



Technical Meeting Handbook (TMH)

Revised October 2025

The IEEE Computer Society strives to offer the best possible meetings to advance current technology and computer engineering. Organizing outstanding meetings relies on the effort of willing volunteers like you and your committee members.

This handbook is a guide providing information on how to organize a meeting in conjunction with the policies and procedures of the IEEE and IEEE Computer Society. Policy statements are indicated in italics or referenced in the form of Web links. To maintain your technical meeting in good standing with the IEEE Computer Society and the Technical and Conference Activities Board, these policies must be followed.

On behalf of the IEEE Computer Society, we would like to thank you for your organizing efforts and wish you success in planning your meeting.

This handbook is organized by topic and features URL links to information that will assist Conference Organizers in preparing for a successful IEEE Computer Society Conference. Please keep in mind that this handbook is intended to provide basic guidelines for organizing an IEEE Computer Society-sponsored conference. Each conference will have an assigned IEEE Computer Society Conference Planner to be your direct contact throughout the conference sponsorship and planning process.

Policy and Procedures

Please review the IEEE-CS Policies and Procedures Manual Section 6.4 (TECHNICAL MEETINGS) that governs this document. Access the [Policies and Procedures manual](#).

Conference and Event Services

For conferences to operate smoothly, a successful collaboration with both new and returning conference organizers and the IEEE Computer Society professional conference event staff is most important. Let us work together to make your conference a success.

Foremost, the assigned IEEE Computer Society staff Conference Planner will assist the Conference General Chair and Conference Finance Chair through the IEEE Computer Society Conference Sponsorship Approval process.

Next, the Conference Planner will provide professional meeting planning services. The Conference Planner will assist the Conference General Chair with all the details of conference planning and the various conference services required for a successful conference.

- Site selection
- Virtual Services
- Skilled contract negotiation
- Hotel, venue, and vendor contracting
- Audiovisual production

- Social function planning
- Hotel room block and F&B management

General Questions Regarding Financial or Technical Sponsorship

- Please send any questions about financial sponsorship to conferences@computer.org
- For technical co-sponsorship, please send questions to tcsrequests@computer.org.

Find Your Conference Planner

Conference Planners are assigned by the Technical Committee, Technical Council, Consortia, and Task Force. To find your assigned Conference Planner, visit [TC Conference Planner Assignments](#)

Technical Communities and Councils (TCs)

IEEE CS Technical Communities (TCs) are networks of professionals with common interests in computer hardware, software, applications, and interdisciplinary fields. TCs directly influence society standards, publications, conferences, workshops, education, and chapter activities. They serve as the focal point for the society's activities within a technical discipline. Activities typically include organizing workshops, symposia, and technical sessions at IEEE CS conferences.

TCs make critical contributions to IEEE CS meetings. TCs initiate new meetings, foster, and support ongoing meetings. TC members typically serve on program and conference committees to ensure the technical quality of the meetings. In addition, for CS-Sponsored or Co-Sponsored meetings, the Sponsoring TC Chair or designate must be an ex officio voting member of the Conference Steering Committee.

The TC Chair coordinates all sponsored, co-sponsored, and technically co-sponsored conferences, symposia, and workshops. The Chair actively encourages the creation and organization of new conferences as well as ensures the success of existing conferences. The TC Chair is responsible for the overall administration of the technical committee. This includes providing technical direction and leadership. The Chair maintains the vitality of the committee by coordinating activities such as conferences, standards, newsletters, etc.

TC Chairs also serve an important role for endorsing conferences, reviewing and approving conference budgets that are sponsored by the technical committee, and reviewing technical quality of applications for technical co-sponsorship.

For more information and a list of all Technical Communities and Task Forces, please see the website: [Technical Communities](#)

IEEE Regions and Sections

The IEEE CS encourages conference organizers to cooperate with the IEEE Regions and Sections in planning a technical meeting; they can be particularly helpful in local arrangements. IEEE Regional Directors should receive information on, and invitations to, technical meetings taking place in their regions. Information on the Regional Directors is available from IEEE: [IEEE Regional World Map](#)

Sections should be invited to participate in IEEE CS technical meetings.

