may have a Vice-chair. The ESW Standards Activities Chair has the following responsibilities.

1. Participate in ESW Committee meetings.

2. Work with standards working groups to coordinate meetings of those working groups at the workshop.

3. Determine meeting room size requirements for each working group meeting and communicate that to the Meeting Planner.

4. Communicate working group meeting day, time, and location to the leaders of the working groups that will be meeting at the workshop.

5. Provide working group meeting schedule to the ESW Committee for including in printed materials and website

6. Obtain an attendee list from any working group meeting at the ESW and forward to the ESW Facility Chair before the end of the second day of the ESW. This will be used to compare with the hotel registration to ensure that the ESW is credited with all room night stays.

28.0 ESW Webmaster

The ESW Webmaster is appointed by the ESW Chair. This role may have a Vice-chair. The ESW Webmaster has the following responsibilities.

1. Participate in ESW Committee meetings.

2. Update ESW website throughout the year as needed as directed by the ESW Chair or Future ESW Chair.

3. Regularly verify the ESW website is properly operating.

4. Monitor ESW website statistics and share those statistics with the Committee.

5. Determine and implement ways to improve the look, feel, navigation ability, and content on the ESW website.

6. At the end of the workshop, remove unneeded information and prepare the ESW website for the next workshop.

7. Ensure ESW follows all appropriate IEEE website policies and procedures.

29.0 ESW EventMobi Chair

The ESW EventMobi Chair is appointed by the ESW Chair. This role may have a Vice-chair. The ESW EventMobi Chair has the following responsibilities.

1. Participate in ESW Committee meetings.

2. Create the EventMobi workshop event for the ESW. Use the previous year ESW event as a template.

3. Gather the required data for the event and update the ESW EventMobi event with that information. Refer to the ESW EventMobi Operating Manual for specific details.

4. Open the ESW EventMobi event approximately one month before the start of the ESW.

5. Provide a link to the ESW EventMobi event to the Future ESW Chair (for inclusion on the ESW website and ESW Social Media Chair (for use in ESW social media posts).

6. Provide the ESW Chair presentation information to include in the ESW opening remarks to explain to the audience how to access the ESW EventMobi event.

7. Create and initiate (as needed) polls and surveys needed to support the ESW.

8. Provide a summary to the ESW Committee of any polls or surveys performed using the EventMobi.

9. Close the ESW EventMobi event approximately one month after the conclusion of the ESW.

30.0 Committee Representative

The Committee Representative has the responsibility to communicate information between the ESW Committee and the Committee. This role is to help ensure good communications between those groups. The person is appointed by the Committee Chair. The person must be a member of the Committee Advisory and Nominations Subcommittee. This person may have an additional role on the ESW Committee.

The Committee Representative has the following responsibilities.

1. Participate in ESW Committee meetings.

2. Perform the liaison role between the ESW Committee and the Committee.

31.0 ESW Records

The ESW Committee has records that are valuable year to year to assist future ESW Committees in the planning of the annual workshop. The ESW Committee uses Google Drive as a location to store these important documents. Other than the ESW budget and the IEEE Audit Report, financial or registration documents that identify the amount of money paid or charged to any individual or organization should not be uploaded to this drive. This would include but is not limited to documents such as invoices, bank statements or payments.

Each ESW Committee member should upload all critical ESW planning documents to the appropriate section in the ESW Google Drive account. Below is a screenshot of part of the current file structure in Google Drive.
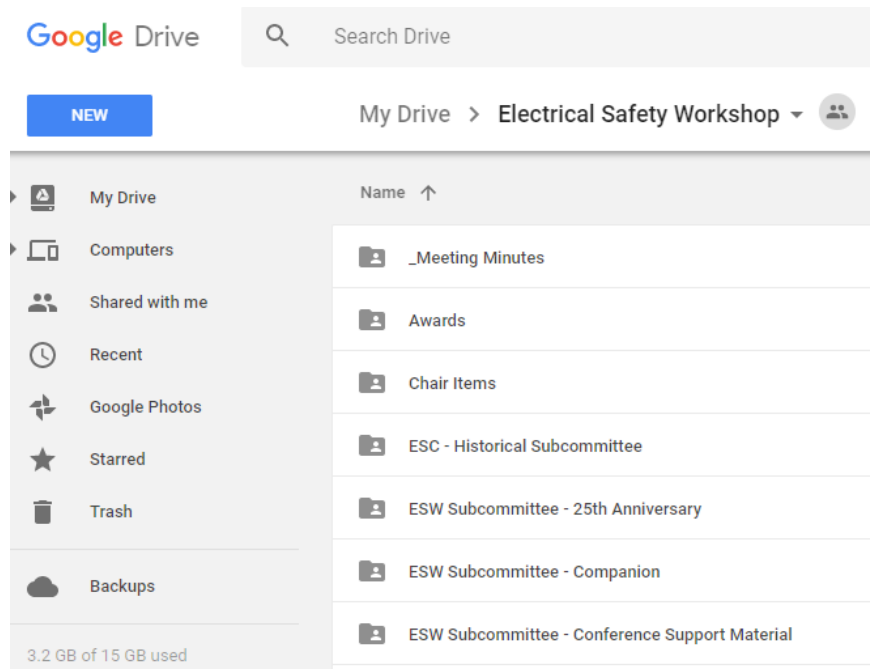
Each ESW Committee member should be provided access to the ESW Google Drive account for the folders that person needs access to. It's best for members to use a Google based email account for that access, such as a gmail.com address or ieee.org email address.

The Future ESW Chair has the responsibility to control drive access permissions. Personnel no longer on the ESW Committee should have permissions removed.

ESW Committee members should have their documents uploaded to Drive within one month of the conclusion of the workshop.

32.0 Revision History

September, 2021
- Completed minor editorial updates to the document based on the 2021 review of the document.

May, 2020
- Updated Table of Contents.
- Added Code of Conduct.
- Added requirement that all ESW Committee members should attend all ESW Committee meetings or send a report in advance to the ESW Chair and the ESW Secretary.
- Added information that ESW Committee conference calls should be scheduled one per month until 6 weeks prior to the ESW and then held every 2 weeks.
- Added information that ESW Committee conference calls should be chaired by the ESW Chair or, if not available, the Future ESW Chair following that the ESW Secretary.
- Added information from the follow up meeting should be assembled and acted on within 2 weeks of the end of the ESW.
- Track the Keynote Speakers name, year spoke and title of Keynote Speaker's presentation.