

**CHECKLIST FOR ORGANIZING:
IEEE CANADIAN CONFERENCES:
CCECE, EPEC, & IHTC**

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1.0 CONFERENCE ORGANIZING COMMITTEE

The following list is the minimum proposed for this conference:

- Technical Program Committee
- Publications Committee
- Publicity and Public Relations Committee
- Finance Committee
- Registration Committee
- Local Arrangements Committee
- Student, Affinity and Other Committee Activities (i.e., Industry, Humanitarian, Women in Engineering, Consultants Network, Professional Development, etc.)
- Exhibits Committee (when needed)

2.0 Conference Committee Duties

The Conference Committee shall:

- Select a theme for the conference.
- Bid for the conference providing the details in the IEEE Canada CONAC Expression of Interest template. Use the established fees table for conference registration, tutorials, partners etc. when preparing the draft budget.
- Once CONAC awards you the conference:
 - Notify IEEE Canada Conference Advisory Committee (CONAC) of the dates, location and conference organizing committee members. Once CONAC has awarded you the conference, then inform IEEE Meetings, Conferences and Events (MCE)
 - Complete and submit the Memorandum of Understanding (MOU) to IEEE Canada.
 - Submit all contracts valued at \$25,000 and greater to IEEE Canada CONAC for approval.
 - Finalize the structure of the conference i.e. plenary sessions, symposia, tutorials, special sessions, etc.
 - Hold meetings as necessary to ensure that satisfactory progress is being made.
 - Report regularly to IEEE Canada, through the CONAC chair, on the progress of the conference organization.

3.0 FINANCE COMMITTEE TASKS

The Conference Committee shall:

- Prepare the budget
- Determine the amount of seed funding required
- Submit the budget & requests for seed funding to the sponsoring entities for review and approval
- Submit the budget to IEEE Canada CONAC chair for final approval
- Open an IEEE Concentrated Banking bank account once awarded the conference and the conference has been registered with IEEE MCE.
- Obtain a GST/HST/Business number

- Record all financial transactions in detail within the Budget and Financial reporting spreadsheet provided by CONAC.
- Obtain an Audit
- Repay seed funding within one month after the conference
- Close conference bank accounts within six months of conference end.
- Distribute surplus funds as per MOU
- Prepare detailed final financial report - 6 months after conference

4.0 TECHNICAL PROGRAM & PUBLICATIONS COMMITTEE

The **Publications** Committee is responsible for all publications of the Conference:

- Set-up the paper handling system in EDAS
- Prepare Publicity flyers
- Prepare and have issued the Call for papers, presentations, tutorials, workshops & co-located events
- Advance and final programs
- Obtain IEEE Catalogue, ISBN, and Library of Congress numbers for the Proceedings
- Provide a Table of Contents & Index for the Proceedings
- Select an appropriate cover for both Proceedings and Programs
- Set up electronic templates whenever possible (e.g. for stationary, final paper format)
- Prepare conference proceedings on CD-ROM
- Request bids for the various publications

The **Technical Programs Committee** shall undertake:

- Set a time-table for receipt of abstracts & final papers
- Develop template for Technical Paper Submissions
- Recruit paper review committee members
- Inform Authors of all selected papers
- Check the final papers against the advance program
- Develop Special Paper requirements and obtaining papers
- Develop Conference Technical Program

5.0 REGISTRATION COMMITTEE

The Registration committee shall:

- Determine registration process, i.e. in-house or contracted services.
- Prepare RFP for registration services and review proposals.
- Prepare information for registration webpage.
- Assist registrants with obtaining visas to enter Canada, and register the conference with Canada Immigration and Canada Customs.
- Obtain registrants' gifts, conference bags, tourist information, etc.
- Assist with selection and purchase of gifts for speakers, special guests and others as required.

- Prepare name badges for all attendees.
- Prepare attendee package, including registration receipt, etc.
- Plan registration layout and process for efficient clearing of registrants.

6.0 PUBLICITY & PROMOTIONS COMMITTEE

The Publicity and promotions committee shall be responsible for:

- Prepare and execute on a publicity and promotions plan including:
 - Prepare Conference Website using the IEEE Canada CONAC template and keep it up-to-date
 - Prepare Conference Promotion materials
 - Prepare Email lists and send out eblasts
 - Prepare and issue media releases and advisories
- Protect the IEEE Canada and conference brands by incorporating the logos in the publicity and promotion medias

7.0 LOCAL ARRANGEMENTS

The Local Arrangements Chair and Subcommittees appointed shall carry out responsibilities in the following areas:

- Contract with meeting facilities (Plenary, Breakout, meals, Functions, Exhibits, etc) (note to seek CONAC approval first on items costing or incurring liability of \$25k or more)
- Prepare Signage requirements (Banners, Breakout Sessions, Functions, etc)
- Arrange for the Audio-Visual requirements (IEEE Canada may have data projectors and other tools for use)
- Arrange for accommodating Committee Meeting during the planning and conference execution
- Arrange for Communications and Internet access
- Arrange Social / Partners Program (if required)
- Contract for the Menu selection for all functions after negotiating the Food and Beverage requirements
- Coordinate IEEE Canada Awards Banquet requirements (consult with CONAC for special events tagged to the conference)
- Contract for Hotel Arrangements (including room assignments)
- Contract for Security to the degree needed to protect persons or properties

9.0 FUNDRAISING

- Prepare list of potential conference Sponsors (IEEE entities only), Patrons (non-IEEE entities), Supporters (non & not-for-profits), and Exhibitors
- Prepare Opportunities for Support and set value levels
- Prepare the Patron and Exhibition Package

- Follow-up with prospective patrons and exhibitors by letter, e-mail, or better yet face-to-face or at least by phone
- Update CONAC on all activities

10.0 STUDENT, AFFINITY AND OTHER COMMITTEE ACTIVITIES

- Involve the various IEEE Canada student, affinity and other committee chairs in providing conference program content for their specialty areas (either individually or collectively)
- Orchestrate these groups and provide support in organising their events at the conference
- Keep other Conference Committee chairs informed and involved as needed.

11.0 VOLUNTEERS

- Develop volunteer tasks
- Determine number of volunteers required
- Recruit and train volunteers from:
 - Section/Chapter members
 - Graduate Students
 - University and College students
 - Life members

12.0 DURING THE CONFERENCE

- Monitor Registrations
- Monitor Budget
- Adjust F & B Requirements
- Meet with Venue Staff
- Obtain and React to Feedback from Participants
- Address all contentious issues
- Meet with Next Years Conference Team Members
- Hold Wrap Up meeting with Venue Staff
- Adjust Technical Program to accommodate “no-shows”

13.0 CONFERENCE CLOSE-OUT

Once the Conference is over:

- Forward proceedings to IEEE
- Review and Pay Invoices
- Review Registration Data
- Process any Refunds
- File for GST/HST rebate
- Send Out Thank You Letters
- Arrange for Professional Audit

- Complete and submit the CONAC Wrap-Up report template

Conference Closing Process

- Complete Financial Reporting Workbook and submit to IEEE CONAC
- Repay all Seed Funding
- Distribute surplus to Sponsoring Entities
- Destroy all unused cheques (if applicable)
- Close GST/HST Account
- Forward the following information to IEEE MCE and CONAC:
 - Proof of Bank Account Closer
 - Copy of Conference Audit

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