Conference Organizing Committee

The IEEE Computer Society is the premier source for information, inspiration, and collaboration in computer science and engineering. Connecting members worldwide, the Computer Society empowers the people who advance technology by delivering tools for individuals at all stages of their professional careers. Our trusted resources include international conferences.

Each instance of a conference is planned and executed under the direction of the Organizing Committee.

The following describe the common roles of the Conference Organizing Committee:

General and Conference Chairs

A Conference General Chair is responsible for all aspects of the conference and is accountable to the steering committee (if applicable) and financial sponsors. The General Chair provides hands-on tactical planning and running of the conference. All Financially Sponsored conferences are required to have both a General Chair and a Finance Chair. A topline list of responsibilities include (but are not limited to):

- Overseeing and coordination of the conference
- Selecting and/or approving conference location and venue
- Providing insight and approval on various conference items (contracts, platforms, budgets, etc.)
- Appointing additional committee chairs
- Completing a Conflict of Interest (COI) Form

Finance Chair and Treasurer

A Conference Finance Chair is responsible and accountable for the financial validity of the conference. A topline list of responsibilities include (but are not limited to):

- Prepares, monitors, and modifies Conference Budget as required within a timely manner
- Manages conference bank account
- Issues approved conference payments
- Maintains conference financial records & reports
- Working with IEEE Finance to close the conference within the nine-month required timetable
- Requests an audit if required by IEEE Policy
- Responsible for completing a Conflict of Interest (COI) Form

Program Chair

Responsible for creating a well-balanced and high-quality program presented at the conference. A Program Chair is not a required chair position but can enhance the conference's program. A topline list of responsibilities include (but are not limited to):

- Selecting and managing the program committee
- Planning and facilitating the technical program
- Managing the Call for Papers (CFP) through the selection and review of each paper
- Assisting in scheduling session meeting rooms

Publications Chair

Responsible for the coordination of all conference proceedings production:

- Works with publisher for production of the conference proceedings
- Communicates with authors regarding text preparation and deadlines
- Obtains signed IEEE Copyright from each author/speaker if not automatically collected during the paper submission and peer-review and acceptance process.
- Serves as the point of contact for all IEEE *Xplore*® submission-related inquiries before and after the conference.

Publicity Chair

Responsible for all aspects of promoting the conference

- Promotes the conference through placements in various IEEE publication calendars
- Promotes the conference through IEEE and non-IEEE publications and news media
- May also develop and manage social media applications

Registration Chair

Responsible for all aspects of conference registration

- Establishes conference registration procedures, cancellation policy and logistics
- Manages conference registration system
- Manages registration-management company
- Manages conference advance and onsite registration
- Manages registration types and credentials are in accordance with approved budget
- Collects registration income and provides reports to Conference Finance Chair
- Creates attendee name badges
- Creates and provides attendee registration reports for IEEE Computer Society

Exhibits Chair

Responsible for the conference exhibition coordination with assigned Conference Planner

- Coordinates exhibit floor space
- Coordinates Exhibitor logistics
- Collects Exhibitor registration and coordinates with Conference Registration Chair
- Coordinates on-site exhibits, exhibit service contractor and security
- Coordinates with assigned Conference Planner

Conference Titles and Naming Conventions

Rules and policies have been established regarding conference titles. Year over year consistency in naming the Conference is essential for reference, publications, and help in branding your event.

1. Whenever a technical conference is sponsored solely by an IEEE entity or entities, “IEEE” must be used in the title.
2. “International” may be used in the title of the conference only when the conference will reflect an international character to a significant degree. Ordinarily, this would require active participation of the technical program committee of members from at least two nations, and a reasonable expectation that the technical program will include a significant number of papers from at least one other nation.
3. The word “national” may not be used in the title of an IEEE-sponsored meeting.
4. After a conference has been approved with a given title, only that title may be used. The Vice President of the Technical & Conference Activities Board must approve subsequent title or subtitle changes.

