

## **DOCTORAL CONFERENCE**

DoCEIS'2024

## **ORGANIZATION LOGISTICS**

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PHD PROGRAM IN ELECTRICAL AND COMPUTER ENGINEERING

## **ORGANIZATION LOGISTICS : GOAL**

Provide some specific guidelines  
(and topics for debate) on how to organise  
our Doctoral Conference – 2024 edition.

➤ Different types of conferences have different constraints and require different types of approaches

➤ Some examples:

- IEEE, IFAC, IFIP, ACM sponsored conferences
- WSEAS, IASTED sponsored conferences
- Steering Committee based conferences
- New initiatives

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NOVA CON F E R E N C E T I M E L I N E																	
P R E - C O N F E R E N C E												HOLD CONFERENCE	P O S T - C O N F E R E N C E				
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		1 WEEK	20 DAYS	1 MONTH	3 MONTHS	4-5 MONTHS
<p>Determine and apply for sponsorship from all applicable IEEE and/or non-IEEE organizational units (OU)</p> <p>Obtain Sponsorship</p> <p>Appoint General Chair and Conference Committee</p> <p>Develop communications plan, marketing materials and conference website</p> <p>Develop technical program, establish paper submission process and deadlines</p> <p>Send request for proposal (RFP) to exhibit decorators and develop exhibitor prospectus, if applicable</p> <p>Begin outreach to educational institutions, corporations, government and industry for support and patronage</p> <p>Apply for grants for conference support</p> <p>Establish a Visa process for international attendees and post on the conference website</p> <p>Secure permission from related IEEE OUs to market to their members using e-Notice</p> <p>Submit Principles of Business Conduct Compliance Certificate and Conflict of Interest Disclosure Statement (POBC/COI) forms</p> <p>Submit updated committee list</p> <p>Establish conference bank accounts</p> <p>Request and obtain loan from OU, if needed</p> <p>Pre-and Post Conference forecasts [Submit Pre- and Post- Conference forecasts by November 30th of each calendar year for accrual purposes.]</p> <p>Secure W-9 and/or W-9 forms for tax compliance</p> <p>1099 &amp; 1042 Schedule of Payments [No later than January 10th of each year for all payments made in the previous calendar year.]</p> <p>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.]</p> <p>Promote CFP and exhibit prospectus at current year's conference, if applicable</p> <p>Review and reconfirm hotel, meeting space and room block</p> <p>Meet with previous year's committee to discuss best practices</p>	<p>Register your conference</p> <p>Submit Conference Information Schedule &amp; Committee List</p> <p>Submit Memorandum of Understanding (MOU), if applicable</p> <p>Contract conference management company, if applicable</p> <p>Site selection and contract review, if applicable</p> <p>Review IEEE Insurance coverage and determine if additional coverage is required</p> <p>Review tax information to ensure IRS and international compliance via e-Notice</p>	<p>Register for Electronic IEEE Copyright Form (E-ICF) if proceedings are acquired by IEEE</p> <p>Create website for paper submissions. Work with paper management company, if applicable</p> <p>Secure permission from related IEEE OUs to market to their members using e-Notice</p>	<p>Develop process/identify system for paper management</p> <p>Develop technical program, establish paper submission process and deadlines</p> <p>Update conference website with page/link about CFP information</p> <p>Establish a Visa process for international attendees and post on the conference website</p> <p>Submit conference budget with written IEEE OU approval(s) for bookkeeper review</p> <p>Submit Principles of Business Conduct Compliance Certificate and Conflict of Interest Disclosure Statement (POBC/COI) forms</p> <p>Submit updated committee list</p> <p>Establish conference bank accounts</p>	<p>Submit Conference Publication Form to obtain Letter of Acquisition (LOA)</p> <p>Register for PDP alpha (optional)</p> <p>Register for Electronic IEEE Copyright Form (E-ICF) if proceedings are acquired by IEEE</p> <p>Create website for paper submissions. Work with paper management company, if applicable</p> <p>Secure permission from related IEEE OUs to market to their members using e-Notice</p>	<p>Create registration form and ensure registration service is Payment Card Industry (PCI) compliant</p> <p>Plan social activities and tour program, if applicable</p> <p>Send out RFPs for ground transportation and finalize contract, if applicable</p> <p>Work with paper management company, if applicable</p> <p>Secure permission from related IEEE OUs to market to their members using e-Notice</p>	<p>Launch registration site</p> <p>Complete paper review process, finalize technical program. Notify speakers.</p> <p>Create and publish advanced program</p> <p>Order attendee giveaways, speaker gifts, and/or conference shirts</p> <p>Determine preliminary exhibitor space assignments, if applicable</p> <p>Request weekly reports from hotels on room block.</p>	<p>Solicit bids from printers and/or CD manufacturers based on accepted papers</p> <p>Organize and prepare for production of conference publications per Letter of Acquisition (LOA)</p> <p>Develop and finalize volunteer, advertising/publicity and registration reminders</p> <p>Develop and finalize volunteer, advertising/publicity and registration reminders</p>	<p>Review room block with hotel against attendance and contracts</p> <p>Complete and print final program, advertising/publicity and registration reminders</p> <p>Develop and finalize volunteer, advertising/publicity and registration reminders</p>	<p>Deadline for early registration</p> <p>Send prelim. specifications to conference site. Order signage and recognition products.</p> <p>Ship final program to conference site</p> <p>Submit Pre-Conference forecast</p>	<p>Confirm onsite logistics with venue</p> <p>Set-up registration area, exhibit space, information booth, office area</p> <p>Order signage and recognition products.</p> <p>Ship final program to conference site</p> <p>Submit Pre-Conference forecast</p>	<p>Onsite Registration</p> <p>Monitor Budget</p> <p>Monitor Daily Activities</p> <p>Hold Post-Conference Wrap Up Meeting</p>	<p>Submit Conference Proceedings/Content (Optimize CD and other media types) per LOA</p> <p>Committee members submit final statistics and lessons learned to OU</p> <p>Registration clean up (process refunds, receipts and balances due)</p> <p>Process outstanding bills</p> <p>Repay all Loans</p> <p>Submit Post-Conference forecast</p>	<p>Distribute surplus</p> <p>Prepare and submit all audit material to independent auditor</p> <p>Audit Report for 25 (OU) and/or IEEE OU total is \$1M+ co-sponsor</p> <p>Submit final financial report with Certification of Accuracy</p>	<p>Close conference bank account &amp; submit proof of account closure</p>			
	<p><b>TIMELINE KEY</b></p> <ul style="list-style-type: none"> <li>Conference Finance</li> <li>Conference Publications</li> <li>Conference Contracts</li> <li>Conference Business Services</li> <li><b>Boldface = Required</b></li> </ul>																
	<p><small>*Disclaimer: This timeline is for planning purposes only.</small></p>																
	<p><small>IEEE Conference Business Services 2008</small></p>																

