



IEEE Region 3 SoutheastCon Operations Manual

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IEEE Region 3 SoutheastCon Operations Manual

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Revision History

| Revision | Date | Comments/Changes |
|-----------------|----------------|---|
| REV - | April 20, 2020 | Released |
| REV 1 | Aug 03, 2021 | Updated with clarification on dates and budget submission, virtual conferences, updated NextGen financial system, and EDAS; updated with Section 5.15; updated with NextGen Chart of Accounts |
| | Nov 11, 2021 | Updated RegFox and Student Competition info |
| | Nov 21, 2021 | Updated with RSAC and Steering Subcommittee info |
| | Dec 06, 2021 | Updated and released Rev 1 based on comments received |

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1. What is IEEE Region 3 SoutheastCon?

IEEE Region 3 SoutheastCon is an annual conference hosted each spring within Region 3 of the IEEE. Each year the conference is hosted by a different local host entity (Section, Area, or Council). During SoutheastCon three distinct concurrent events are held:

- 1) A Student Conference attended by most of the technical Universities within the Region. The student conference includes several competitions as discussed Section 7 of this manual.
- 2) A Technical Conference attended by people from all over the world. The technical conference includes the presentation of refereed papers by the authors and may also include poster sessions for papers accepted as abstracts.
- 3) Region 3 Annual Meeting attended by Region 3 Committee and other volunteers. This meeting is planned and run by Region 3 leadership.

The conference is co-sponsored by IEEE Region 3 and a local IEEE Organizational Unit (OU) with half of the surplus going to Region 3 and the other half going to the local OU. A Memorandum of Understanding (MOU) is written between the local OU and the Region 3 such that the Region 3 is responsible for all losses for the conference. This means that the financial risk of running the conference is upon the Region. However, this also means that Region 3 has administrative oversight of the conference.

As a cosponsor of the Conference, Region 3 will supply resources necessary to handle the logistics of operating the Conference. This includes, but is not limited to:

- Site Selection
- Registration System and Supplies
- Paper Submission System
- Start-up Seed Funding

Additionally, the [IEEE Center for Leadership Excellence \(CLE\)](#) offers a 'one stop' training solution designed to serve the multiple and diverse range of IEEE user communities. From volunteers, non-volunteers to students, members, and conference organizers, the site offers a simpler and effective learning experience.

2. Advantages of Hosting IEEE Region 3 SoutheastCon

Hosting an IEEE Region 3 SoutheastCon is an opportunity for a Section, Council, or Area, in conjunction with a local student branch (or branches) to generate extra revenue for the local entities and student branches while having the opportunity to network with other IEEE members and the local community. It gives the local entity the opportunity to run a US\$100K+ conference without the fear of financial loss or burden and the student branch the opportunity to manage a student competition.

IEEE Region 3 SoutheastCon benefits IEEE Members in the local section, region, and worldwide. IEEE members world-wide are provided the opportunity to network with peers in IEEE, as well as an opportunity to attend and present at a technical conference. This is particularly beneficial to local members, who can attend a technical conference close to home. The conference also engages the local members by allowing them to volunteer to support various aspects of the conference according to their interests. Students have the opportunity to participate in the student competitions, attend some of the meetings, and to engage with the professionals. Through local announcements and social media posts, the conference increases the visibility of the IEEE within the local community. Lastly, the conference provides value to the IEEE membership by offering reduced rates to members and providing volunteering opportunities.

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3. What are the Goals for IEEE Region 3 SoutheastCon?

There are many goals that IEEE Region 3 SoutheastCon hopes to accomplish.

- Member Continuing Education through the presentation of papers, posters, and tutorials.
- Membership Growth opportunities through the inclusion of non-members in the conference and differential fees.
- Volunteer Education through Region 3 meeting and volunteer education programs.
- Local Section Vitalization through the engagement of volunteers in the planning and execution of the conference.
- Region 3 and Local Organization financial support through distribution of the surplus.
- Student Membership engagement through the student competition and programs.
- Student Membership growth through student networking and competition.
- IEEE Affinity Groups (Young Professionals, Women in Engineering, Life Members, ...) engagement through networking and professional tutorial and workshops
- Industry engagement through contributions and exhibits

4. What are the Requirements for Hosting IEEE Region 3 SoutheastCon?

Prior to starting the hosting process, you must confirm with the Region 3 Conference Committee Chair that the year of interest is available for hosting. Generally, the conference is awarded 3-5 years in advance. Also, it is highly recommended that the material on the IEEE website be reviewed so that the rules and requirements for hosting an IEEE conference are clearly understood. IEEE provides a host of resources to assist IEEE Organizational Units interested in hosting conferences. It is highly recommended that prospective Sections, Councils, or Areas interested in hosting a conference to review information available at <https://www.ieee.org/conferences/organizers/organizers-index.html>. IEEE Meetings, Conferences, & Events (MCE) also provides additional resources and webinars (<https://ieeetv.ieee.org/event-showcase/events>) which provide valuable information to conference organizers.

4.1. Site Selection

On annual basis, the Region 3 Conference Committee will solicit Sections, Councils, or Areas interested in hosting a conference. Based on received interest to host, the Region 3 Conference Committee will perform a site selection survey at least 3 years prior to the start of the Conference. Region 3 Conference Committee will survey at least 3 locations to host the Conference. Research will include local hotels and conference venues capable of hosting the Conference and will ultimately create a proposal to host the conference and will present the proposal to the Region 3 Committee. Having Region 3 Committee handle this process will ensure that selected properties are capable of hosting the Conference.

A local entity may express interest in hosting and provide recommended locations that meet the following requirements; however, the ultimate site survey and selection will be performed by the Region. As of 2017 in order to host a SoutheastCon with at least 800 attendees the hotel should meet the following specifications:

- Conference Days: Thursday – Sunday (Friday – Sunday during Section Congress years)
- Conference Dates: Mid-March to Mid-April (Excluding Easter and Passover Week)
- Total Conference Space: 25,000 ft² (2,325 m²)
- Largest Ballroom Size: 10,000 ft² (930 m²)
- Secondary Ballroom Size: 7,500 ft² (700 m²)
- Peak Breakout Rooms (w/Ballrooms all divided): 20
- **Note:** The hardware competition space needs 7,000 – 10,000 ft² of dedicated space starting Noon Thursday for setup and open exclusively Friday 08:00 to Saturday 16:00.

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- Total Rooms Nights: 675
- Peak Room Night: 325 (Friday and Saturday)
- Total Onsite Attendees: 800 - 1,000
- Average Food & Beverage Spend: \$100,000

In addition, other factors that should be taken into account are:

- Wireless Internet Access throughout function space
- Distance from Airport and method of transfer
- Room cost
- Meal cost
- Location
- Student and professional volunteers
- Accommodations for MOVE truck access adjacent to venue for parking and training. A request for availability of MOVE at your conference should be submitted through [MOVE Request Form](#).

4.2. Conference Dates

SoutheastCon has been a weekend event since 1996 based on member and volunteer input. The conference date is nominally the first or second weekend in April (being careful to miss Passover and Easter). Local K-12 schools spring break should also be avoided, since that will limit the number of parents who attend. Conference date selection should also consider the following:

- Avoid having the conference too close to other conferences in the area that may draw from the same participant pool (check [IEEE Conference Search](#)).
- It is also a good idea to check with the local convention bureau or chamber of commerce to see if there is a large event going on in the area at the same time that would jeopardize travel or hotel space.
- Students prefer dates prior to the start of May when some schools have final exams.
- Dates earlier than mid-March may impose on hardware contest preparation, particularly in schools that use this as a spring semester design project.
- The later the conference, the less chance of getting contributors who are primarily interested in recruiting graduates.
- Some hotels have limited availability even three years out so potential dates should be checked with candidate hotels prior to finalizing the plan. (Hotels often allow a small window where they will allow a tentative reservation to be placed with them -- locking in a date -- without a financial penalty for canceling or moving.)

4.3. Proposal to Host

If a local entity is interested in hosting a SoutheastCon, they should inform the Region 3 Conference Committee. The Region 3 Conference Committee will add the local entity to the list of potential hosts for a future SoutheastCon. The Region 3 Conference Committee will coordinate with the interested hosts and research the potential host venues available to the local entities and generate a proposal to be submitted to the Region 3 Committee. The Region 3 Conference Committee will investigate at least 3 potential host sites for each SoutheastCon.

In addition to local entities notifying the Region 3 Conference Committee of their interest, providing the following information will greatly improve your chance of being selected:

- Identification of your core volunteers (Conference Chair, Program and/or Paper Chair, Treasurer, Student Chair) (Refer to 5.4 for recommended volunteer positions)
- Commitment information and status from the local university(ies)
- Background about the location may not be provided by the Convention and Visitor's Bureau (e.g. Things to Do of Interest to Engineers...)
- A list of potential local contributors and status on efforts to gauge interest in supporting the

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- conference.
- A list of potential off-site programs that would be of interest to the attendees (off-site reception and/or awards).
- A list of venues that might not show up on a normal search (See venue requirements in Section 4.1). This may include options for hosting various competitions. Keep in mind that if multiple venues are used it will be necessary to include information relating to distance and method of travel between the venues.
- Information relating to:
 1. Transportation Costs
 2. Parking Costs
 3. Local Airports

4.4. Branding

The official name of the conference is “IEEE Region 3 SoutheastCon <yyyy>” (where <yyyy> is the year of the conference e.g. “IEEE Region 3 SoutheastCon 2021”). The advertised website for the conference MUST be <http://www.ieeesoutheastcon.org/>. This website will point and redirect to each year’s conference and give returning attendees a consistent location to visit to find the conference from year to year.

All materials generated by the conference that use the IEEE Master Brand, must meet the IEEE Master Brand guidelines as specified at: <http://www.ieee.org/about/toolkit/index.html>. This includes any gift bags, shirts, or other items created for the conference. Although it is tempting to abbreviate the conference name to SECon, that abbreviation belongs to the IEEE International Conference on Sensing, Communication and Networking, and we cannot be used.

5. Post-Selection Processes

5.1. Submit IEEE Corporate Required Documentation

Once you have been selected to host, you must submit the required documentation to IEEE Corporate. Visit http://www.ieee.org/conferences_events/conferences/organizers/setup_approval.html for the current list of required documentation. The Region 3 Conference Committee and MCE are available to mentor and train hosting committee with various aspect of hosting a conference.

5.1.1. Principles of Business Conduct/Conflict of Interest (POBC/COI)

These forms must be filled out by the general chair and conference treasurer. This form can be found at: <http://www.ieee.org/about/corporate/compliance/index.html>.

5.1.2. Memorandum of Understanding (MOU)

IEEE Region 3 is the owner of IEEE Region 3 SoutheastCon. The Region 3 Committee grants the local IEEE OU to operate IEEE SoutheastCon on behalf of Region 3. One of the benefits to the local OU of hosting IEEE Region 3 SoutheastCon is revenue sharing. With 50% financial co-sponsorship by the Region, the OU will receive 50% of any surplus that is generated. Region 3 assumes 100% of the liability should the conference operate at a loss. To protect the Region’s interest in the conference, the Region 3 Director, or an appointee of the Director, shall have ultimate authority over all aspects of the conference and can overrule any decision made by the hosting OU. Opportunity to host IEEE Region 3 SoutheastCon by the hosting OU can be revoked by a vote of the Region 3 Committee.

An MOU will be generated during the conference application process. Upon approval of the host site by the Region 3 Committee, Region 3 will submit the conference application. The MOU that is generated must indicate the conditions listed above. The Region 3 and the hosting OU must approve the conference application prior to starting any contract negotiations with the local venues. The application

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can be submitted via the Conference Organizers Portal

https://www.ieee.org/conferences_events/conferences/organizers/index.html.

5.2. Establish Budget

The IEEE Region 3 SoutheastCon organizing committee establishes a budget for review and approval by the Region 3 Conference Committee 17-months in advance of the scheduled event. Upon review and concurrence, the submitted budget shall be submitted to the Region 3 Finance Committee for endorsement. It is then submitted for approval by the Region 3 ExCom; this should occur at least 15-months in advance of the conference. An approved budget at the Region ExCom level is required for engagement of IEEE MCE prior to contract negotiations for any expenses that will be in excess of \$10,000.00. Region 3 and the hosting OU equally provide seed money into the conference NextGen bank account. The local conference committee is responsible for managing the cash flow as well as the overall budget bottom line. For budget preparation, the conference committee should consider the following:

- Establish a master account with the hotel to be settled after the conference.
- Require registration fees from authors with the submission of the papers
- Establish a fee differential that encourages early registration
- Comply with IEEE guidelines on pricing differentials for Students and Life Members
- Take steps to ensure solid participation in the technical program
- Pursue contributors and exhibitors to gain other income. In each case, carefully consider levels/fees and what benefits are given to companies that participate.
- Aggressively pursue the chosen funding path early enough to get serious consideration. Many companies:
 1. Prefer to break their sponsor contributions up between years, and
 2. Allocate their contributions in their budget process that is timed relative to their fiscal year.

| Activity | Responsible for Funding or Identifying Alternative Funding Source |
|---|---|
| Luncheon Program | Hosting SoutheastCon Conference Committee |
| Awardee's travel | Region 3 Awards Committee (or Awardee's company) |
| Awardee's Banquet Dinner (& spouses) | Negotiated. Region 3 Awards Committee |
| Plaques for Student Paper Contest Winners | Region 3 Student Activity Committee |
| Cash Awards for Technical Paper Contest | Region 3 Student Activity Committee |
| Region 3 Traveling Trophy for Hardware Contest | Region 3 Student Activity Committee |
| Plaques, Certificates or other awards for Student contests | Region 3 Student Activity Committee |
| Student Papers (at least one per author) | Eta Kappa Nu |
| Travel of Next SoutheastCon Conference Chair and Committee members to shadow hosting conference | Next SoutheastCon Conference hosting OU |
| Audit of Conference | Hosting SoutheastCon Conference Committee |
| Meeting Rooms for Region 3 | Hosting SoutheastCon Conference Committee |
| Special AV needs for Region 3 | Hosting SoutheastCon Conference Committee |

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|--|---|
| Region 3 SOSC Dinner | Region 3 |
| Post Conference Debrief Lunch | Hosting SoutheastCon Conference Committee |
| Conference contributors | Hosting SoutheastCon Conference Committee |
| Meals for fully paid authors/Region 3 Committee/Life Members | Hosting SoutheastCon Conference Committee |
| Conference reception and banquet for student registrants | Hosting SoutheastCon Conference Committee |

5.3. Execute Venue Contract

The Region 3 Conference Committee will negotiate and execute the contracts with the Conference venue(s), and will ensure that the property meets all the requirements of the Conference. The Region 3 Conference Committee will make sure the contract contains provisions to cover the resources normally required for the Conference including, but not limited to:

- Power
- Internet
- Rooms
- Food & Beverage
- Function Space
- As the venue contract will have a liability of more than US\$25,000 it will be necessary for the Region 3 Conference Committee to submit the contract to IEEE Corporate for review and approval at conference-contracts@ieee.org.

