How to organize an IEEE Conference: Checklist & Timeline

- Detailed Conference Checklist (Pages 1-13)

- *At a Glance* Conference Timeline

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

Related Areas:	☑ Detailed Conference Checklist
Conference Finance	
Conference Publications	
Conference Contracts	
Conference Business Services	
Bold = Required	

☑	WHEN actions/tasks should be completed (Recommended Deadlines)	WHAT actions/tasks need to be done	HOW to complete (Required Docs/Templates)	WHO can I contact if I have questions?
	START	Determine and apply for sponsorship from all applicable IEEE and/or non-IEEE organizational units (OU)		IEEE Conference Business Services
	24 months BEFORE start date	Obtain sponsorship		IEEE organizational unit (OU) you are seeking sponsorship from
	24-18 months BEFORE start date	Appoint General Chair and Conference Committee		IEEE organizational unit (OU) you obtained sponsorship from
	24-18 months BEFORE start date	Contact the local IEEE Section of where the conference will be held		IEEE Conference Business Services

Related Areas:		
Conference Finance		
Conference Publications		
Conference Contracts		
Conference Business Services		
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☑ Detailed Conference Checklist

☑	WHEN actions/tasks should be completed (Recommended Deadlines)	WHAT actions/tasks need to be done	HOW to complete (Required Docs/Templates)	WHO can I contact if I have questions?
	24-18 months BEFORE start date *As soon as feasible - but no later than 18 months before the conference*	Register your conference with the IEEE, submit the **Conference Information Schedule & Committee List** to obtain a conference number, insurance coverage and be listed on the IEEE Conference Search and Call for Papers (CFP) listing. *Preliminary conference information you provide can always be updated. If you have any changes or updates, please contact us at conference-services@ieee.org*	**Conference Information Schedule & Committee List**	IEEE Conference Business Services
				IEEE Insurance
	24-18 months BEFORE start date	Set forth the relationship and obligations of all involved parties in a **Memorandum of Understanding (MOU), if applicable**	**Memorandum of Understanding (MOU), if applicable**	IEEE Conference Contracts
	24-18 months BEFORE start date	Contract conference management company, if applicable for site selection, registration management, conference logistics or exhibit management ***All conference contracts with a value of US $25,000 or greater must be reviewed by the IEEE Conference Contracts Dept. Conference contracts less than US $25,000 will be reviewed upon request.***	**Meeting Management Template, if applicable**	IEEE Conference Contracts
	24-18 months BEFORE start date	Select site and prepare contract with conference facility/venue and hotels ***All conference contracts with a value of US $25,000 or greater must be reviewed by the IEEE Conference Contracts Dept. Conference contracts less than US $25,000 will be reviewed upon request.***	**Contracts (Facility/Venue), if applicable**	IEEE Conference Contracts

	Related Areas:			
	Conference Finance		☑ **Detailed Conference Checklist**	
	Conference Publications			
	Conference Contracts			
	Conference Business Services			
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☑	**WHEN actions/tasks should be completed** (Recommended Deadlines)	**WHAT actions/tasks need to be done**	**HOW to complete (Required Docs/Templates)**	**WHO can I contact if I have questions?**
	24-18 months BEFORE start date	Review IEEE Insurance coverage and determine if additional coverage is required		IEEE Insurance
	24-18 months BEFORE start date	Review **tax information** to ensure Internal Revenue Service (IRS) and international compliance-VAT (Value Added Tax) and GST (Goods and Services Tax)	If VAT/GST related, please contact conference-tax@ieee.org	IEEE Conference Business Services
				IEEE Tax Compliance & Administration
	18-15 months BEFORE start date	Develop communications plan, marketing materials and conference website		IEEE Conference Business Services
				IEEE Intellectual Property Rights
	18-15 months BEFORE start date	Send request for proposal (RFP) to exhibit decorators and develop exhibitor prospectus, if applicable		Previous year's conference committee
	18-15 months BEFORE start date	Begin outreach to educational institutions, corporations, government and industry for support and patronage		Previous year's conference committee

	Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services **Bold** = Required	☑ **Detailed Conference Checklist**		

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	18-15 months BEFORE start date	Apply for grants for conference support		IEEE Development Office
	15-12 months BEFORE start date	Develop process/identify system for paper management		Previous year's conference committee
	15-12 months BEFORE start date	Develop technical program by determining topic areas, format and types of technical papers. Establish abstract submission, author notification and final paper submission deadlines.		Previous year's conference committee
	15-12 months BEFORE start date	Establish a Call for Papers (CFP)		Previous year's conference committee
	15-12 months BEFORE start date	Update conference website with a page/link about CFP information		Previous year's conference committee

	Related Areas: Conference Finance / Conference Publications / Conference Contracts / Conference Business Services / **Bold** = Required	☑ Detailed Conference Checklist		
☑	**WHEN actions/tasks should be completed** (Recommended Deadlines)	**WHAT actions/tasks need to be done**	**HOW to complete (Required Docs/Templates)**	**WHO can I contact if I have questions?**
	15-12 months BEFORE start date	Establish a Visa process for international attendees and post on the conference website ** Visa processing times vary, encourage attendees to plan ahead.		Previous year's conference committee
	15-12 months BEFORE start date *Earlier submission is strongly recommended*	Submit conference **budget with written approvals from all IEEE financial sponsoring organizational unit(s) (OUs)** for headquarter review	**IEEE Financial Web Form - Budget** with written approvals from all IEEE financial sponsoring organizational unit(s) (OUs)	IEEE Conference Finance
	15-12 months BEFORE start date	**General Chair and Finance Chair/Treasurer must complete and submit POBC/COI forms**	**Principles of Business Conduct Compliance Certificate and Conflict of Interest Disclosure Statement ((POBC/COI)** ▪ General Chair ▪ Finance Chair/Treasurer	IEEE Conference Finance
	15-12 months BEFORE start date	Submit updated committee list, if applicable	E-mail to conference-finance@ieee.org	IEEE Conference Finance

☑ Detailed Conference Checklist

☑	WHEN actions/tasks should be completed (Recommended Deadlines)	WHAT actions/tasks need to be done	HOW to complete (Required Docs/Templates)	WHO can I contact if I have questions?
	15-12 months BEFORE start date	Establish **conference bank account** for receipt and disbursement of conference funds	**IEEE Concentration Banking**	IEEE Conference Finance
				IEEE Concentration Banking
			Bank Signature Cards [when local bank is being used]	IEEE Conference Finance
			Fiscal Agent (Bank MOU) [for 3rd party ledger accounts]	IEEE Conference Finance
	*The sole sponsor and co-sponsoring organizational units may issue advances to their conferences **anytime** during its life cycle. **Up to the conference start date***	Request and obtain loan from sponsoring organizational unit (OU), if needed		IEEE Conference Finance

Related Areas:	☑ Detailed Conference Checklist		
Conference Finance			
Conference Publications			
Conference Contracts			
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☑	WHEN actions/tasks should be completed (Recommended Deadlines)	WHAT actions/tasks need to be done	HOW to complete (Required Docs/Templates)	WHO can I contact if I have questions?
	Submit **Pre- and Post-Conference forecasts** by November 30th of each calendar year for accrual purposes.	Submit **Pre- and Post- Conference forecasts**		IEEE Conference Finance
	Between set up and close of conference	Secure W-8 and/or W-9 forms for tax compliance. Individuals receiving payment from IEEE must complete either a W-8 and/or W-9 form.	**W-8 & W-9 Forms**	IEEE Conference Finance
	No later than January 10th of each year for all payments made in the previous calendar year	**Complete 1099 and 1042 forms for all payments made in the previous calendar year. If no payments were made, 1099 and 1042 should still be submitted indicating "NONE".**	**1099 & 1042 Schedule of Payments**	IEEE Conference Finance
	No later than January 10th of each year for all payments made in the previous calendar year	**Submit annual report on foreign bank accounts to IEEE Tax Dept.**		IEEE Tax Compliance & Administration
	15-12 months BEFORE start date	Promote Call for Papers (CFP) and exhibit prospectus at current year's conference, if applicable		Previous year's conference committee