- Publicity / dissemination of *Call for Papers* (CfP)
- Webpage (interacting with other activities)
- e-mail admin
  
- Regular organization (face-to-face format)
  - Location selection (interacting with other activities)
  - Social Events and F&B
  - Arrangements for Invited Speakers
  - Participant kits
  - Planning of on-site secretariat and technical logistics
  
- Organization supporting hybrid format
  - Platform selection (interacting with other activities)
  - Participant kits
  - Planning of on-site technical logistics

- Define dissemination strategy:
  - Time planning
  - Activities for Call for Papers (CfP) dissemination
    - Using direct contacts
    - At other conferences
    - Using e-mails
- Setting-up dissemination mailing lists
- **Plenty of room to innovate!!!** → launch new specific activities addressing new ways to disseminate and get people involved

- This is an activity that needs to integrate recommendations and information provided by all committees.
- The website is the entry point for all potential authors and attendees!!!
- Website main purpose:
  - To help visitors to the site accomplish their tasks
  - To help the organization achieve its strategic goals

- Comparison of current available platforms to support hybrid events:
  - Zoom,
  - WebEx,
  - Google Meet,
  - Microsoft Teams,
  - Big Blue Button, ...
- Several constraints need to be considered:
  - Number of parallel lecture rooms needed
  - Costs for rooms and services
  - Payment procedures

- A number of constraints need to be considered:
  - Number and type of conference rooms needed
  - Accessibility using public transportation
  - Costs for rooms and services
  - Accommodation for participants  
(provide accommodations at different price classes with easy access from conference location)
  - Travelling, dietary, religious observances, people with disabilities, etc.

- Recommending a suitable program of social activities;
- Arranging and hosting of all official lunches, dinners and social events;
- Arranging a suitable program to cater for accompanying persons during the conference (?...);
- Making all social arrangements in connection with invited speakers;
- Planning and organizing appropriate social activities to be held during conference week (for instance technical visits, if adequate)
- Preparing and keeping an up-to-date budget in respect of its activities, notifying the Finance Subcommittee of changes to its budget, and ensuring expenditure is within budgeted approvals.

- Remember most people attending, even locals, may be visiting the site for the first time and clear signage (and plenty of it) is very important.
- Provide separate registration facilities for those that have prepaid from those that have to pay or who have queries about money.
- Registration packets should be standard, with individual specific material in a separate envelope.
- Setup internet access for participants.
- Make sure organizers' representatives are always present during presentations so that equipment failures can be fixed immediately.
- Assure evaluation questionnaires (participants and session chairs) (under control of Associated Activities Group).

- Website and dissemination
  - Dissemination of CfP
  - email admin
  - Webpage
- Location (and Platform?) selection
- Social aspects
  - Social Events and F&B
  - Arrangements for Invited Speakers
- Conference
  - Participant kits
  - Planning of training activities
  - Planning of on-site technical logistics