5.3.1. Contract Lessons Learned

When reviewing the contract, we have found that the following clauses should be included:

- A Rate Protection Clause should be included. A rate protection clause protects the conference from having the venue sell rooms at a lower rate than the negotiated rate. Not all properties will agree to this, but this should be a part of the negotiation with the property.
- A clause should be in the contract in regards to the fees and usage of power and internet. Access to house power in the function spaces should be complimentary (may be dependent on meeting room or Food and Beverage commitments). Power in addition to normal house power should be at an additional charge. Internet should be negotiated at a fixed rate for the conference (avoid per user fees). This fixed rate may be per-day with a usage limit. If there is a usage limit, then negotiate a limit appropriate for the number of attendees to the conference.
- It is preferred that the property allow for outside vendors for A/V without additional charge. However, at certain properties the A/V must be purchased in house.
- Unless the conference venue is significantly larger (2x or more) than the minimum requirements specified in Section 3 above, then your contract should allocate 100% of the space 24 hours a day for the duration of the conference. The contract should state that any unneeded space will be released to the hotel/conference center anywhere between 1 to 3 months (pick a specific time period) prior to the conference.
- A clause should be added to make sure that no event should be scheduled in any space adjoining the Awards Banquet room.
- It is preferred that the property(ies) provide high-speed wireless access at all venue locations at no charge. This is an item that can be negotiated upfront and the organizing committee would need to verify access speeds for a large number of conference attendees.
- If you have hosted a conference and would like to provide additional lessons learned, please contact the Region 3 Conference Committee for inclusion in this document

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5.4. Establishing your Steering Committee

A core organizing committee should be established shortly after Region 3 approval. The organizing committee should be kept rather small to facilitate progress. This organizing committee can be established using any combination of the Region 3 and local volunteers. The organizing committee should include the following members:

- General Chair
- Vice Chair (or Co-Chair)
- Treasurer
- Secretary
- Technical Program Chair
- Student Program Chair
- Exhibits/Contributors Chair
- Publicity/Social Media Chair
- Logistics Chair
- Web Master
- Spouse/Partner Program Chair (optional, but recommended)
- Ex Officio from Region 3 Conference Committee
- Following Year SoutheastCon Chair

Each chair may, but is not required to, establish a committee to implement their plans, and Co-chairs are encouraged to help with each committee's work. The members of a committee may attend the steering committee meetings, but should not be considered voting members of the steering committee. It is strongly recommended that you contact previous year(s) committee members for guidance and experience. Select members of the organizing committee should attend at least prior year's conference to gain knowledge on hosting the conference. At a minimum the members should include General Chair (Co-Chair), Treasurer, Technical Program Chair(s), Logistics Chair, and Student Programs Chair.

5.4.1. General Chair

The General Chair is responsible for the overall execution of the conference. The General Chair provides mentorship to committee members and resolves any conflicts that may arise during the execution of the conference. A General Chair delegates tasks and action items to other members of the committee and makes sure the conference remains on schedule. The General Chair is responsible for reporting conference status to the Region at the monthly Region 3 ExCom meetings. The General Chair establishes the conference budget with the Treasurer. The General Chair establishes the agenda for committee meetings with the Secretary. The General Chair runs the committee meetings and makes sure they stay on agenda.

5.4.2. Vice Chair/Co-Chair

The Vice Chair is usually given the responsibility of managing a major portion of the conference at the discretion of the General Chair. This could be the program, registration, or some other task the Vice Chair is able to manage. The Vice Chair will become the General Chair if the General Chair is not able to perform their duty.

5.4.3. Treasurer

The Treasurer maintains the finances of the conference. The Treasurer is responsible for establishing and maintaining the budget. The treasurer will pay all bills of the conference and ensure submittal of all appropriate documents to IEEE according to IEEE deadlines. The Treasurer shall not also serve as the General Chair or Vice Chair/Co-Chair.

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5.4.4. Secretary

The Secretary takes the minutes of the committee meetings. The Secretary maintains the action item list for the committee. The Secretary announces the committee meetings and publishes the agenda as established by the General Chair for the meeting. The Secretary is responsible for making sure all committee documents are archived on the Region 3 SoutheastCon Google Drive.

5.4.5. Technical Program

The technical program committee is responsible for all aspects of the technical program. This committee will issue the call for papers, accept paper submissions, review paper submissions, select the papers for presentation at the conference, and develop the proceedings of the conference. Additionally, this committee will participate in the Region 3 Conference Committee's Technical Programs Steering Committee for coordination on processes and procedures for evaluation and review of the technical papers.

5.4.6. Student Program

The student program committee is responsible for all aspects of the student program. This committee will act as a liaison with the host student branch(es). This committee is responsible for making sure all the student competitions are properly managed. This committee must work closely with the Regional Student Representative (RSR) and the Regional Student Activities Chair (RSAC).

5.4.7. Exhibits/Contributors

The exhibits/contributors committee is responsible for targeting, identifying, and contacting potential local contributors and exhibitors. This committee should work with the Region 3 Conference Committee to get a copy of the exhibitor/contributor prospectus as well as help in identifying regional and national exhibitors/contributors for the conference. This will include the development of an advertising strategy and marketing plan, see Section 6.9. This committee will work with the Publicity Committee to acknowledge contributors and sell advertisements in the program. The committee will also coordinate space requirements with the logistics committee.

5.4.8. Publicity/Social Media

The publicity/social media committee is responsible for working with the Region 3 Conference Committee to publicize the conference. This committee will be responsible for placing advertisements in appropriate media (print, web, etc.) as specified in the Sales and Marketing Plan. This committee is also responsible for producing conference publications other than the proceedings, including the conference program.

5.4.9. Web Master

The web master will be responsible for developing and maintaining the conferences website in accordance with IEEE guidelines and will post up to date information, as provided by other members of the hosting committee with respect to conferences activities for the authors, students, and Region 3 participants, contributors, exhibitors, and other attendees.

5.4.10. Logistics

The logistic committee is responsible for supporting the conference chair with all aspects of the conference logistics. These activities will include facility planning, meal planning, A/V planning, and volunteer coordination, as a minimum.

5.4.11. Spouse/Partner Program Committee

The spouse/partner program committee is responsible for developing programs and supplying information for the spouse/partner and children of the attendees. This committee will identify local attractions and events of interest to the attendees and their partners. This committee may be chaired by

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a spouse/partner of a member.

Table 1 Functional Committee Responsibilities

| COMMITTEE | RESPONSIBILITIES |
|------------------------------------|---|
| Technical Program | <ul style="list-style-type: none"> ▶ Pre-announcements ▶ Calls for Papers ▶ Obtain mailing lists for calls ▶ Mail the calls ▶ Recruit session chairs ▶ Receive, acknowledge, and categorize paper abstracts & manuscripts ▶ Recruit paper reviewers ▶ Review submitted abstracts/posters/papers ▶ Compile list of accepted papers ▶ Correspond with authors on status of submitted abstracts/posters/papers ▶ Organize technical sessions and presentation tracks ▶ Define and maintain statistics on papers ▶ Establish virtual technical sessions ▶ Manage technical issues such as respond to questions and issues raised by authors ▶ Review final print ready submissions for compliance to IEEE publication requirements ▶ Submit finalized papers to IEEE Xplore for publication |
| Publications / Social Media | <ul style="list-style-type: none"> ▶ Review ALL publications prior to release ▶ Obtain bids for printing conference programs, proceedings, and awards ▶ Establish & update conference website ▶ Publish student competition rules and establish a single “source of truth” for all communication on competition rules with the students ▶ Establish conference social media presence ▶ Publish conference schedule, technical tracks, and banquet program. ▶ Coordinate printing of programs & proceedings ▶ Develop SoutheastCon letterhead |
| Finance | <ul style="list-style-type: none"> ▶ Create budget based on inputs from local conference committee ▶ Manage all financial transactions ▶ Establish banking accounts ▶ Handle conference insurance ▶ Manage cash flow ▶ Continuously update budget report to IEEE ▶ Handle & process credit card payments ▶ Perform all banking duties, including - handling of all receipts and payment of all bills ▶ Prepare and submit Final Budget Report ▶ Conduct financial account closeout ▶ Distribute conference surplus |
| Secretariat | <ul style="list-style-type: none"> ▶ Create and send meeting notice ▶ Take minutes of all meetings; distribute minutes afterwards for approval ▶ Manage all Correspondence |
| Logistics | <ul style="list-style-type: none"> ▶ Approve final registration form ▶ Create signs/tickets, design of conference logo, design of badges |

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| | <ul style="list-style-type: none"> ▶ Manage layout of conference settings and room usage ▶ Assist with recruitment and scheduling of volunteers ▶ Print forms, badges, signs, tickets ▶ Work with conference Chair and hosting facilities for all meal function planning and organization ▶ Recruit or hire personnel for registration ▶ Oversee registration and preregistration procedure |
|--|---|

5.4.12. Hosting Committee Timeline of Activities

In support of organizing a successful conference, each member of the organizing committee also has to meet a specific timeline of activities. The following Tables provide a recommended timeline of activities for various positions.

Table 1. General Chair Duties and Timeline

| Task | Timeframe |
|--|------------------|
| Establish Conference Organizing Committee; contact R3 Conference Committee chair and previous year's Committee for best practices | Start |
| Contact MCE (ieee-mce@ieee.org) for conference mentor, education, guidance, policies, services, and tools | Start |
| Reach out, apply, and obtain sponsorship information from all IEEE and/or non-IEEE OUs. Learn their requirements. | Start |
| Create and finalize scope, topics, and theme. | Start |
| Engage with local IEEE Section leadership where your conference will be held. How can you partner? | Start |
| Select conference date, location, and venue. Avoid holidays, other conferences, and peak season. | Start |
| Create conference branding and basic website. Share URL with MCE (ieee-mce@ieee.org). Host your web site for free with IEEE. | Start |
| Ensure that all vendors and volunteers are fulfilling duties. Conduct periodic quality check in. | Monthly |
| After agreeing with sponsors, submit Conference Application to apply for IEEE sponsorship support and inclusion in IEEE Conference Search. Approve MOU. | 36-24 months out |
| Complete POBC/COI Form within 30 days of assuming Chair position | 36-12 months out |
| Apply for grants for conference support | 18-15 months out |
| Notify MCE of on-site event emergencies (eert@ieee.org) and event conduct concerns (eventconduct@ieee.org) | On-site |
| Hold post-conference wrap-up meeting. Include next year's committee and R3 leadership. | On-site |
| Report statistics and lessons learned to R3 Conference Committee, next year's committee and MCE (ieee-mce@ieee.org). | 1 month post |

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Table 2, Treasurer/Finance Chair Duties and Timeline

| Task | Timeframe |
|--|-----------------------|
| Seek input and approval on registration fees and other key aspects of the conference budget | Start |
| Draft conference budget | Start |
| Complete POBC/COI Form within 30 days of assuming Treasurer position | Start |
| Submit budget to IEEE MCE for review and approval | 36-12 months out |
| After budget approval, learn audit requirements for documentation throughout the life of the conference. Conferences that do not require an audit by Policy are open to random testing by IEEE Internal Audit. | 36-12 months out |
| After budget approval, establish means for filing indirect taxes if applicable, prior to collecting any revenue or making payments | 36-12 months out |
| After budget approval, establish Bank Account and submit required documentation to assigned analyst | 36-12 months out |
| Request loan from R3 and Section to your conference account after establishing | 36-12 months out |
| Submit pre-conference forecast to Conference-Finance@ieee.org (including updates to projected attendance based on paper submission numbers, confirmed financial contributions, expenses, etc.). Multiple forecasts are helpful. | Monthly |
| Monitor additional revenue and expenses on-site, request daily bills from vendors to review for accuracy, review on-site transactions with forecast numbers daily. Inform registrar of any additional on-site revenue. | On-site |
| Collect tax forms from individuals receiving awards or any non-reimbursable payments | On-site |
| Issue reimbursements for conference travel expenses | On-site-1 month post |
| Review 1099 1042 and make sure it is submitted to your Business Analyst by year end | 1 month post-year end |
| Ensure that support transfers from IEEE sponsors are submitted to your Business Analyst by year end | 1 month post-year end |
| Submit post-conference forecast to conference-finance@ieee.org . | 1 month post |
| Follow-up for any outstanding bills/final invoices | 1 month post |
| Close bank account, distribute surplus and loans to financial sponsors (no later than 6 months) | 1-6 months post |
| Submit final financial report with Certificate of Accuracy (no later than 12 months after conference) | 1-12 months post |
| Prepare and submit all audit material to IEEE auditor or independent auditor (as necessary) | 1-12 months post |

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Table 3, Technical Program Chair Duties and Timeline

| Task | Timeframe |
|---|------------------|
| Develop technical program (include underrepresented groups such as young professionals, women, students) | 18-15 months out |
| Establish paper submission process/deadlines. Include Crosscheck or plagiarism detection tool . | 18-15 months out |
| Set up online paper management system | 18-15 months out |
| Draft a Call for Papers (CFP) | 18-15 months out |
| Establish review committee. Complete paper review process. Notify authors. | 6-4 months out |
| Finalize technical program. Sign off on final copy or delegate to ensure quality control. | 6-4 months out |
| Create and publish advanced program. | 6-4 months out |

Table 4, Publications Chair Duties and Timeline

| Task | Timeframe |
|--|---------------------|
| Submit IEEE Conference Publication Form to request approval to submit papers to IEEE Xplore® | 18-12 months out |
| Register for PDF eXpress or PDF eXpress Plus (optional) | 15-12 months out |
| Establish Production Services for conference content | 15-12 months out |
| Register for eCF for accepted papers 90 days prior to Notification of Acceptance. | 4 months out-launch |
| Submit Conference Proceedings/Content per LoA 30 days post conference start date. | 0.5-1 month post |

Table 5, Public Relations/Publicity Chair Duties and Timeline

| Task | Timeframe |
|---|----------------------|
| Develop communications/audience development plan. Incorporate milestones - call for papers promotion, early bird deadlines, and speaker/program announcements. | 16 months out |
| Begin outreach to educational institutions, corporations, government, and industry for support and patronage. Ask companies to do press releases for keynotes as they accept. | 15 months out |
| Promote Call for Papers (CFP) and Exhibit Prospectus at current year's conference, if applicable | 15-12 months out |
| Update website (Call for Papers, Exhibit Prospectus, venue/hotel, key dates, author instructions, and program) | 12 months out-launch |
| Promote conference through your sponsoring The Region 3, IEEE-USA and local IEEE section. | 12 months out-launch |
| Share Event Conduct and Safety Statement with attendees | On-site |
| Promote next year's conference with collateral, including Save the Date, Call for Papers, and Exhibit Prospectus | On-site |
| Send post-event thank you email and attendee survey | 1 day - 1 week post |
| Post photos, video content, multimedia and notices of appreciation on the website | 1 day-1 month post |
| Post next year's date and location on the website | 1 day-1 month post |

