CONFERENCE TIMELINE - GUIDELINES

START	24+ MONTHS	24 - 18 MONTHS		18 - 15 MONTHS	15 - 12 MONTHS		12 - 9 MONTHS	9 - 6 MONTHS	6 - 4 MONTHS	4 - 3 MONTHS	2 MONTHS	6 - 4 WEEKS	2 DAYS	HOLD CONFERENCE	1 WEEK	3 WEEKS	1 MONTH	3 MONTHS	4 - 5 MONTHS	5 - 6 MONTHS
Determine and apply for sponsorship from all applicable IEEE and/or non-IEEE organizational units (OU)	*Obtain Sponsorship*	*Register your conference submit Conference Application and approve MOU*	Contact IEEE Section where conference will be held.	Develop communications plan, marketing materials and conference website	Develop paper management process or identify system vendor	*Develop technical program, establish paper submission process and deadlines*	Create website for paper submissions. Work with paper management company, if applicable	Plan social activities and tour program, if applicable	Complete paper review process. Finalize technical program. Notify speakers	Solicit bids from proceedings production vendors based on accepted papers	Review room block with hotel against attendance and contracts	Deadline for early registration	Confirm onsite logistics with venue	Onsite Registration	**Submit Conference Proceedings/Content (Xplore CD and other media types) per LOA**			Distribute surplus	Prepare and submit all audit material. *Audit required for IEEE OU total is >50% and budgeted income or expenses > USD$250K*	
	Engage with IEEE MCE for conference education, guidance, services and tools.	Submit conference committee list and initial budget forecast to Conference Business Operations	*Submit Conference Publication Form to obtain Letter of Acquisition (LOA), IF publishing with IEEE*	Send request for proposal (RFP) to exhibit decorators and develop exhibitor prospectus, if applicable	Establish a Call For Papers (CFP)	Update conference website with page/link about CFP information	Obtain permission from related IEEE OUs to market to their members using e-Notice	Send out RFPs for ground transportation and finalize contract, if applicable	Create and post advance program on conference website	Order attendee giveaways, speaker gifts, and/or conference shirts	Send final program, advertising, publicity and registration reminders	Preliminary specifications to conference site. Order signage and recognition products	Set-up registration area, exhibit space, information booth, office area	Monitor Budget	Committee members submit final statistics and lessons learned to OU	Registration clean up: process refunds, receipts and balances due	Process outstanding bills	*Close conference bank account; submit proof of account closure*		
		Review IEEE Insurance coverage and determine if additional coverage is required	*Register for Electronic IEEE Copyright Form (eCF) if proceedings are acquired by IEEE*	Begin outreach to educational institutions, corporations, government and industry for support and patronage	Establish a Visa process for international attendees and post on the conference website	Meet with previous year's committee to discuss best practices	*Establish registration process and ensure registration service is Payment Card Industry (PCI) compliant*	Launch registration site	Determine preliminary exhibitor space assignments, if applicable	Request weekly reports from hotels on room block	Develop and finalize volunteer job functions and onsite needs.	*Submit Pre-Conference budget forecast*		Monitor Daily Activities					*Submit final financial report with Certification of Accuracy*	
		Review tax information to ensure IRS and international compliance VAT and GST	Register for PDF eXpress (optional)	Apply for grants for conference support	*Submit conference budget with written IEEE OU approval(s) for headquarter review*	*Establish conference bank account(s)*				*Organize and prepare for production of conference publications per Letter of Acquisition (LOA)*	Complete paper review process. Finalize technical program. Notify speakers.	Ship final program to conference site		Hold Post-Conference Wrap Up Meeting					*Submit Post-Conference forecast*	
		Contract conference management company, if applicable	Site selection and contract review, if applicable		*Submit Principles of Business Conduct Compliance Certificate and Conflict of Interest Disclosure Statement*	*Submit updated committee list*														

Request and obtain loan from OU, if needed

Initial, Pre-and Post Conference forecasts [Submit Pre- and Post- Conference forecasts by November 30th of each calendar year for accrual purposes.]

1099 & 1042 Schedule of Payments [No later than January 10th of each year for all payments made in the previous calendar year.]

Submit annual report on foreign bank accounts to IEEE Tax Dept. [No later than January 10th of each year for all payments made in the previous calendar year.]

Secure W-8 and/or W-9 forms for tax reporting

Promote CFP and exhibit prospectus at current year's conference, if applicable

Review and reconfirm hotel, meeting space and room block

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NOTE: This timeline is illustrative and for planning purposes only. Each conference plan and timing is unique. © IEEE 2019 All rights reserved

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IEEE MEETINGS, CONFERENCES & EVENTS

Timeline Key:
Financial Actions
Technical Program Actions
Conference Publications Actions
Boldfaced = Required