	Related Areas:			
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	Conference Publications			
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	15-12 months BEFORE start date	Review and reconfirm hotel, meeting space and room block		Previous year's conference committee
	15-12 months BEFORE start date	Meet with previous year's conference committee to discuss best practices		Previous year's conference committee
	12-9 months BEFORE start date	Submit **Conference Publication Form** to obtain Letter of Acquisition (LOA) which includes the IEEE Catalog Number, Library of Congress Number, the International Standard Book Numbers (ISBN) and International Standard Serials Number (ISSN), if applicable	**Conference Publication Form**	IEEE Conference Publications
	12-9 months BEFORE start date	Register for PDF eXpress which allows conference organizers and authors to convert application formats to IEEE Xplore-compatible PDFs, optional tool	**IEEE PDF eXpress (optional)**	IEEE Conference Publications
	12-9 months BEFORE start date	Register for **Electronic IEEE Copyright Form (eCF)** if proceedings are acquired by the IEEE	**Electronic IEEE Copyright Form (eCF)**	IEEE Intellectual Property Rights
	12-9 months BEFORE start date	Create website/link for paper submissions for authors that hosts the pub schedule, submission instructions, copyright agreement, frequently asked questions (FAQs) and contact info. Work with paper management company, if applicable.		Previous year's conference committee
	12-9 months BEFORE start date	Secure permission from related IEEE OUs to market to their members using e-Notice		IEEE Conference Business Services

	Related Areas: Conference Finance Conference Publications Conference Contracts Conference Business Services **Bold** = Required	☑ **Detailed Conference Checklist**		
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	9-6 months BEFORE start date	Create registration form and establish a method for registration collection that is **Payment Card Industry (PCI) compliant**. Request IEEE membership verification CD to confirm valid IEEE Members.		Previous year's conference committee
				IEEE Payment Card Industry (PCI) Compliance
				IEEE Conference Credit Card Processing
				IEEE Conference Business Services
	9-6 months BEFORE start date	Plan social activities and tour program, if applicable		Previous year's conference committee
	9-6 months BEFORE start date	Send out RFPs for ground transportation and finalize contract, if applicable		Previous year's conference committee
	6-4 months BEFORE start date	Launch registration site		Previous year's conference committee
	6-4 months BEFORE start date	Complete paper review process. Finalize technical program. Notify speakers.		Previous year's conference committee
	6-4 months BEFORE start date	Create and publish advanced program		Previous year's conference committee
	4-3 months BEFORE start date	Solicit bids from printers and/or CD manufacturers based on accepted papers		Previous year's conference committee
	4-3 months BEFORE start date	Organize and prepare for production of conference publications per Letter of Acquisition (LOA)		IEEE Conference Publications

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	4-3 months BEFORE start date	Order attendee giveaways, speaker gifts, and/or conference shirts.		Previous year's conference committee
	4-3 months BEFORE start date	Determine preliminary exhibitor space assignments, if applicable		Previous year's conference committee
	4-3 months BEFORE start date	Request weekly reports from hotel(s) regarding rooms		Your Hotel(s)
	2 months BEFORE start date	Review room block with hotel(s) against attendance and contract(s)		Your Hotel(s)
	2 months BEFORE start date	Complete & print final program, advertising/publicity and registration reminders.		Previous year's conference committee
	2 months BEFORE start date	Develop & finalize volunteer job functions/onsite needs.		Previous year's conference committee
	6-4 weeks BEFORE start date	Deadline for early registration (predetermined date)		Previous year's conference committee
	6-4 weeks BEFORE start date	Send prelim specifications [set up, catering, audio visual (AV)] to conference site. Order signage and recognition products (plaques, certificates and awards).		Previous year's conference committee
	6-4 weeks BEFORE start date	Ship final program to conference site		Your Conference Site (Facility/Venue)