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Table 6, Local Arrangements Chair Duties and Timeline

| Task | Timeframe |
|---|---------------------|
| Confirm venue and vendor contracts. Send contracts valuing over US \$1,000 to contracts team (conference-contracts@ieee.org) for review. | 36-24 months out |
| Review & reconfirm hotel meeting space & room block. Monitor attrition cut off dates. | 12-9 months out |
| Plan social activities and tour program, if applicable. and add to registration site | 9-6 months out |
| Work with vendors/venue to finalize room layout, AV, food & beverage, & signage. Finalize volunteer assignments. | 4 months out-launch |
| Create Event Emergency Plan & share with conference committee, volunteers, & vendors on-site | 4 months out-launch |
| Order on-site items: registration materials, final program, proceedings, signage, giveaways, and items to promote next year's conference. Ship to site. | 4 months out-launch |
| Arrive at conference location at least one day prior to conference start. Confirm on-site logistics with venue. | On-site |
| Monitor on-site activities & hold meetings with key organizers, vendors, and venue as needed. | On-site |

Table 7, Registration Chair Duties and Timeline

| Task | Timeframe |
|---|---------------------|
| Determine registration process/vendor. Include IEEE Event Terms and Conditions & IEEE Privacy Policy. | 12-9 months out |
| Work with Finance Chair to develop registration pricing scenarios (early bird, etc.) | 12-9 months out |
| Create GDPR-compliant registration form (& visa process if applicable). Ensure registration service is Payment Card Industry (PCI) compliant. | 9-6 months out |
| Work with vendor on badging. Contact MCE (ieee-mce@ieee.org) to learn about discounts. | 4 months out-launch |
| Manage on-site registration | On-site |
| Finalize attendee list - attendee name, item purchased, amount paid, payment method, date paid & no shows. Send to IEEE MCE with closing materials. | 1 month post |

Table 8. Sponsorship/Exhibits Chair Duties and Timeline

| Task | Timeframe |
|--|---------------------|
| Work with Finance Chair to establish corporate contribution targets & development of tiers | 18-15 months out |
| Prepare Exhibit Prospectus. Send request for proposal (RFP) to exhibit decorators. | 18-15 months out |
| Establish a means of exhibitor & contributor invoicing & payment tracking | 18-15 months out |
| Create sponsor & exhibit report w/entity name, item purchased, amount paid, method of payment, & date paid | 12-1 months out |
| Finalize exhibitors, space assignments & exhibitor bios. | 4 months out-launch |
| Collect & record payments and provide on-site information | Monthly |
| Set up for event: registration area, exhibit space, information booth, office area, signage, etc. | On-site |
| Establish location, schedule, & staffing sign-up for next year's conference. Renew exhibitors on-site. | On-site |

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Table 9. Hardware Competition Chair Duties and Timeline

| Task | Timeframe |
|--|------------------|
| Begin writing rules for hardware competition. | 21 months out |
| Work with Local Arrangements chair to assure adequate rooms in the venue for holding the competition | 18 months out |
| Complete hardware competition rules and submit them to Conference Committee for approval. | 15 months out |
| Publish preliminary rules on the conference website | 15 months out |
| Set up Discord channel to discuss the rules and get all interested teams signed up on it The Hardware Discord should be on the same channel as the rest of the student competitions | 15 months out |
| (At previous SoutheastCon) Release Official Rules | 12 months out |
| Handle all questions/disputes about the rules which may arise on the Discord channel. | 12 – 1 month out |
| Build all game boards to be used at the venue | 6 – 1 month out |
| Work with Local Arrangements chair to assure enough volunteers will be available to run the competition. | 6 months out |
| Work with Local Arrangements chair to assure overnight access and security are available at the venue for the participants. | 6 months out |

5.5. Hosting a Virtual Technical Meeting

As we learned in 2020 and 2021, a global pandemic or other events may force you to host a virtual conference. Fortunately, we have access to WebEx Events through MGA’s enterprise subscription, so there is no cost for using WebEx for our conference. The current Region 3 Conference Committee Chair and SoutheastCon Chair should have WebEx accounts set up so they can create the event.

Virtual technical meetings can be hosted using IEEE supported conferencing tools such as WebEx Events which allow conduct of webinars with up to 3000 attendees and streaming capability for up to 40,000 attendees. The virtual conference should be created with separate WebEx events for the technical program, student competitions, and Region 3 meetings. An event is the equivalent of a room-day in a conference. Each WebEx account holder can create up to four (4) events in parallel for each account, and you recreate events if needed for multiple days. Events can be associated with a common Program, and that is your conference. Note that an attendee can register for an event or for a Program. When registering for a program, the attendee can choose which events they want to include. Program attendees are given the choice of all events – there are no ‘tiers’. There are three different roles for WebEx Events; 1. The Host who controls the event; 2. A panelist who can speak if promoted to presenter by the Host; 3. Attendees who cannot speak or present. Attendees can ask questions by typing in a Q&A box. More detail is provided in the following Sections.

5.5.1. Hosting

The host is the only person who can mute someone, change the role of someone (including expelling them), and perform roles like starting and stopping recording. This is a single point of failure for the event so a backup host is required for every Event. For a technical program, the track chair and a second person are typically the hosts. The ‘second person’ should be there all day for continuity and needs to have a reliable internet connection. There is a “host code” for each Event that allows someone to take over the host role – this should be provided to the hosts and backup hosts for each room. The de facto host for all elements of the conference is the account holder for the WebEx that creates the conference. All hosts and

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backup hosts should be trained in running a WebEx event prior to the Conference.

5.5.2. Panelists and Presenters

Panelists can be invited to their individual events, or, a panelist can be promoted from the attendees. Panelists are given access to speaking and being on video. The host can change a panelist's role to presenter (one at a time) Panelists can speak, but only the presenter can share their screen. Panelists and presenters should have a training session before the conference. Each presenter needs 1-5 minutes to be stepped through the process.

5.5.3. Attendees

Attendees can register for one, several, or all of the sessions. Attendees are given a simple screen with the presentation, speakers' videos (if applicable), and Q&A and Chat boxes. Information slides should be displayed before and between sessions with instructions on how to type questions in the Q&A box and report technical issues (e.g., 'I can't hear', etc.) into the chat box to the host. The host or backup typically reads the questions to the presenter during the Q&A session

Steps for Setting up the WebEx Program:

- Determine the Conference format (how many parallel sessions, how many days)
- Recruit your hosts and backup hosts
- Set up the conference in WebEx Events
- Training for hosts and backup hosts
- Set up training/rehearsal for all speakers
- Load up panelists in the events
- Send out attendee links to the attendees
- Hold conference!

IEEE MCE has expertise in online, virtual, and digital event mediums and can also assist with hosting such events. Additional information can be found at [IEEE Virtual Events](#).

5.6. Establish NextGen Banking Account (NGBA)

The conference MUST use an IEEE NextGen banking account. The Region 3 Treasurer will establish the CBA for the Conference. The following people must be on the signature card for the NextGen banking account:

- General Chair
- Conference Treasurer
- Region 3 Treasurer

All funds related to the conference must be deposited into and distributed from the CBA. It is not allowed for any expenses to be paid directly by conference volunteers unless they submit a request for reimbursement from the conference from the CBA.

Under no circumstances should funds received by the conference be deposited into a personal account or an account of a different IEEE organizational unit. As part of account setup, General Chair and Treasurer will also get a credit card associated with the account. The limit of transaction for this credit card is set to \$5000. For any charges beyond the set limit, General Char and/or Treasurer shall obtain approval from IEEE finance.

5.7. Reporting to the Region 3

The conference must report status to the Region 3 at the normally scheduled Region 3 ExCom and Committee meetings. These reports should include the following information:

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- General Status Overview
- Paper Submission Status (deadlines, Submitted/Reviewed/Accepted)
- Registration Status (opening date, number of registrants by category)
- Room Pick-up status (number of room-nights sold)
- Financial Report (budget status update)
- Roadblocks

6. Planning Your Conference

6.1. Budget

A well thought-out and maintained budget is important to the success of the conference. The conference treasurer is responsible for maintaining the budget and monitoring the expenses against the budget. NextGen is the new financial system that should be used to track conference finances. IEEE MCE has a short instructional [video](#) for conference treasurers.

It is required that the preliminary budget show a 20% surplus on the conference. Even though IEEE is a not-for-profit corporation, the surplus generated from the conference helps the Section and Region 3 support the other programs and volunteer activities that they run.

There are some rules that should be kept in mind when establishing a budget:

- The rate for non-members should be at least 15% more than members (and must be more than the cost of membership)
- The rate for students should be kept to a reasonable minimum. This amount should be subsidized by contributions and exhibits.
- The rate for life members must be no more than the rate that students pay. However, for meal planning, life members will be eligible for all the conference provided meals.

When establishing the budget, it is important to remember that the prices charged by hotels for food, beverages, and services are higher than typical prices you might pay at a local restaurant. Get a price list from the hotel as early as possible and generate an estimated food, beverage, and services cost to help determine the rates to charge attendees for your conference. Make sure tax, service charges, and gratuity are included in your estimate (sometime referred to as cost++). It is important to closely review the contract for any item that could have a budgetary impact. The attendee fees should cover at a minimum the cost of these items. A spreadsheet is available from Region 3 to help determine this information.

NOTE: It is absolutely critical to keep up with the conference budget and make sure that regular budget updates are provided to IEEE. If for any unforeseen reason the conference is cancelled or impacted, the amount of liability covered by IEEE conference insurance will be based on the last approved and submitted budget. Please see Section 6.8.

6.2. Program Plan

On the IEEE Conference required documentation page there is a checklist and timeline for planning and running a conference. http://www.ieee.org/conferences_events/conferences/organizers/required_documentation.html. The presentation can be used to establish a program plan for the conference. The program plan does not need to be any specific format. Past conferences have used excel spreadsheets and action item lists. Use whatever format your committee prefers.

6.3. Call for Papers

The call for papers should be completed and ready in time to be placed in the prior year's conference

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program.

6.4. Paper Submission and Review

The Region 3 Conference Committee will select and contract for the Paper Submission and Review system. Starting in 2021, the system used for paper submission is supplied by EDAS (<https://edas.info/doc/>). The Region 3 Conference Committee will periodically review the list of available paper submission systems. The following requirements must be met:

- Integrated with Conference Registration System
- Able to handle at least 1,000 papers
- Able to handle blind and non-blind reviews

6.5. Online Registration

The Region 3 Conference Committee will select and contract for the Online Registration system. Starting with SoutheastCon 2022, RegFox (<https://www.regfox.com/>) will be used for registrations. The Region 3 Conference Committee will periodically review the list of available registration systems. The following requirements must be met:

- Early and late Group Registration Capability
- Early and late Student registration with different registration fees
- Early and late Volunteer registration
- Author registration
- Contributor/Exhibitor Registration
- Onsite Badging
- Onsite Check-in
- PCI Compliant
- Integrate with a CBA capable payment system
- Allows for submission of resumes when registering

6.6. Risk Assessment and Management Plan

A Risk Assessment and Management Plan should be performed for the conference. The discussion on how to execute a Risk Assessment and Management Plan is outside the scope of this document. Several papers and seminars are available online. If a conference needs help on establishing a Risk Plan, please contact the Region 3 Conference Committee. A sample Risk Analysis spreadsheet can be found in the Templates directory of the SoutheastCon Google [Drive](#).

6.7. Emergency Management Plan

Although we hope that emergencies will not happen at SoutheastCon, the conference organizers and volunteers should be prepared to handle such an event if it should occur. Past SoutheastCons have experienced tornadoes, fires, and various medical emergencies. It is imperative that you discuss your emergency management plan with the property and tailor your plan to the venue. Most venues have on-site first responders that can respond to an emergency quickly.

The Emergency Management Plan should be communicated to all SoutheastCon volunteers. The types of emergencies that should be covered include, but are not limited to:

- Weather Emergencies (Tornado, Hurricane, Flooding)
- Fire
- Medical Emergencies (Minor & Major)
- Active Shooter
- Bomb/Terrorist Threat

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When an emergency situation occurs, you may have only moments to respond, and the actions taken can have a significant impact on the event. Having a solid plan in place is the first step.

A well thought out and detailed plan is an essential part of emergency preparation. [IEEE's Event Emergency Response Team \(EERT\)](#), is pleased to provide a template for your use and a framework for developing an emergency response plan for your event. [Download the template](#) and get your action planning started!

6.8. Conference Insurance

Hosting a conference can be rewarding, but if for some reason the conference has to get cancelled, it could also be a huge liability to the Region 3. As a result, any approved IEEE conference is covered by the following insurances:

6.8.1. Liability Insurance

IEEE maintains Commercial General Liability (CGL) insurance to protect IEEE in the event a claim is made against IEEE and/or its Volunteers. The CGL insurance provides coverage for third-party bodily injury and property damage.

IEEE Volunteers are included on IEEE's insurance policies and protected while acting within the scope of their duly authorized duties as Conference Officers or Committee Members for the duration of the conference and its activities.

To the extent permitted by law, IEEE shall indemnify each person who serves as a duly authorized Volunteer of a duly authorized IEEE activity pursuant to [IEEE Bylaw I-300.3 Indemnification](#).

The Conference must maintain a record of all Officers and Committee Members who are actively engaged in the management of the conference. This record ensures that coverage is afforded to the appropriate Volunteers acting on behalf of the conference.

In addition to the primary CGL insurance coverage, IEEE maintains Umbrella Liability coverage that provides additional limits of liability coverage.

Conferences utilizing a transportation service provider (e.g. Boat cruise, Bus tour, other) should obtain evidence of insurance coverage from the service provider. IEEE should be named as an additional insured. IEEE's liability insurance coverage does not apply to charters. For additional information, please contact ORIMS@ieee.org.

6.8.2. Property on Exhibition Insurance

Contact ORIMS@ieee.org if you require insurance for any IEEE-owned, leased, rented, or borrowed equipment. Please include the following equipment information with your request:

- Description
- Owner
- Replacement value (US\$)
- Copy of rental/lease agreement with insurance requirements (if applicable)
- How will the equipment be safeguarded while on exhibition at the conference?
- Dates coverage required

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6.8.3. Business Crime Insurance (also referred to as fidelity bonding)

IEEE maintains business crime insurance that protects IEEE in the event of loss due to fraudulent acts (e.g., theft of conference funds) committed by staff or volunteers.

The IEEE business crime insurance does not provide coverage for theft of IEEE funds by third-party registration service providers.

6.8.4. Event Cancellation Insurance

Effective October 2013, all approved IEEE conferences that are 100% financially sponsored by IEEE are automatically covered by an event cancellation insurance policy. In order for a conference to qualify for coverage under the IEEE Event Cancellation Insurance Policy, the following conditions MUST be met:

1. The conference must be 100% financially sponsored by one or more IEEE Society and/or organizational unit,
2. The conference must be approved by IEEE and included in the IEEE Conference Database, and
3. A detailed conference budget MUST be submitted and included in the IEEE Conference Database.

