**Steps for Holding an IEEE Full Day Workshop**

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**In preparation:**

* 6+ months in advance:
* Propose the event in broad terms (date, topics, audience, # parallel sessions, # speakers – local and travelers) and get Section (Council) buy-in & budgetary Section funding.
* Form a team to bring the event to fruition (3-4 volunteers, or more)
* By 5 months in advance:
* team member specific roles defined
* Candidate venues identified (hotel | university | company | other) and assign responsibility for obtaining preliminary quotes
* establish budget and identify potential funding sources (Section, Region, IEEE Technical Societies, companies, Universities, attendee fees, partnering professional societies)
* First cut at session topics and possible speakers
* Preliminary agenda (session lengths, breaks, lunch, opening and/or closing sessions)
* Identify Distinguished Lecturers to whom you will solicit participation (IEEE, IEEE Society, if a Student track is planned then S-PAC) and identify which sources will support DL’s travel
* Event description for use in speaker solicitation
* finalize event date
* identify potential corporate and other Supporters ($ donors) and assign solicitation role to team member(s)
* By 4 months in advance:
* Define publicity plan
* Review speaker response and identify alternates for gaps
* solicit funds from previously identified sources
* Establish plan for offering CEUs
* review Supporter response and decide on any continuing efforts (needed for budget in 1 month)
* By 3 months in advance
* commit venue and food arrangement (breaks, meals)
* Execute publicity plan
* Firm budget – set participant fees (professional member, student member and life member, non‑member) try to make non‑member fee approximately equal to member fee plus new member dues
* By 2 months:
* Enter meeting into IEEE vTools and start accepting paid registrations
* publicize to all IEEE members in host Section and adjacent Sections (vTools e-notice)
* review all previous actions
* Communicate with all speakers and thank them for their agreement to participate, offer local transportation and assistance with lodging reservations
* Define appreciation actions for speakers (thank you gift, speaker’s dinner, etc.)
* 1 month before event:
* Reconfirm all contracts and commitments (venue, food, speakers, etc.)
* Establish last month actions with start & finish dates, assigned team member
* schedule weekly review meetings
* define needed contingency plans

**On day of event: -- follow your Technical Meeting plan for “On day of event” actions**

* 4 hours before:
* 2 hours before:
* 1 hour before:
* 30 minutes before:
* When attendees arrive:
* At meeting time:
* After talk:
* After talk:

**Later – after talk:**

* Send a thank you note to speaker, share comments from attendees.
* Report attendance in vTools.

**History:**

2014-03-14: John Montague and Adam Ward