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	6-4 weeks BEFORE start date	Submit **Pre-Conference forecast**		IEEE Conference Finance
	2 days BEFORE start date	Confirm onsite logistics with venue (registration, exhibits, meeting rooms, food & beverage)		Previous year's conference committee
	2 days BEFORE start date	Set-up registration area, exhibit space, information booth, office area.		Previous year's conference committee
	HOLD CONFERENCE **Conference Start & End Dates**	**Onsite registration**		
		Monitor budget		
		Monitor daily activities and adjust onsite logistics as needed		
		Hold Post-Conference Wrap Up Meeting		
	1 week but no later than 30 days AFTER end date	**Submit Conference Proceedings/Content (Xplore CD and other media types) per Letter of Acquisition (LOA)**		IEEE Conference Publications
	1 week AFTER end date	Committee members submit final statistics and lessons learned to sponsoring IEEE OU		IEEE organizational unit (OU) you obtained sponsorship from
	20 days AFTER end date	Registration clean up (process refunds, receipts and balances due)		
	1 month AFTER end date	Process outstanding bills		

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	1 month AFTER end date	**Repay all loans**		IEEE Conference Finance
	1 month AFTER end date	Submit **Post-Conference forecast**		IEEE Conference Finance
	3 months AFTER end date	**Distribute surplus**		IEEE Conference Finance
	3 months AFTER end date	**Close conference bank account & submit proof of account closure**	**Closing of Bank Accounts/Destroy Unused Checks Form for Concentration Banking Accounts**	IEEE Conference Finance
	4-5 months AFTER end date	Prepare and submit all audit material to independent auditor *Co-sponsored conferences, where IEEE has a 50% or less financial responsibility shall be encouraged to participate in the audit process. Conferences where IEEE has greater than a 50% financial responsibility, including conferences that are solely IEEE sponsored, and where the actual or budgeted income or expense is $100,000 or more must be audited by a professional independent source, outside the sponsoring organizational unit.*	**Audit Report, if applicable**	IEEE Conference Finance / IEEE Operations (Internal) Audit
	3-6 months AFTER end date	Submit **final financial report with Certification of Accuracy**	**Final Financial & Certification of Accuracy**	IEEE Conference Finance

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Contact IEEE Staff:

Department	Phone	E-mail
IEEE Conference Business Services	+1 732 562 3878	conference-services@ieee.org
IEEE Conference Contracts	+1 732 562 6826	conference-contracts@ieee.org
IEEE Conference Finance	+1 732 562 3878	conference-finance@ieee.org
IEEE Concentration Banking	+1 732 562 5363	concentration-banking@ieee.org
IEEE Insurance	+1 732 562 5541	ieeeinsurance@ieee.org
IEEE Operations (Internal) Audit	+1 732 562 6371 or 6533	ops-audit@ieee.org
IEEE Tax Compliance & Administration	+1 732 562 5334	tax-staff@ieee.org
IEEE Payment Card Industry (PCI) Compliance	+1 732 562 5322	s.stiles@ieee.org
IEEE Conference Credit Card Processing	+1 732 562 3981	j.punsal@ieee.org
IEEE Conference Publications	+1 732 562 3872 or 3875 or 6386	confpubs@ieee.org
IEEE PDF eXpress	+1 732 465 5888	pdfsupport@ieee.org
IEEE Intellectual Property Rights	+1 732 562 3966	copyrights@ieee.org
IEEE Development Office	+1 732 562 3860	k.galuchie@ieee.org