The Event Cancellation Insurance protects the conferences from lost revenue and/or additional expenses incurred as a result of an unforeseen cancellation, postponement, or curtailment of an event. Examples of such disruptions might include natural disasters (hurricanes, tornadoes, blizzards, etc.), fire or flood damage to a venue, airline or hotel staff strikes, and other unforeseen causes of event cancellation.

Event Emergency Response Team (EERT) is IEEE's centralized event emergency preparedness hub, offering strategies, best practices, and resources for all IEEE global events. EERT can assist organizers in minimizing the impact of emergencies on event performance, safety and well-being attendees, and organizational reputation. More information on EERT can be found at <https://www.ieee.org/conferences/organizers/emergency.html>.

All other conferences (not wholly owned by IEEE) continue to have the option to purchase individual Event Cancellation Insurance policies. To take advantage of the program IEEE has negotiated, please submit a completed [Event Cancellation Insurance application](#) and a copy of the conference budget to ORIMS@ieee.org.

6.8.5. Conference venue Certificates of Insurance

Certificates of insurance that are required by the conference venue are available upon request. They must be prepared by IEEE's insurance broker and should be requested 30-60 days in advance of the conference. Please allow 5-7 business days for processing.

To obtain a current certificate of insurance, submit a [completed certificate request form](#) to ORIMS@ieee.org. Please include a copy of the venue's insurance requirements and a copy of the executed agreement between the IEEE and the venue.

6.9. Sales & Marketing Plan

A Sales & Marketing Plan should be established in coordination with Region 3 Conference Committee as soon as possible after the conference is awarded. The success of every conference depends on the level of attendance, which is directly related to the marketing activities involved. There are a wide variety of marketing channels to consider for getting the word out about your conference. Always think about your target market and how to communicate as a basis for determining the right mix of communication channels. Adding basic marketing techniques to a traditional approach to organizing an event can have big impact both in building your community and in positive financial results. Creation of blended

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marketing and communications plan comprised of website development, social media, and direct and indirect outreach and advertising to your local, regional, and international network of support can promote development and engagement of your target audience.

With any conference, development of a consistent theme that promotes your goals of the conference is key. In most cases, the theme can be based on strength of the hosting OU's technological/industrial/economic business drivers that are the forcing function of economic development where the conference will be hosted. The theme will be a key driver for developing your conferences brand and promoting it through media.

Having a plan with clear goals and reporting on outcomes will help track success in reaching audiences to increase registration, participation & brand awareness. You can utilize some of the resources available through IEEE MCE to customize an Audience Development Plan to fit the goals of your conference using a blend of marketing and communications strategies including but not limited to:

- Email Marketing
- Social Media
- Online Targeted Advertising
- Custom landing pages for speakers, attendees, and exhibitors
- Research & outreach
- Lead generation
- Connection & leverage to IEEE resources

Your Sales and Marketing plan should not only include ways to increase author and member participation, but also establish a means by which you can attract corporate contributors. Your local Convention and Visitors Bureau and Chamber of Commerce should be a good resource for assisting you to promote your conference to chamber members.

7. The Student Program

The student program is one of the key components of SoutheastCon as it brings together universities within Region 3 to compete against each other. These competitions are developed and managed by both the local hosting OU and Region 3 Student Activities Committee (RSAC). The hosting OU/Student branch is responsible for:

- Robotics hardware competition
- Software competition
- Hackathon (optional)
- Any other locally developed competition

The robotics hardware competition will need to publish its hardware competition rules during the last day of the previous year's conference. Hardware competition rules will need to be provided to the Region 3 Conference Committee for review and comments/feedback 30-days prior to release of the rules.

RSAC will be responsible for developing and organizing the following in person competitions at a minimum:

- Outreach
- Ethics
- Technical Presentation

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- Networking
- Student Branch Promotional Competition

The RSAC will also be responsible for RSAC developed virtual competitions. Competitions in the virtual category have no requirements for students to attend SoutheastCon in person. Virtual competitions are designed with the intent to test out a new competition idea without having to require logistics or overhead from the conference. Therefore, the conference committee will not be impacted by the occurrence of any virtual competition outside of having to allow time in the awards banquet for the virtual winners to be announced.

The hosting conference student program committee will work with the RSAC and the logistic committee in organization and conduct of these competitions. The hosting OU/Student Branch will be responsible for identifying and providing the judges and volunteers for all of the competitions. The RSAC will be responsible for the monetary awards or plaques for all of the student competitions. If the hosting committee is planning for awards for optional competition, the hosting committee needs to coordinate the award with the RSAC.

8. The Technical Program

The technical program is another key component of the SoutheastCon, and in actuality the primary component for any surplus that the conference will realize. Much like the hardware robotics competition, the technical program activities start with the release of the conference Call for Papers during the previous year's conference. The technical program committee is responsible for developing the call for papers, assembling technical paper reviewers, and developing tutorials. The technical program committee will work directly with the Region 3 Conference Committee Technical Program Steering Subcommittee for review of submitted technical papers. This subcommittee includes participation by prior year SoutheastCon Technical Program Chair(s), current year Technical Program Chair(s), and follow-on year Technical Program Chair(s) as a minimum.

9. The Young Professional (YP) Program

The YP track of the SoutheastCon is known as Trailblazers 20XX, bringing together YPs within Region 3. The YP track will be organized by the R3 YP committee with the support of the conference host. The hosting OU is responsible for:

- Providing event space for the YP track
- Coordinating general conference event flow with the YP track
- Coordinating cost of the YP track to ensure expenditures are reflected in the overall conference budget
- Coordinating potential special attendance pricing for YP attendees
- Incorporating Social and Networking event planning during the evening. At a minimum, the event should be open to YPs and the R3 Committee.

The conference committee will work with the RSAC and logistics committee in organization and conduct of this event. In order to ensure coordination a YP will be appointed from the R3 YP committee to sit on the Region 3 Conferences Committee (for strategic planning).

10. The Region 3 Program

The Region 3 Program is typically held on Friday, Saturday, and Sunday morning. The Region 3 volunteers

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participate, and approximately 85 people attend. Region 3 pays for the members of the Executive Committee and each Section Chair (or a representative) to attend. Some Sections send multiple volunteers to the meeting, but their cost is covered by their Section.

The Region 3 program is set by the Region 3 Director, with support from the Executive Committee members. The program typically includes Leadership training, IEEE-USA President-Elect Candidates' Presentations, Area meetings, MOVE truck tours and training, Red Cross training, and an Awards Banquet on Saturday night. Typically, a YP networking event is organized by the YP Coordinator, and a WIE networking or lunch is organized by the WIE Coordinator.

Area chair meetings are typically held on Friday night, and a separate room is needed for each chair meeting.

Depending on the program, Region 3 may need multiple rooms for concurrent sessions on Friday and/or Saturday. Work closely with the Region 3 Director to understand their space and A/V needs, and to keep them informed of the availability of space at the venue. On Friday night, the Region 3 SOSC hosts a diner at an eating establishment at the conference venue or at an establishment selected by the Region 3 Director, which is followed by a SOSC meeting. A Region 3 Committee business meeting is held on Sunday morning, ending at noon. This meeting takes place in one room, large enough to hold all region attendees.

Saturday morning often starts with an Eta Kappa Nu (HKN) Induction ceremony. A sample conference schedule is available on the SoutheastCon Google [Drive](#).

11. Running the Conference

11.1. Semantics

When dealing with a hotel venue, it is important to understand the terminology and semantics used.

- Banquet Event Order (BEO) – This is a document that gives the direction to the hotel and A/V vendors describing when and how the function space should be laid out.
- Turn – This is a term used to indicate that a function space layout must change between events. Depending on the size of the change to the function space, the turn will require a certain amount of time. When a room must be turned, it is important to work with the hotel to determine the amount of time to complete the turn and schedule accordingly.
- Conference Services Manager (CSM) – This is the person at the hotel that will actually be responsible for executing your conference for the hotel. This will be primary point of contact at the hotel during the conference. The venue may also assign a dedicated Banquet Manager that will be responsible for meal functions.

11.2. Food & Beverage (F&B)

The conference normally provides meals at the conference. The conference normally provides full-paid attendees all meals. The following meals are normally provided:

- Thursday Breakfast (if needed for tutorials)
- AM Break (if needed for tutorials)
- Thursday Lunch (if needed for tutorials and volunteers)
- PM Break (if needed for tutorials)
- Friday Breakfast (full-paid attendees & volunteers)
- AM Break (all attendees)
- Friday Lunch (full-paid attendees & volunteers)
- PM Break (all attendees)
- Friday Reception (all attendees)

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- Saturday Breakfast (full-paid attendees & volunteers)
- AM Break (all attendees)
- Saturday Lunch (full-paid attendees & volunteers)
- PM Break (all attendees)
- Saturday Banquet (all attendees, purchased tickets for guests)
- Sunday Breakfast (full-paid attendees & volunteers)
- AM Break (all attendees)
- Sunday Lunch (Conference Debrief for the Region 3 officers, hosting OU committee members, and next year's hosting OU participating committee members)

It is recommended to host hot breakfast buffets. Depending on type of property under contract, breakfast may already be included. For lunch, it is typical to have either a deli buffet, box lunch, or soup/sandwich buffet. The Friday Reception is a heavy hors d'oeuvres buffet. The Saturday Banquet is a plated meal. Be mindful of special dietary needs and work with the facilities to accommodate special needs. It is recommended that the hosting conference committee coordinate the meal guarantees for each meal function with the Region 3 Conference Committee for guidance based on prior knowledge and experience.

As students and life members are heavily subsidized, the conference cannot afford to give them all meals. Unless the conference receives contributions to offset the added costs for these members, it is recommended that you work out a cash lunch option for the students. In the past, the conference has provided a hot line with burgers, hot dogs, and other items at a reasonable cost at the hosting venue's concession stand.

11.3. Banquet

The conference banquet occurs on Saturday evening at SoutheastCon and is a formal sit-down dinner. As part of the banquet, Region 3 Awards are made to awardees selected by the Region 3 Awards Committee. The hosting committee needs to coordinate the banquet schedule with Region 3's Awards Committee Chair for the agenda and publication of the banquet agenda. Additionally, during the banquet, the RSAC will present its awards for all the student competitions held at the conference. The IEEE-HKN Best Technical Conference Student Paper Award will also be included as part of the Banquet. The final round of the student Hardware competition is held during the banquet ceremonies. Prior to the conclusion of the banquet, the hosting Committee for the subsequent SoutheastCon will introduce the upcoming city and conference to the participants. Time and space need to be allocated on the schedule to accommodate these activities.

11.4. Function Space

The conference normally requires exhibit space for the student program competitions, meeting rooms for region meetings, technical presentations, and tutorials, and banquet/reception hall(s). The following are minimum function space requirements:

- Total Conference Space: 25,000 ft² (2,325 m²)
- Largest Ballroom Size: 10,000 ft² (930 m²)
- Secondary Ballroom Size: 7,500 ft² (700 m²)
- Peak Breakout Rooms (w/Ballrooms all divided): 20
- Accommodations for MOVE truck access adjacent to venue for parking and training

NOTE: The hardware competition space needs 7,000 – 10,000 ft² of dedicated space starting noon on Thursday for setup and open 8:00 am on Friday through 16:00 Saturday (with the exception of closure during Friday reception). The MOVE Truck is 32' long x 10' wide x 13'4" high.

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11.5. Registration

The Region 3 Conference Committee will supply the logistics for operating the onsite registration. The Region 3 Conference Committee will supply the following:

- Training for the Registration Team
- Badge Printers
- Badge Stock
- Ticket Stock
- Generic Printers

11.6. Attendee Survey and Evaluation

It is always in the interest of the conference committee and the region to have information with respect to the conference and how it was conducted. One component of the conference that is not difficult to track, is the number of participants that obtained lodging at other places than the conference primary hotel. It is recommended that a survey be made available during the registration to collect information on attendees lodging location. Additionally, the Region 3 Conference Committee is interested in obtaining feedback from the participants on the conduct of the conference such that, year-over-year, we can improve how the conference is hosted. It is recommended that a survey be sent out to all participants a week after the conference. Some conference Apps allow the participants to provide feedback on the conference, including each session.

11.7. Post-Conference Debrief

On the last day of the conference, the organizing committee needs to schedule a 2-hour debrief session that includes representation from the organizing committee, the Region 3 Conference Committee, the Region 3 officers, and representatives from the next years' committee to review and brief out on the status and any challenges of the hosted conference. During this de-brief, the hosting committee should provide high level information on registrants, number of papers presented, and anticipated gross conference proceeds. This debrief is also intended to provide feedback and lessons learned to the representative of the next years' committee on what was successful and pitfalls to avoid.

A sample agenda is in the Conference Committee Google Drive.

11.8. Celebrate!

Once the conference is over and the conference committee has had a chance to de-compress, schedule a celebration event for all volunteers that assisted with organizing and executing the conference. All who participated and supported with the conduct of the conference, including their spouses or significant others, need to celebrate the accomplishment of holding a successful conference by socializing and being recognized for their efforts. It is recommended that the conference Chair(s) recognize key contributors during this event. This celebration will need to take place soon after the conference and prior to completion of the conference finances such that expenses can be accounted for in conference expenses prior to conference closeout.

12. Closing the Conference

Remember that the conference is not done until all accepted papers have been submitted to IEEE Xplore and all financial transactions have been completed, vendors paid, and funds distributed accordingly. Please refer to Attachment 2 for a checklist that will assist you with the closeout activities.

12.1. Technical Papers

Within 30-days of the close of the conference, the technical committee needs to ensure that all submitted

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papers meet conference and IEEE Xplore guidelines as established at the onset of paper acceptance. The conference copyright and ISBN must appear on the first page of each paper. Additionally, the technical committee needs to review and make sure that all accepted authors were present, or had a proxy to present their paper at the conference. Once the attendance, presentation, and listing of presentations at the conference are verified, the technical committee will need to make sure that all papers have the appropriate assigned Electronic Copyright Form (eCF) from IEEE and that there are no duplications. eCFs should have been obtained during the papers submission process, but the technical committee needs to verify prior to request for submission and upload of the completed papers by the paper submission system (EDAS).

12.2. Financial Reporting

All IEEE sponsored and co-sponsored conferences are responsible for closing the conference financials within six months after the end of the conference. The closeout includes the following activities:

- In NextGen, enter all income and expenses
- Repay any advances and loans to the region and local hosting OU
- Complete payment of all outstanding invoices
- Resolve any potential invoice disputes
- Submit schedule of tax payments (if applicable). This will include submission of 1099 forms. If your conference made payments to US citizens, or resident aliens, that would be classified as income. Do not include expense reimbursements.
- Review allocation of income and expenses according to correct conference Chart of Accounts (See Attachment 1)
- Complete the final financial report.
- Submit Certificate of Accuracy.
- Complete the audit, if required
- Distribute surplus funds and assets.
- Request closeout of conference NextGen account and distribution of funds based on agreed upon MOU between OU, Region, and any other entity.

