

# Conference Toolkit

## CONTENTS

Organizing Committee Contact List Template  
Budget Template  
Important Links  
Post Conference  
ComSoc Staff Assignments

Please use these materials to guide you in planning your conference. For assistance, please refer to the ComSoc Staff List to find out who your ComSoc liaison is for the conference you are organizing.

# Note to Organizers

This toolkit is meant to help you organize your conference. Please also refer to your ComSoc Conference Planner or Project Manager to assist you. You can find the assigned planner in the [ComSoc Conference Assignment slide](#).

Please note these requirements:

1. You must have a mandatory meeting to kick off the conference planning. Attendees required are the conference General Chair, the Finance Chair, the ComSoc Finance Director, and the ComSoc Conference Planner. If you have a Local Arrangements Chair and/or a PCO, their attendance is also required.
2. Members of the conference organizing committee are not permitted to enter or sign any contracts on behalf of IEEE or ComSoc, unless the ComSoc Conference Planner/Project Manager has been consulted.
3. If your PCO has started work prior to the contract being signed, please let the ComSoc Planner know so that IEEE Legal can be informed.

# STEP ONE: Forms

- Conference Application: <https://www.ieee.org/conferences/organizers/conf-app.html>
- Compliance Form (must be completed by the **Conference General Chair(s)** and **Conference Finance Chair**): <https://www.ieee.org/about/compliance/conflict-of-interest/coiandpob.html>
  - Note: Where it says to select one of the following group names, please select: *Conference Business Operations*
- Publication Form (must be completed by the **Publications Chair** after application is approved): <https://www.ieee.org/conferences/organizers/conf-app.html?appName=Publication>

# STEP TWO: Committee

Complete the following document and send it to your ComSoc Conference Planner:

- Organizing Committee Contact List (here is a link to an OC Committee Contact List [template](#) for assistance)

# STEP THREE: Budget

Complete the [Budget Template](#)

1. Please look at Line 2 and specify the currency used in the conference budget in box G2 and an indicative exchange rate in box U2. All expenses and revenues entered in this currency on the left side will also be shown in USD on the right side. This eases comparisons between different conferences.
2. After entering your expenses and revenue, please look at the tab labeled "Summary", line 41. ComSoc requires a 20% surplus. If you are below 20%, please revisit your expenses, or consider raising your registration fees.
3. Regarding registration vendors, you are welcome to use your own. IEEE typically uses Cvent. If you plan to use Cvent, please enter these costs:
  - Site Build – No cost
  - Attendee processing - \$14 per registrant
  - Shipping - \$700
  - On-site Registration Staff (Optional) - \$600 Per Day, plus travel expenses

# STEP FOUR: Web Site Requests

**Website Requests** cannot be made until the Conference Application has been submitted and a **conference ID number** has been generated.

Once ICT has prepared the website for your webmaster to update, it cannot go live until it has been approved by ComSoc Marketing. Here is what ComSoc Marketing will check on your site:

1. **Five Slider Banners / Image permissions:** Usually 3 destination images and 2 tech images.
  - i. You can search for such images on [www.shutterstock.com](http://www.shutterstock.com) so long as the image does NOT say “**Editorial Use Only**”. Please send the URLs of your choices to the ComSoc Conference Planner.
  - ii. If you plan to use your own images, please provide the name of the person who should receive credit to each photo. Each image should have caption such as "Photo courtesy of John Smith". Also, please obtain confirmation of his/her permission to use.
2. **Important Dates:** These dates could be proposal deadlines such as Call for Papers, Call for Workshops, Call for Tutorials, etc. If you do not have this information, please let the ComSoc Conference Planner know.

# STEP FOUR: Web Site Requests

3. **Committee List:** Please provide the list of the Organizing Committee (at minimum, the General Chair(s), TPC Chair(s), Finance Chair and Web Chair/Webmaster.

*Example:*

**John Smith**

**IEEE Communications Society, USA**

- i. Option 1: List Only - Please list name, affiliation, country.
- ii. Option 2: List and Photos - Photos may be added after the launch of the web site. For all photos or images, please ask your ComSoc Conference Planner for the permissions form. For committee photos, please make sure the photos are:
  - i. JPEG format and high-resolution
  - ii. Not stretched or manipulated
  - iii. Profile is front-facing
  - iv. No other people in the background
  - v. Fairly recent (within past 5 years)

4. **Content on About page:** For your reference, please see the “About” page of the previous year’s conference.

5. **Content on Home page:** This is a Welcome Message on the home page. For your reference, please see the “Home” page of the previous year’s conference.

# **STEP FIVE: Kick-Off Meeting**

Schedule your Mandatory Kick-Off Meeting to clarify roles and responsibilities, and the action points for all. This meeting should include the following attendees:

- Conference General Chair
- Conference Finance Chair (and Local Arrangements Chair and PCO, if there is one)
- ComSoc Finance Director, Bruce Worthman
- ComSoc Conference Planner



# Patron Packages

As soon as you develop your packages, please post them on your conference website and please share with you ComSoc Conference Planner.

Once you have secured a patron:

- Provide your ComSoc Conference Planner with contact name and information, as well as patronage level so that an agreement can be created either by ComSoc Staff or the PCO.
- Request from patron their logos in JPEG **AND** EPS/Vector format for website and marketing materials

# Important Links

As you plan your conference, please know that other ComSoc resources are available to assist you.

- ComSoc Marketing: [comsocmarketing@comsoc.org](mailto:comsocmarketing@comsoc.org)
  - Specify in subject line which conference
- Webmaster Support: Please use **ComSoc Ticketing System**, otherwise please contact your ComSoc Conference Planner.

# Post Conference

After the conference:

- Please complete the [Fast Facts Post Conference Form](#) provided by your ComSoc conference planner
- Please complete final steps in the publication process for inclusion in IEEE Xplore (such as formatting, marking no-shows, etc.). For assistance, please email [conference-ops@ieee.org](mailto:conference-ops@ieee.org)

# Conference Assignment