CONFERENCE TIMELINE

PRE-CONFERENCE | HOLD CONFERENCE | POST-CONFERENCE

START	24 MONTHS	24-18 MONTHS	18-15 MONTHS	15-12 MONTHS	12-9 MONTHS	9-6 MONTHS	6-4 MONTHS	4-3 MONTHS	2 MONTHS	6-4 WEEKS	2 DAYS
Determine and apply for sponsorship from all applicable IEEE and/or non-IEEE organizational units (OU)	Obtain Sponsorship	Appoint General Chair and Conference Committee	Develop communications plan, marketing materials and conference website	Develop process/identity system for paper management	Submit **Conference Publication Form** to obtain Letter of Acquisition (LOA)	Create registration form and ensure registration service is **Payment Card Industry (PCI) compliant**	Launch registration site	Solicit bids from printers and/or CD manufacturers based on accepted papers	Review room block with hotel against attendance and contracts	Deadline for early registration	Confirm onsite logistics with venue
		Contact the local IEEE Section	Send request for proposal (RFP) to exhibit decorators and develop exhibitor prospectus, if applicable	Develop technical program, establish paper submission process and deadlines	Register for PDF eXpress (optional)	Plan social activities and tour program, if applicable	Complete paper review process. Finalize technical program. Notify speakers.	Organize and prepare for production of conference publications per Letter of Acquisition (LOA)	Complete and print final program, advertising/publicity and registration reminders	Send prelim. specifications to conference site. Order signage and recognition products.	Set-up registration area, exhibit space, information booth, office area
		Register your conference, submit **Conference Information Schedule & Committee List**	Begin outreach to educational institutions, corporations, government and industry for support and patronage	Establish a Call For Papers (CFP)	Register for Electronic IEEE **Copyright Form** (eCF) if proceedings are acquired by IEEE	Send out RFPs for ground transportation and finalize contract, if applicable	Create and publish advanced program			Ship final program to conference site	
		Submit **Memorandum of Understanding (MOU), if applicable**	Apply for grants for conference support	Update conference website with page/link about CFP information	Create website for paper submissions. Work with paper management company, if applicable			Order attendee giveaways, speaker gifts, and/or conference shirts	Develop and finalize volunteer job functions/onsite needs.	**Submit Pre-Conference forecast**	
		Contract conference management company, if applicable		Establish a Visa process for international attendees and post on the conference website	Secure permission from related IEEE OUs to market to their members using e-Notice			Determine preliminary exhibitor space assignments, if applicable			
		Site selection and **contract review, if applicable**		Submit conference **budget with written IEEE OU approval(s)** for headquarter review				Request weekly reports from hotels on room block.			
		Review IEEE Insurance coverage and determine if additional coverage is required		Submit **Principles of Business Conduct Compliance Certificate and Conflict of Interest Disclosure Statement (POBC/COI) forms**							
		Review tax information to ensure IRS and international compliance VAT and GST		Submit updated committee list							
				Establish **conference bank account(s)**							

Request and obtain loan from OU, if needed

Pre-and Post Conference forecasts [Submit Pre- and Post- Conference forecasts by November 30th of each calendar year for accrual purposes.]

Secure **W-8 and/or W-9 forms** for tax compliance

1099 & 1042 Schedule of Payments [No later than January 10th of each year for all payments made in the previous calendar year.]

Submit annual report on foreign bank accounts to IEEE Tax Dept. [No later than January 10th of each year for all payments made in the previous calendar year.]

Promote CFP and exhibit prospectus at current year's conference, if applicable

Review and reconfirm hotel, meeting space and room block

Meet with previous year's committee to discuss best practices

HOLD CONFERENCE

- Onsite Registration
- Monitor Budget
- Monitor Daily Activities
- Hold Post-Conference Wrap Up Meeting

POST-CONFERENCE

1 WEEK	20 DAYS	1 MONTH	3 MONTHS	4-5 MONTHS	5-6 MONTHS
Submit Conference Proceedings/Content (Xplore CD and other media types) per LOA			Distribute surplus	Prepare and submit all audit material to independent auditor	
Committee members submit final statistics and lessons learned to OU	Registration clean up (process refunds, receipts and balances due)	Process outstanding bills	**Close conference bank account & submit proof of account closure**	**Audit Report** for >$100K and/or IEEE OU total is 51%+ co-sponsor	
		Repay all Loans	Submit **final financial report with Certification of Accuracy**		
		Submit Post-Conference forecast			

*Disclaimer: This timeline is for planning purposes only.

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