IEEE officially closes the conference once all of the required information has been submitted.

12.3. Final Conference Report

At a minimum, the conference final report will need to be provided to IEEE MCE and the IEEE Region 3 Director as part of closeout. This will include a breakdown of conference revenue, conference expenditures, number of registrant by category, and other income such as contributions. This final report will need to be submitted with the financial closeout information.

12.4. Audit

Conference audits provide IEEE with an independent evaluation of conference finances. The audit ensures that conference income and expenses are monitored, and that the financial reports issued at the end of the conference are fair. Updated IEEE Conference Audit information can be found at <https://www.ieee.org/conferences/organizers/finance-audits.html>.

It is recommended that all conference audits be performed by IEEE Auditors. This will include completing the [Conference Audit Material Checklist \(PDF, 59 KB\)](#) and submitting all required audit materials to IEEE Conference Business Operations. Be aware that conference audit will

12.5. Audit Fees

When planning your conference budget, be sure to include an estimate for audit fees. The estimated fees for an audit by IEEE are:

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| Total Budgeted Revenue or Expense Fee (Before Loans) | Audit Fee | Audit Scope |
|--|--|---|
| US \$0–\$99,999 | None | A representative sampling of 10% of the conference financial data |
| US \$100,000 & up | 0.6% of budgeted revenue or expense, up to US\$6,000 | 100% of the conference financial data |

12.6. Closing of Accounts

Close the conference bank accounts after all invoices are paid and any surplus distributed. IEEE requires proof that the bank account is closed. The proof you submit depends on the conference bank account type.

| Type of Bank Account | Proof that Bank Account is Closed |
|----------------------|--|
| NextGen Banking | Submit a completed copy of the Concentration Banking Destroy Unused Checks form (PDF, 23 KB) . |
| Third-Party Manager | Email Conference Finance Services at conference-finance@ieee.org to determine appropriate proof of closure. |

13. Normative Schedule

13.1. Conference Planning Schedule

Hosting of a conference also requires pre-planning and establishing necessary timelines. Conference planning should include a schedule of activities that assists conference organizers to host a successful conference. IEEE recommends the following planning schedule

(https://www.ieee.org/content/dam/ieee-org/ieee/web/org/conferences/high_level_conference_timeline.pdf):

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- Region 3 submits negotiated contracts to IEEE corporate

Third Quarter

- Venue contracts approved by IEEE
- Venue contracts signed

2 Years Prior to Conference

First Quarter

- Obtain insurance coverage
- Develop conference theme and conference marketing plan
- Develop contributor categories and engagement plan
- Work with local Conventions and Visitor's Bureau for promotion of conference and participation in prior year's SoutheastCon
- Obtain conference NextGen account
- Apply and receive Seed money from Region 3 and host OU

Second Quarter

- Prepare a budget
- Review [IEEE Conference Search](#) listing
- Submit budget for SoutheastCon to the Region 3 Conference Committee
- Start development of conference website
- Start development of technical Call for Papers

Third Quarter

- Begin planning for Exhibits
- Coordinate with the Student Chapter and build the hardware track and robot
- Review and update hardware competition rules
- Start developing a list of potential corporate contributors

Fourth Quarter

- Send Hardware Competition rules to Region 3 Conference Committee for review and approval
- Complete Hardware Competition rules for presentation at prior year's SoutheastCon
- Complete Call for Papers
- Update and prepare conference website for release
- Plan and send a crew to prior year SoutheastCon

1 Year Prior to Conference

First Quarter

- Attend SoutheastCon
- Open conference website
- Release Call for Papers
- Identify / recruit technical paper reviewers

Second Quarter

- Send final Call for Papers
- Update and announce final Hardware Competition rules

Third Quarter

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- Send out Paper Acceptance/Regrets/Author Kits
- Review and submit updated budget to IEEE HQ
- Initiate conference layout planning
- Work with the Region 3 Director or designee and the Region 3 Awards Committee on schedule of activities for the Region 3 meetings
- Work with conference hotels for room pick-up lists
- Coordinate with local Visitors Bureau for volunteers and obtain locality information and handouts
- Order T-shirts and shirts for volunteers

Fourth Quarter

- Review registrations and deadlines for early registrations
- Develop conference program
- Develop technical Paper Presentation schedule
- Review conference risks and emergency management
- Update and submit budget to IEEE HQ
- Build all competition tracks
- Print all badges and prepare registrant packets
- Print conference programs
- Update program schedule on mobile app
- Coordinate and train all volunteers for their roles and responsibilities
- Prior to move-in, coordinate a walkthrough of the hosting facility with the committee members to review logistics and setup
- Coordinate and host a meeting to assemble giveaways and handouts

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ATTACHMENT 1 – NexGen Conference Chart of Account

| Task Number or Resource | Task Name | Revenue | Expense |
|-------------------------|--|---------|---------|
| Project 45413 | SoutheastCon 2021 | | |
| Task 1.0 | Registration Income | | |
| Task 1.1 | Registration Income-Society Member | | |
| Task 1.1.1 | Society Member Reg Income-Full | | |
| Task 1.1.2 | Society Member Reg Income-Limited | | |
| Task 1.1.3 | Society Member Reg Income-One Day | | |
| Task 1.1.4 | Society Mbr Reg Income-Industry Sess | | |
| Task 1.1.5 | Society Member Reg Income-Workshops | | |
| Task 1.1.6 | Society Member Reg Income-Tutorials | | |
| Task 1.1.7 | Society Member Reg Income-Advance | | |
| Task 1.1.8 | Society Member Reg Income-Virtual | | |
| Task 1.1.9 | Society Mbr Reg Income-Reg - Onsite | | |
| Task 1.1.10 | Society Member Reg Income- Other | | |
| Task 1.2 | Registration Income-IEEE Member | | |
| Task 1.2.1 | IEEE Member Reg. Income-Full | | |
| Task 1.2.2 | IEEE Member Reg. Income-Limited | | |
| Task 1.2.3 | IEEE Member Reg. Income-One Day | | |
| Task 1.2.4 | IEEE Mbr Reg Income-Industry Sess Only | | |
| Task 1.2.5 | IEEE Member Reg. Income-Workshops | | |
| Task 1.2.6 | IEEE Member Reg. Income-Tutorials | | |
| Task 1.2.7 | IEEE Member Reg. Income-Advance | | |
| Task 1.2.8 | IEEE Member Reg. Income-Virtual | | |
| Task 1.2.9 | IEEE Mbr Reg Income-Regular - Onsite | | |
| Task 1.2.10 | IEEE Member Reg. Income-Other | | |
| Task 1.3 | Registration Income-Non-Member | | |
| Task 1.3.1 | Non-Member Reg. Income-Full | | |
| Task 1.3.2 | Non-Member Reg. Income-Limited | | |
| Task 1.3.3 | Non-Member Reg. Income-One Day | | |
| Task 1.3.4 | Non-Mbr Reg Income-Industry Sess Only | | |
| Task 1.3.5 | Non-Member Reg. Income-Workshops | | |
| Task 1.3.6 | Non-Member Reg. Income-Tutorials | | |

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| Task 1.3.7 | Non-Member Reg. Income-Advance | | |
| Task 1.3.8 | Non-Member Reg. Income-Virtual | | |
| Task 1.3.9 | Non-Mbr Reg Income-Regular - Onsite | | |
| Task 1.3.10 | Non-Member Reg. Income-Other | | |
| Task 1.4 | Registration Income-Life Member | | |
| Task 1.4.1 | Life Member Reg. Income-Full | | |
| Task 1.4.2 | Life Member Reg. Income-Limited | | |
| Task 1.4.3 | Life Member Reg. Income-One Day | | |
| Task 1.4.4 | Life Mbr Reg Income-Indstry Sess Only | | |
| Task 1.4.5 | Life Member Reg. Income-Workshops | | |
| Task 1.4.6 | Life Member Reg. Income-Tutorials | | |
| Task 1.4.7 | Life Member Reg. Income-Advance | | |
| Task 1.4.8 | Life Member Reg. Income-Virtual | | |
| Task 1.4.9 | Life Mbr Reg Income-Regular - Onsite | | |
| Task 1.4.10 | Life Member Reg. Income-Other | | |
| Task 1.5 | Reg Income-Student Society Member | | |
| Task 1.5.1 | Student Society Mbr Reg Income-Full | | |
| Task 1.5.2 | Studt Society Mbr Reg Income-Limited | | |
| Task 1.5.3 | Studt Society Mbr Reg Income-One Day | | |
| Task 1.5.4 | Studt Soc Mbr Reg Income-Indstry Sess | | |
| Task 1.5.5 | Studt Society Mbr Reg Income-Workshop | | |
| Task 1.5.6 | Studt Society Mbr Reg Income-Tutorial | | |
| Task 1.5.7 | Student Society Mbr Reg Income-Adv. | | |
| Task 1.5.8 | Studt Society Mbr Reg Income-Virtual | | |
| Task 1.5.9 | Studt Society Mbr Reg Inc-Rglr Onsite | | |
| Task 1.5.10 | Student Society Mbr Reg Income-Other | | |
| Task 1.6 | Reg Income-Student IEEE Member | | |
| Task 1.6.1 | Student IEEE Member Reg. income-Full | | |
| Task 1.6.2 | Student IEEE Mbr Reg income-Limited | | |
| Task 1.6.3 | Student IEEE Mbr Reg income-One Day | | |

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| Task 1.6.4 | Studt IEEE Mbr Reg inc-Indstry Sess | | |
| Task 1.6.5 | Student IEEE Mbr Reg income-Workshop | | |
| Task 1.6.6 | Student IEEE Mbr Reg income-Tutorial | | |
| Task 1.6.7 | Student IEEE Mbr Reg income-Advance | | |
| Task 1.6.8 | Student IEEE Mbr Reg income-Virtual | | |
| Task 1.6.9 | Studt IEEE Mbr Reg - Regular, Onsite | | |
| Task 1.6.10 | Student IEEE Member Reg. income-Other | | |
| Task 1.7 | Reg Income-Student non-Member | | |
| Task 1.7.1 | Student non-Member Reg. Income-Full | | |
| Task 1.7.2 | Student non-Mbr Reg Income-Limited | | |
| Task 1.7.3 | Student non-Mbr Reg Income-One Day | | |
| Task 1.7.4 | Studt non-Mbr Reg Inc-Indstry Sess | | |
| Task 1.7.5 | Student non-Mbr Reg Income-Workshop | | |
| Task 1.7.6 | Student non-Mbr Reg Income-Tutorial | | |
| Task 1.7.7 | Student non-Mbr Reg Income-Advance | | |
| Task 1.7.8 | Student non-Mbr Reg Income-Virtual | | |
| Task 1.7.9 | Studt non-Mbr Reg Inc-Regular, Onsite | | |
| Task 1.7.10 | Student non-Member Reg. Income-Other | | |
| Task 1.8 | Registration Income-Author | | |
| Task 1.8.1 | Author Reg. income-Full | | |
| Task 1.8.2 | Author Reg. income-Limited | | |
| Task 1.8.3 | Author Reg. income-One Day | | |
| Task 1.8.4 | Author Reg income-Industry Sess Only | | |
| Task 1.8.5 | Author Reg. income-Workshops | | |
| Task 1.8.6 | Author Reg. income-Tutorials | | |
| Task 1.8.7 | Author Reg. income-Advance | | |
| Task 1.8.8 | Author Reg. income-Virtual | | |
| Task 1.8.9 | Author Reg. income-Regular - Onsite | | |
| Task 1.8.10 | Author Reg. income-Regular - Other | | |
| Task 1.9 | Registration Income-Other Reg. Income | | |

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| Task 1.9.1 | Other Reg. Income-Full | | |
| Task 1.9.2 | Other Reg. Income-Limited | | |
| Task 1.9.3 | Other Reg. Income-One Day | | |
| Task 1.9.4 | Other Reg Income-Industry Sess Only | | |
| Task 1.9.5 | Other Reg. Income-Workshops | | |
| Task 1.9.6 | Other Reg. Income-Tutorials | | |
| Task 1.9.7 | Other Reg. Income-Advance | | |
| Task 1.9.8 | Other Reg. Income-Virtual | | |
| Task 1.9.9 | Other Reg. Income-Regular Onsite | | |
| Task 1.9.10 | Other Reg. Income-Other | | |
| Task 2.0 | Social Functions Income | | |
| Task 2.1 | Sub Soc Evnt Income- Exhibitor Receipt | | |
| Task 2.2 | Sub Social Evnt Income-Conf Reception | | |
| Task 2.3 | Sub Soc Evnt Income- Exhibitor Receipt | | |
| Task 2.5 | Sub Soc Ticketed Income- Add-on Tour | | |
| Task 2.6 | Sub Soc Ticketed Income- Conf Party | | |
| Task 2.7 | Sub Soc Ticketed Income- Conf Lunch | | |
| Task 2.8 | Sub Soc Ticketed Income- Conf Banquet | | |
| Task 2.9 | Sub Soc Evnt Income-Other | | |
| Task 3.0 | Conference Publications | | |
| Task 3.1 | Conf Pubs-Over Length Page charges | | |
| Task 3.2 | Conf Publications-Publications Sales | | |
| Task 3.3 | Conf Publications-Pubs Sales Digest | | |
| Task 3.4 | Conf Publications-Proceedings Sales | | |
| Task 3.5 | Conference Publications-Other | | |
| Task 4.0 | Corp Contributor/Advertising Revenue | | |
| Task 4.1 | Corp Contributor /Ad Revenue-Highest Lvl | | |
| Task 4.2 | Corp Contributor /Advertising Rev-Tier 2 | | |
| Task 4.3 | Corp Contributor /Advertising Rev-Tier 3 | | |
| Task 4.4 | Corp Contributor /Advertising Rev-Tier 4 | | |
| Task 4.5 | Corp Contributor /Advertising Rev-Tier 5 | | |
| Task 4.6 | Corp Contributor /Advertising Rev-Other | | |

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| Task 5.0 | Exhibit Revenue | | |
| Task 5.1 | Exhibit Revenue-Booth Revenue | | |
| Task 5.2 | Exhibit Revenue-Exhibitor Option A | | |
| Task 5.3 | Exhibit Revenue-Exhibitor Option B | | |
| Task 5.4 | Exhibit Revenue-Exhibitor Option C | | |
| Task 5.5 | Exhibit Revenue-Platinum Patron | | |
| Task 5.6 | Exhibit Revenue-Gold Patron | | |
| Task 5.7 | Exhibit Revenue-Silver Patron | | |
| Task 5.8 | Exhibit Revenue-Bronze Patron | | |
| Task 5.9 | Exhibit Revenue-Other 1 | | |
| Task 5.10 | Exhibit Revenue-Other 2 | | |
| Task 6.0 | Grant Revenue | | |
| Task 6.1 | Grant Revenue-Donations | | |
| Task 6.2 | Grant Revenue-Government Grants | | |
| Task 6.3 | Grant Revenue-Other Grants | | |
| Task 7.0 | Bank Interest Earned | | |
| Task 8.0 | VAT Reclaimed | | |
| Task 9.0 | Loans Advanced | | |
| Task 10.0 | Hotel Rebate / Commissions | | |
| Task 11.0 | CVB Rebates | | |
| Task 12.0 | Other Revenue | | |
| Task 20.0 | Facility Rental | | |
| Task 20.1 | Facility/Venue Rental-Conv Cntr/Hotel | | |
| Task 20.2 | Facility Rental-Attrition/Cancelation | | |
| Task 20.3 | Facility Rental-Exhibits Space Rental | | |
| Task 20.4 | Facility Rental-Meeting Space Rental | | |
| Task 20.5 | Facility Rental-Other Space Expenses | | |
| Task 21.0 | Food and Beverage (2) | | |
| Task 21.1 | Food and Beverage (2)-Coffee Breaks | | |
| Task 21.2 | Food and Beverage (2)-Breakfast | | |
| Task 21.3 | Food and Beverage (2)-Lunch | | |
| Task 21.4 | Food and Beverage (2)-Banquets | | |
| Task 21.5 | Food and Beverage (2)-Workshop Meals | | |
| Task 21.6 | Food and Beverage (2)-Tutorial Meals | | |
| Task 21.7 | Food and Beverage (2)-Receptions | | |
| Task 21.8 | Food and Bev (2)-Exhibit Hall Lunch | | |

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| Task 21.9 | F&B-Water Stations in Session Rooms | | |
| Task 21.10 | Food and Beverage (2)-Gratuity | | |
| Task 21.11 | Food & Bev (2)-Other General Conf F&B | | |
| Task 22.0 | Conference Local / Onsite Expenses | | |
| Task 22.1 | Local/Onsite Exp-Fees/Gifts/Giveaways | | |
| Task 22.2 | Conf Local/Onsite Exp-Pmts Local Chap | | |
| Task 22.3 | Local/Onsite Exp-Music Licensing Fees | | |
| Task 22.4 | Local/Onsite Exp-Conf On-site Signage | | |
| Task 22.5 | Conf Local/Onsite Exp-Conf Security | | |
| Task 22.6 | Local/Onsite Exp-On-site First Aid | | |
| Task 22.7 | Conf Local/Onsite Expenses-Gratuities | | |
| Task 22.8 | Conf Local/Onsite Exp-Internet & Tele | | |
| Task 22.9 | Conf Local/Onsite Exp-Conf Mobile App | | |
| Task 22.10 | Conf Local/Onsite Exp-Transp (ex bus) | | |
| Task 22.11 | Conf Local/Onsite Exp-LOC admin exp | | |
| Task 22.12 | Conf Local/Onsite Expenses-Concierge | | |
| Task 22.13 | Local/Onsite Exps-Stage & Decor Fees | | |
| Task 22.14 | Conf Local/Onsite Expenses-Parking | | |
| Task 22.15 | Local/Onsite Exps-Other Local Expense | | |
| Task 23.0 | Exhibit local / on-site Expenses | | |
| Task 23.1 | Exh local/on-site Exp- Service Dvlpmt | | |
| Task 23.2 | Exh local/on-site Expenses- App | | |
| Task 23.3 | Exh local/on-site Exp-Floorplan Sftwr | | |
| Task 23.4 | Exh local/on-site Exp- Set Up & Décor | | |
| Task 23.5 | Exh local/on-site Exp-Sales Sprt/Comm | | |
| Task 23.6 | Exh local/on-site Exp- Security | | |
| Task 23.7 | Exh local/on-site Exp- Transport | | |
| Task 23.8 | Exh local/on-site Exp-on-site signage | | |
| Task 23.9 | Exh local/on-site Exp-Freight/Carpet | | |

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|-------------------|---------------------------------------|--|--|
| Task 23.10 | Exh local/on-site Expenses-Other | | |
| Task 24.0 | Social Func/Banquet/Reception | | |
| Task 24.1 | Soc Func/Banquet/Reception-Facilities | | |
| Task 24.2 | Social Func/ Banquet/Recept-Transport | | |
| Task 24.3 | Social Func-F&B-Exp unique to SF's | | |
| Task 24.4 | Sub/Student Event/Social Func/Banquet | | |
| Task 24.5 | Sub Soc Evnt/Banquet/Tut. Wrkshp Exp | | |
| Task 25.0 | Audio-Visual | | |
| Task 25.1 | Audio-Visual-Projectors & Screens | | |
| Task 25.2 | Audio-Visual-Video Recording | | |
| Task 25.3 | Audio-Visual-Real-time Pres Streaming | | |
| Task 25.4 | Audio-Visual-Virtual Platform Costs | | |
| Task 25.5 | Audio-Visual-Social Network Comments | | |
| Task 25.6 | Audio-Visual-Student Event | | |
| Task 25.7 | Audio-Visual-Other A/V Expenses | | |
| Task 26.0 | Site Inspections | | |
| Task 26.1 | Site Inspections-Volunteer Travel | | |
| Task 26.2 | Site Inspections-Reimb Vendor Exp | | |
| Task 26.3 | Site Inspections-Staff Travel | | |
| Task 26.4 | Site Inspec-Other/Custom to Conf Site | | |
| Task 26.5 | Site Inspections-Other Inspection Exp | | |
| Task 27.0 | Travel | | |
| Task 27.1 | Travel-Volunteer Travel | | |
| Task 27.2 | Travel-Vendor Travel | | |
| Task 27.3 | Travel-Staff Travel | | |
| Task 27.4 | Travel-Other | | |
| Task 28.0 | Award Expenses | | |
| Task 28.1 | Award Expenses-Conf Best Paper Awards | | |
| Task 28.2 | Award Expenses-IEEE-level Award Exp. | | |
| Task 28.3 | Award Expenses-Other Award Expenses | | |
| Task 29.0 | Travel Grants | | |
| Task 29.1 | Travel Grants-Student Travel Grants | | |

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|-------------------|---------------------------------------|--|--|
| Task 29.2 | Travel Grants-Diversity Travel Grants | | |
| Task 29.3 | Travel Grants-Other Travel Grants | | |
| Task 30.0 | Committee Expenses | | |
| Task 30.1 | Committee Exp-Steering Comm Meetings | | |
| Task 30.2 | Committee Exp-Organizing Com Meetings | | |
| Task 30.3 | Committee Expenses-OC Travel | | |
| Task 30.4 | Committee Expenses-OC Food & Beverage | | |
| Task 30.5 | Committee Exp-Other Expenses | | |
| Task 31.0 | Professional Conf Organizer (PCO) | | |
| Task 31.1 | PCO-Physical PCO Expenses | | |
| Task 31.2 | PCO- Virtual Conference System | | |
| Task 31.3 | PCO-Virtual Conference Support | | |
| Task 31.4 | PCO-Exhibit Sales Commissions | | |
| Task 31.5 | Profess Conf Organizer (PCO)-Travel | | |
| Task 31.6 | Profess Conf Organizer (PCO) -Other | | |
| Task 32.0 | Registration Expenses | | |
| Task 32.1 | Reg Expenses-Registration Provider | | |
| Task 32.2 | Reg Expenses-Exhibit Registration | | |
| Task 32.3 | Reg Expenses-Conference Registration | | |
| Task 32.4 | Reg Expenses-Payment Processing Fees | | |
| Task 32.5 | Reg Expenses-Registration supplies | | |
| Task 32.6 | Reg Expenses-Other Reg Expenses | | |
| Task 33.0 | Promotion / Advertising | | |
| Task 33.1 | Promo/Advertising-Email Vendor Cost | | |
| Task 33.2 | Promo/Advertising-Exhibit Promo | | |
| Task 33.3 | Promo/Advertising-Conf Promotion | | |
| Task 33.4 | Promo/Ads-Exhibiting at Confs | | |
| Task 33.5 | Promo/Advertising-Public Dvlpmt Svcs | | |
| Task 33.6 | Promo/Advertising-Website | | |
| Task 33.7 | Promo/Advertising-Paid Ad Costs | | |
| Task 33.8 | Promo/Advertising-E/mail list rental | | |
| Task 33.9 | Promo/Advertising-Printing materials | | |
| Task 33.10 | Promotion / Advertising-Social Media | | |

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| Task 33.11 | Promo/Advertising-Other Expenses | | |
| Task 34.0 | Logistics/Shipping | | |
| Task 34.1 | Logistics/Shipping-Shipping Services | | |
| Task 34.2 | Logistic/Shipping-Un/Packing/Handling | | |
| Task 34.3 | Logistic/Shipping-Other L&S Expenses | | |
| Task 35.0 | Publications Expenses | | |
| Task 35.1 | Pubs Exp-Peer Review Software | | |
| Task 35.2 | Pubs Exp-Proceedings Prod & Programs | | |
| Task 35.3 | Pubs Exp-Tutorial Booklet | | |
| Task 35.4 | Pubs Exp-Conf Publication Production | | |
| Task 35.5 | Pubs Exp-Peer Review Expense | | |
| Task 35.6 | Pubs Exp-Publication Printing | | |
| Task 35.7 | Pubs Exp-Other Pub Exp | | |
| Task 36.0 | Speaker Expenses | | |
| Task 36.1 | Speaker Expenses-Honorarium | | |
| Task 36.2 | Speaker Expenses-Lodging | | |
| Task 36.3 | Speaker Expenses-Travel | | |
| Task 36.4 | Speaker Expenses-Key Note | | |
| Task 36.5 | Speaker Expenses-Tutorial | | |
| Task 36.6 | Speaker Expenses-Workshop | | |
| Task 36.7 | Speaker Expenses-Other | | |
| Task 37.0 | Finance Expenses | | |
| Task 37.1 | Finance Expenses-Bank Fees | | |
| Task 37.2 | Finance Expenses-Audit Fees | | |
| Task 37.3 | Finance Expenses-Ccy. Conversion Fees | | |
| Task 37.4 | Finance Expenses-Other Expenses | | |
| Task 38.0 | VAT Owed | | |
| Task 38.1 | VAT Owed-VAT Owed | | |
| Task 39.0 | Insurance Expense | | |
| Task 39.1 | Insurance Exp-Disruption/Cancellation | | |
| Task 39.2 | Insurance Expense-Exhibit Insurance | | |
| Task 39.3 | Insurance Expense-Other Insurance | | |
| Task 40.0 | Society / OU Governance | | |
| Task 40.1 | Society / OU Governance-SC Travel | | |
| Task 40.2 | Society/OU Gov-SC Meeting F&B | | |

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| | | | |
|------------------|---------------------------------------|--|--|
| Task 40.3 | Society/OU Gov-Society Admin Meetings | | |
| Task 40.4 | Society/OU Gov- OU Volunteer Travel | | |
| Task 40.5 | Society/OU Gov- Society staff Travel | | |
| Task 40.6 | Society/OU Gov- Society Meeting F&B | | |
| Task 40.7 | Society/OU Gov-Other Committee Exp | | |
| Task 41.0 | Contingency | | |
| Task 41.1 | Contingency-Contingency | | |
| Task 42.0 | Other Conference Expenses | | |
| Task 42.1 | Other Expenses-Other General Expenses | | |
| Task 42.2 | Other Exp-Other/Move Truck Parking | | |
| Task 43.0 | Administration Fee | | |
| Task 43.1 | Administration Fee-Conference Admin. | | |
| Task 43.2 | Admin. Fee-Admin Fee percentage | | |
| Task 44.0 | Entitlement | | |
| Task 44.1 | Entitlement-Entitlement | | |
| Task 45.0 | Budgeted Surplus Requirement | | |
| Task 45.1 | Budgeted Surplus Requirement | | |

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ATTACHMENT 2 – Conference Closeout 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? |
|---|--|---|--|---|
| | 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 | | |
| | 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 NextGen Banking Accounts | IEEE Conference Finance |

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| | | | | |
|--|---------------------------|---|---|--|
| | 4-5 months AFTER end date | <p>Prepare and submit all audit material to independent auditor</p> <p>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.</p> | 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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ATTACHMENT 3 – 2020/2021 Region 3 Conference Committee

| | |
|---------------------------------------|--------------------------------------|
| Conference Committee | Eric Grigorian, Chair |
| Conference Vice Chair Committee | Glenn Parker |
| Director | Jill Gostin |
| Director Elect | Theresa Brunasso |
| Past Conference Committee Chair | Sean Haynes |
| Regional Student Activities Chair | Bailey Heyman |
| Conference Operations Specialist | Charles Lord |
| Treasurer | John Balsam |
| Former Region 3 Director | Jim Conrad |
| Technical Steering Subcommittee Chair | Jim Conrad |
| Southeastcon 2020 | Charles Lord / Parag Upadhyay |
| Southeastcon 2021 | Wyman Williams |
| Southeastcon 2022 | Warren Nicholson / Mohamed El-Sharkh |
| SoutheastCon 2023 | Joe Juisai |

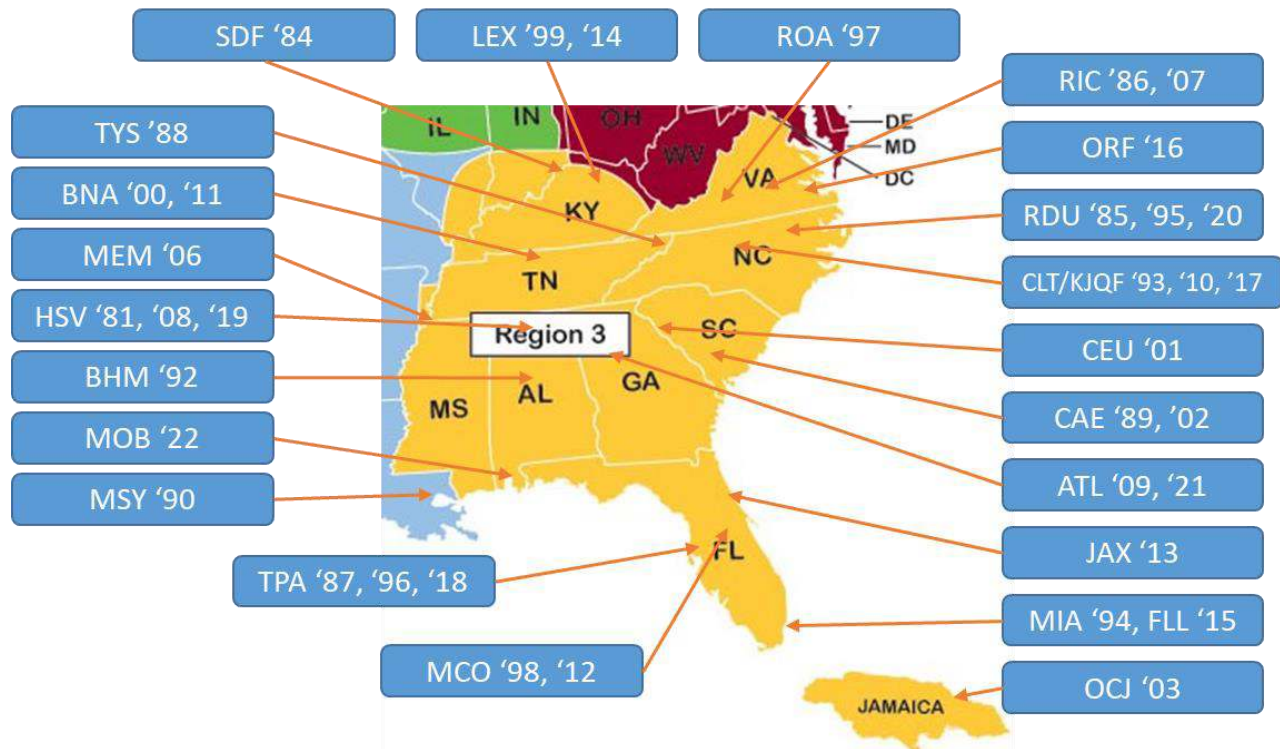
2022 Region 3 Conference Committee

| | |
|---------------------------------------|--------------------------------------|
| Conference Committee | Eric Ackerman, Chair |
| Conference Vice Chair Committee | |
| Director | Theresa Brunasso |
| Director Elect | Eric Grigorian |
| Past Conference Committee Chair | Eric Grigorian |
| Regional Student Activities Chair | Bailey Heyman |
| Conference Operations Specialist | Charles Lord |
| Treasurer | John Balsam |
| Former Region 3 Director | Jill Gostin |
| Technical Steering Subcommittee Chair | Jim Conrad |
| Southeastcon 2021 | Wyman Williams |
| Southeastcon 2022 | Warren Nicholson / Mohamed El-Sharkh |
| SoutheastCon 2023 | Joe Juisai |
| SoutheastCon 2024 | Alessio Medda/Tamseel Syed |

If you need to contact any of the conference committee members, please contact Region 3 webmaster for contact information.

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ATTACHMENT 4 –SoutheastCon Locations



History of all SoutheastCons:

SoutheastCon locations are listed in the following table.

- 1964, Clearwater, FL
- 1965, Raleigh, NC
- 1966, Atlanta, GA
- 1967, Jackson, MS
- 1968, New Orleans, LA
- 1969, Raleigh, NC
- 1970, Gainesville, FL
- 1971, Charlottesville, VA
- 1972, Knoxville, TN
- 1973, Louisville, KY
- 1974, Orlando, FL
- 1975, Charlotte, NC
- 1976, Clemson, SC
- 1977, Williamsburg, VA
- 1978, Atlanta, GA
- 1979, Roanoke, VA
- 1980, Nashville, TN
- 1981, Huntsville, AL
- 1982, Destin, FL
- 1983, Orlando, FL
- 1984, Louisville, KY
- 1985, Raleigh, NC
- 1986, Richmond, VA
- 1987, Tampa, FL
- 1988, Knoxville, TN
- 1989, Columbia, SC
- 1990, New Orleans, LA
- 1991, Williamsburg, VA
- 1992, Birmingham, AL
- 1993, Charlotte, NC
- 1994, Miami, FL
- 1995, Raleigh, NC
- 1996, Tampa, FL
- 1997, Blacksburg, VA
- 1998, Orlando, FL
- 1999, Lexington, KY
- 2000, Nashville, TN
- 2001, Clemson, SC
- 2002, Columbia, SC
- 2003, Ocho Rios, Jamaica
- 2004, Greensboro, NC
- 2005, Fort Lauderdale, FL
- 2006, Memphis, TN
- 2007, Richmond, VA
- 2008, Huntsville, AL
- 2009, Atlanta, GA
- 2010, Charlotte, NC
- 2011, Nashville, TN
- 2012, Orlando, FL
- 2013, Jacksonville, FL
- 2014, Lexington, KY

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- 2015, Fort Lauderdale, FL
- 2016, Norfolk, VA
- 2017, Charlotte, NC
-
- 2018, St. Petersburg, FL
- 2019, Huntsville, AL
- 2020, Raleigh, NC
- 2021, Atlanta, GA

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ATTACHMENT 5 –Memorandum of Understanding Template

THIS MEMORANDUM OF UNDERSTANDING (this "MOU"), entered into on DD-MMM-YYYY, by and between Region 03 - Southeastern USA ("Financial Sponsoring Party"), XXXXX Section ("Financial Sponsoring Party"), (collectively known as the "Sponsors"), sets forth the relationship and obligations relating to the SoutheastCon 20YY (the "Conference") to be held on or about DD-MMM-YYYY, in CITY, ST, USA.

FINANCIAL LIABILITY: It is understood that financial liability for the Conference is the responsibility and obligation of the Sponsors as set forth in the IEEE Conference Application. To view the Financial Sponsor(s) liability percentages refer to the [Conference Application URL](#).

RESPONSIBILITIES OF THE SPONSORS: The responsibilities of the Sponsors shall be as described in the IEEE Conference Application submitted. The Conference shall be conducted in accordance with IEEE's bylaws and policies, including, but not limited to, the IEEE Conference Organization Manual.

TERMINATION: Any Sponsor may terminate this MOU at any time by providing at least thirty (30) days' prior written notice to the other Sponsor(s).

NON-BINDING: THIS MOU IS NOT INTENDED TO CONSTITUTE A BINDING EXPRESSION OF THE MUTUAL INTENT OF THE PARTIES REGARDING THE SUBJECT MATTER HEREOF. Neither party (nor any of their respective representatives) shall have any legally binding obligations, rights or liabilities of any nature whatsoever to any party hereto or to any other persons pursuant to this MOU.

This MOU shall not be valid until approved and executed by authorized representatives of both the Sponsors and acknowledged by IEEE Conference Services.

Region 03 - Southeastern USA:

Name:

Title: Region 3 Director

Email:

Status: Approved

XXXXXXX Section:

Name:

Title: XXXXXXXX Section Chair

Email:

Status: Approved

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ATTACHMENT 6 –EDAS Technical Program Chair Guide

This guide lists the various features of EDAS platform that can be used by TPC Co-Chairs. The snippets are from the 2021 version of the SoutheastCon conference obtained from <https://edas.info>. In addition to these features, the TPC Co-Chair/Chair can utilize other help options available via EDAS by either sending an email to help@edas.info or visiting <https://edas.info/help.php>.

The screenshot below in Figure 1 shows the “TPC” tab which includes adding reviewers, deleting reviewers, adding topics for TPC member selection, listing, and exporting the names and other details for the reviewers, categories for TPC members, notifying reviewers via email, etc.

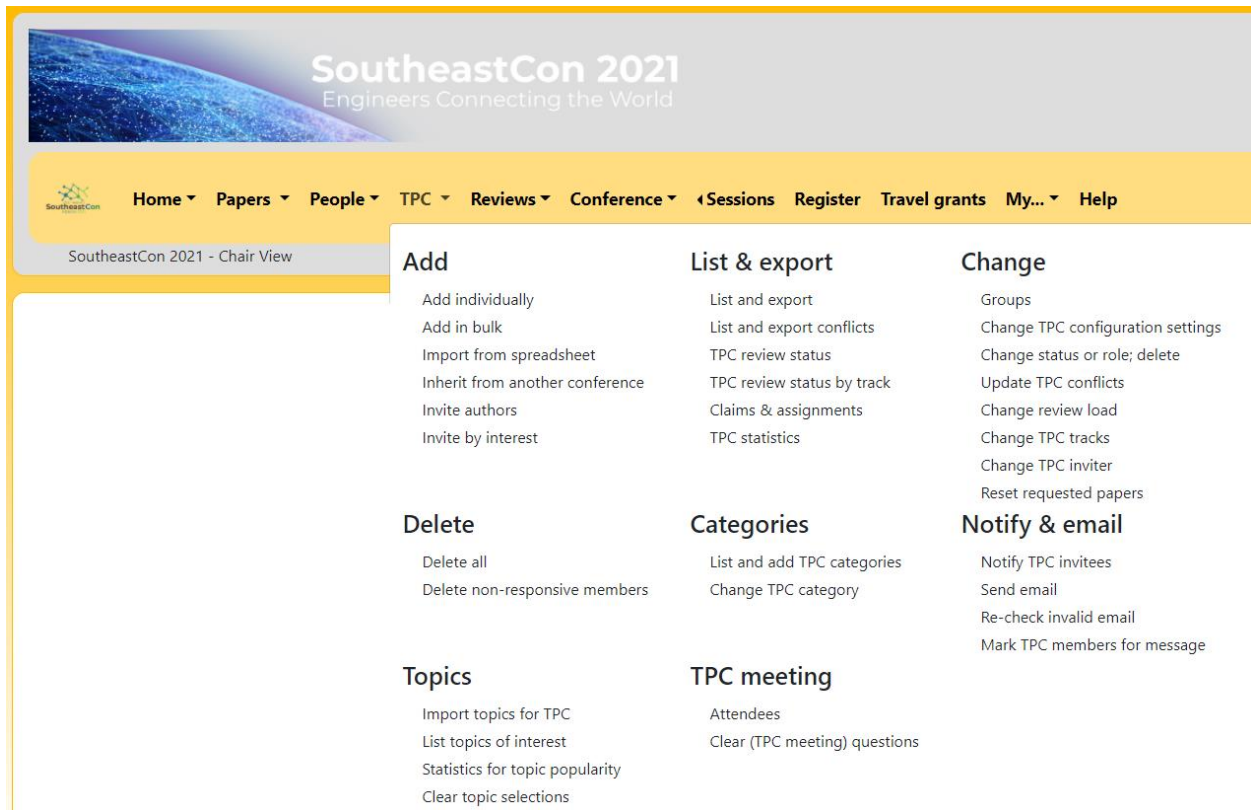


Figure 1: TPC tab under EDAS

The screenshot in Figure 2 below shows the “Reviews” tab. Using this tab a co-chair/chair can assign reviews to TPC members. This assignment can either be done manually or setup so every new paper upload is automatically assigned reviewers based on the topics the author selects. This tab also includes means of communication with the authors.

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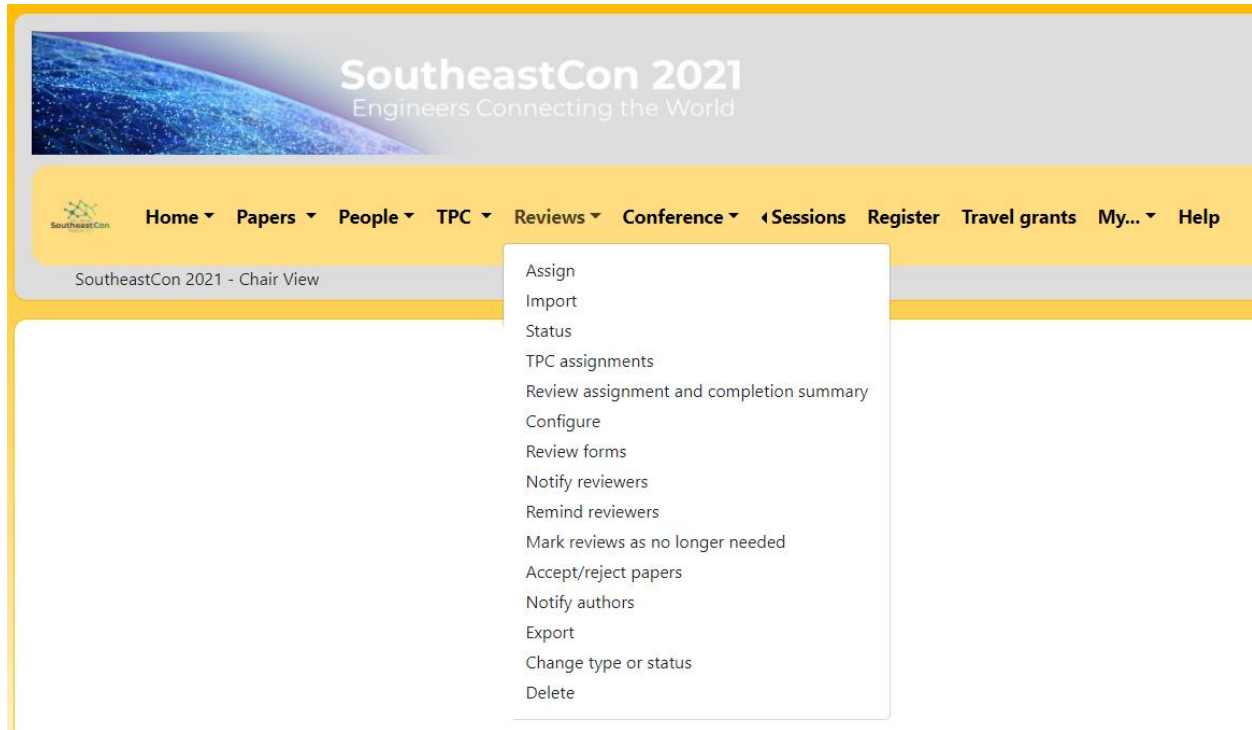


Figure 2. Reviews tab under EDAS

The screenshot in Figure 3 below shows the “Papers” tab under EDAS. Using this tab, the TPC co-chair/chair can access everything related to the papers submitted to SoutheastCon for consideration. The statistics of all papers submitted, options to download the list of all papers, compare various versions of the papers, etc., can all be accessed using this tab. Each of these sub-groups have exclusive functionality whose details can be obtained via the help paper for EDAS.

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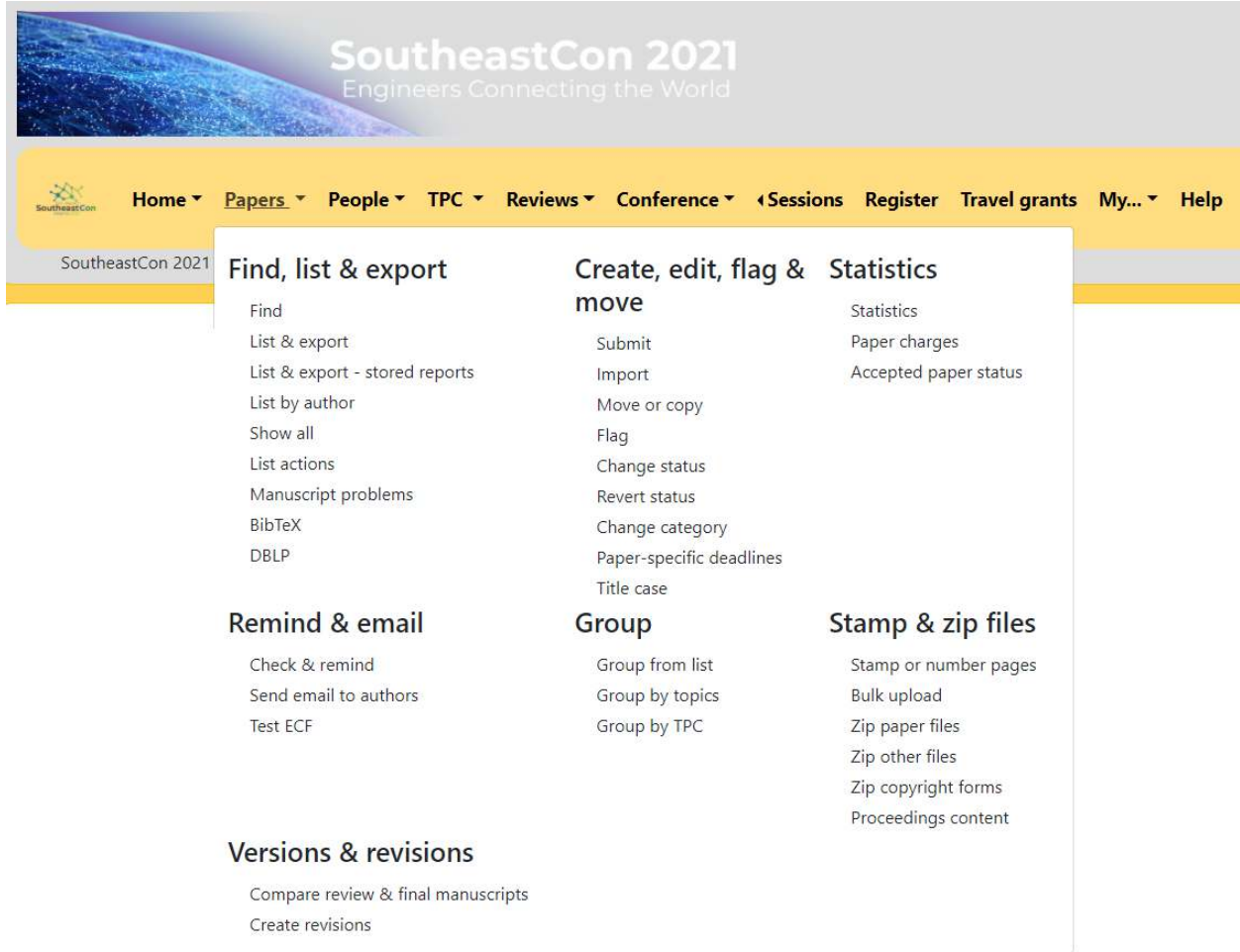


Figure 3. Papers tab under EDAS

The screenshot in Figure 4 shows the “Conference” tab which enlists options for overall conference configuration. The high-level configuration for the conference can be changed using various options under this tab. Using this tab, the “Call for Papers” emails can be sent to the subscribers of EDAS email notifications. Please ensure the “Topics” tab is populated to reach a larger audience among the EDAS users. EDAS allows a maximum of 5 Topics to be listed and only a maximum of 3 CFP email broadcasts to be sent out using this feature.

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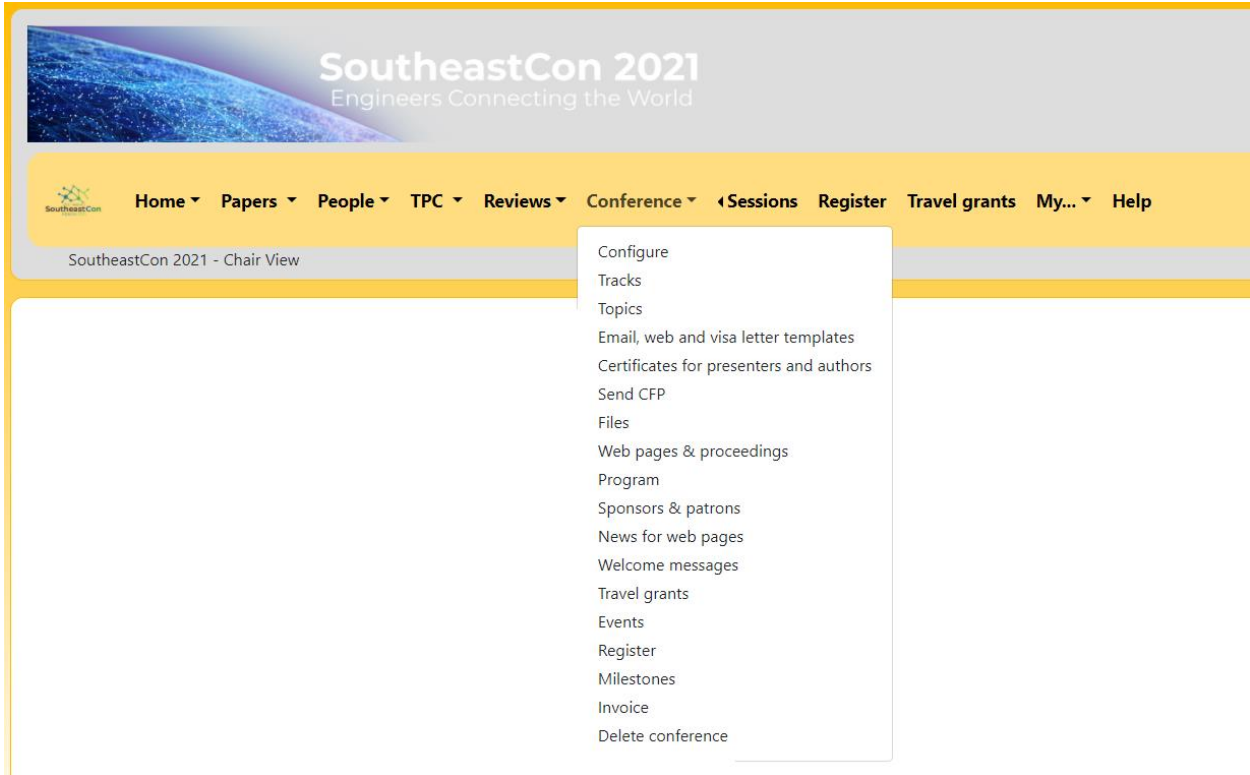


Figure 4. Conference tab under EDAS

The screenshot in Figure 6 shows the “Sessions” tab. This includes content related to scheduling sessions and adding papers to various sessions once the final selection of papers is made. Some of this information would also be visible to the authors like session information, the session chair, etc.

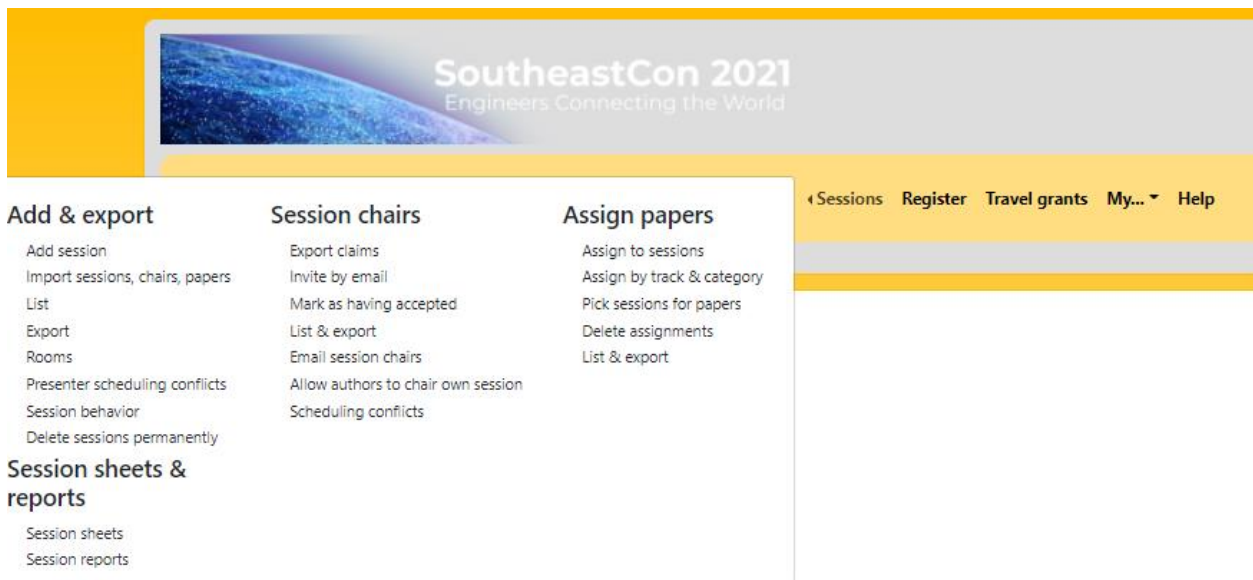


Figure 5. Sessions tab under EDAS

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The help line for EDAS is a pretty useful feature which can also be used to assist with adding any custom features according to the conference requirements.

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The below timeline shows the list of tasks that were followed by the 2021 TPC Co-Chairs. It is a useful list to keep track of the conference and any tasks that needs to be done before, during and after the conference.

| Due | Task | Responsible | Explanation | Notes | Reminded | Completed | Completed by |
|--------------|---|--------------------|---|-------|----------|-----------|--------------|
| Aug 31, 2020 | | chair | Chairs configure the PDF and other track parameters, including any society PDF and margin requirements. | | | | |
| Sep 15, 2020 | Kickoff conference call with EDAS staff | chair | Key conference staff and society representatives organize conference call to discuss conference setup. | | | | |
| Nov 10, 2020 | Upload Letter of Acquisition | chair, publication | The Letter of Acquisition (LoA) is issued by IEEE or ACM and describes the conference, such as ISBN numbers. | | | | |
| Dec 4, 2020 | Copyright set up | chair, publication | The conference chair sets up the basic conference copyright configuration via Conference:Configure, Copyright , including whether authors provide copyright releases via file upload, the IEEE electronic copyright function (eCF) or a form question. | | | | |
| Dec 7, 2020 | Call-for-papers (CFP) | chair | Chairs may send out a call-for-papers email via EDAS. | | | | |
| Dec 7, 2020 | Review settings and forms | chair | Chairs configure the review deadlines and settings, and create the review form(s). | | | | |
| Dec 10, 2020 | IEEE electronic copyright | EDAS | EDAS staff requests IEEE to set up the electronic copyright (eCF) function. | | | | |
| Dec 24, 2020 | Page margins and PDF checks set for final manuscripts | EDAS | EDAS staff checks that the manuscript page margins and PDF parameters for final manuscripts have been configured by the chairs. | | | | |
| Jan 9, 2021 | Conference name in EDAS and LoA matches | EDAS | EDAS staff compares that the conference name in the letter of acquisition (LOA) and in the EDAS configuration matches . | | | | |

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| | | | | | | | |
|--------------|---|--------------------|--|--|--|--|--|
| Jan 9, 2021 | Conference dates in EDAS and society database matches | chair | Conference chairs checks that the conference dates in the EDAS configuration matches the IEEE conference database | | | | |
| Jan 9, 2021 | Conference logo banner uploaded | chair | The conference chairs upload the conference logo via Conference:Web pages & proceedings, "upload assets". | | | | |
| Jan 9, 2021 | Proceedings template completed | EDAS | EDAS staff sets up the web (HTML) template for the proceedings. | | | | |
| Jan 9, 2021 | ISBN, ISSN and catalog number in EDAS and LoA match | EDAS | EDAS staff checks that the ISBN, ISSN and catalog numbers in the conference configuration and the letter-of-acquisition (LoA) match. | | | | |
| Jan 9, 2021 | Travel grants | chair, publication | Chairs configure conference travel grants, if applicable. | | | | |
| Jan 14, 2021 | Registration events | chair | Chairs create registration events in Conference:Events. | | | | |
| Jan 23, 2021 | Proceeding services set up | chair, publication | Chairs determine what kind of proceeding-related EDAS services they need: master | | | | |
| Jan 23, 2021 | Xplore setup completed | chair, publication | Conference configures whether IEEE Xplore is needed | | | | |
| Jan 29, 2021 | Welcome message added | chair, publication | The chairs add welcome messages and forewords for the conference via Conference:Welcome messages. | | | | |
| Jan 29, 2021 | flash drive count finalized | chair, publication | The publication chair provides the number of media content at Conference:Configure. | | | | |
| Feb 10, 2021 | Committee members | chair | The conference chairs add committee members (e.g., the organizing committee) via People:Committees. | | | | |
| Feb 24, 2021 | Conference program and session chairs | chair | The conference chairs set up the conference sessions (Conference:Sessions), assign papers to sessions and designate the conference | | | | |

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| | | | | | | | |
|--------------|--|--------------------|--|--|--|--|--|
| | | | session chairs. | | | | |
| Feb 24, 2021 | Accepted papers have been assigned to sessions | chair | The chairs assign accepted papers to conference sessions via Conference:Sessions. | | | | |
| Mar 5, 2021 | PDF final manuscripts checked | EDAS | EDAS staff checks that the PDF files for final manuscripts meet publisher requirements. | | | | |
| Mar 5, 2021 | PDF fixed | EDAS | EDAS staff works with authors to repair any PDF documents that do not meet publisher requirements. See cost if more than 2% of papers. | | | | |
| Mar 7, 2021 | List of sponsors completed | chair | The chairs add any conference sponsors and patrons via Conference:Sponsors & Patrons. | | | | |
| Mar 7, 2021 | Master content draft ready | EDAS | EDAS staff creates a draft of the proceedings content. | | | | |
| Mar 7, 2021 | Check publication services | chair | The conference confirms that EDAS will provide (or has provided) the following: proceedings content and IEEE Xplore submission | | | | |
| Mar 8, 2021 | Master content approved | chair, publication | The publication chair approves the content for the media content. | | | | |
| Mar 9, 2021 | Attendee badges | chair | Chairs print attendee badges, if desired. | | | | |
| Mar 17, 2021 | No-shows entered | chair, publication | The conference chairs enter any no-show papers, i.e., authors of accepted papers that did not appear at the conference. | | | | |
| Mar 20, 2021 | Xplore: check PDF files | EDAS | EDAS staff checks PDF files for IEEE Xplore compliance. Additional charges if more than 2% of papers. | | | | |
| Mar 24, 2021 | Xplore draft finalized | EDAS | EDAS staff prepares the IEEE Xplore (digital library) package for conference approval. | | | | |
| Mar 30, 2021 | Xplore approved by chair | chair, publication | The publication chair approves the IEEE Xplore draft. | | | | |

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| | | | | | | | |
|--------------|---|------|---|--|--|--|--|
| Apr 9, 2021 | Xplore shipped to IEEE | EDAS | EDAS staff uploads the IEEE Xplore package and attendee media content to the IEEE server. | | | | |
| Apr 12, 2021 | Xplore received by IEEE | EDAS | IEEE has received Xplore package. | | | | |
| May 24, 2021 | Xplore published by IEEE at http://ieeexplore.ieee.org/browse/conferences/title/ | EDAS | IEEE has published the Xplore content. | | | | |