Title format should follow this schema:

- Year (4 digits)
- IEEE (as applicable)
- Sequence Number (as applicable)
- International (if conference reflects a significant degree of international character)
- Remainder of Title
- Acronym

Examples

- 2016 IEEE Symposium on Computer Arithmetic (ARITH)
- 2017 IEEE International Conference on Bioinformatics and BioEngineering (BIBE)
- 2018 IEEE 31st International Symposium on Computer-Based Medical Systems (CBMS)
- 2019 IEEE International Conference on Parallel and Distributed Systems (ICPADS)
- 2020 IEEE International Conference on Software Architecture (ICSA)

Please note: Changing a conference title from past year over year naming convention may result in a break in the sequence in digital libraries and with indexing partners. It may also cause the loss of certain assigned identifiers (the ISSN).

Branding Requirements and Guidelines

To help identify IEEE conferences, IEEE Computer Society sponsored and co-sponsored conferences are required to use the IEEE Computer Society name, the IEEE Computer Society logo and the IEEE logo on the conference website, Call for Papers, conference materials, advanced and final programs.

Brand guidelines and logo information for IEEE Computer Society Sponsored conferences can be found here: [IEEE Computer Society Brand Guide](#)

IEEE Computer Society Sponsorship

IEEE Computer Society sponsors many of the computing world's premier technical conferences. Our nearly 200 conferences, workshops, and symposia provide cutting-edge content for all the technical fields of interest.

All types of sponsorship require endorsement through one or more of the IEEE Computer Society Technical Communities (TC) that broadly represent the range of technical topic areas. [Technical Communities](#)

The Computer Society offers three different sponsorship options.

Please note: Sponsorship applications should be submitted 12 months prior to the conference start date.

Financial Sponsorship

As a full financial sponsor, IEEE Computer Society accepts all financial and legal liability and owns all assets. Conference General and Finance chairs should complete the conference application 12 months prior to the conference date to allow time to obtain Technical Committee approvals and endorsements, create and obtain approval of the conference budget, to approve contracts and promote the conference. The full financially sponsored conference will be listed in the IEEE conference calendar as well as the IEEE Computer Society conference calendar.

For all returning conferences, please contact your assigned conference planner or conferences@computer.org as early as possible prior to the proposed conference start date.

For all NEW conferences, please contact conferences@computer.org as early as possible prior to the proposed conference start date.

Financial Co-Sponsorship

As a financial co-sponsor, IEEE Computer Society shares in the financial and legal liability and assets with another IEEE Society or nonprofit organization as outlined in a MOU (MEMORANDUM OF UNDERSTANDING). Advance loans, surpluses, and losses are shared in proportion to the sponsorship commitment.

For new conferences, IEEE Computer Society will need to be at least a 50% financial co-sponsor of the conference.

The Conference General and Finance chairs should complete the conference application 12 months prior to the conference date to allow time to obtain Technical Committee approvals and endorsements, create and obtain approval of the conference budget, to approve contracts and promote the conference. The full sponsored conference will be listed in the IEEE conference calendar. The co-sponsored conference will be listed in the IEEE Computer Society conference calendar.

Additional requirements for Financially Sponsored Conferences:

- The IEEE Computer Society name must be listed as sponsor
- The IEEE Computer Society Conference website must list the Technical Communities/Council (TC) and provide the TC link to the TC home page. [Technical Communities](#)
- The published Conference Proceedings must include a page with the description of the endorsing Technical Communities.

For more information, contact your assigned [conference planner](#) or email conferences@computer.org.

For all returning conferences, please contact conferences@computer.org as early as possible.

For all NEW conferences, please contact conferences@computer.org as early as possible.

Please note, IEEE CS policy states that in order to be considered for full financial or financial co-sponsorship, a conference must have more than fifty (50) attendees. Conferences that do not meet this minimum requirement will either be asked to co-locate/co-budget with another financially sponsored conference or apply for a technical co-sponsorship.

Technical Co-Sponsorship (TCS)

As a technical co-sponsor, IEEE Computer Society volunteers and members actively participate in the conference technical program committee, but the Computer Society accepts no financial or legal liability for the conference. The TCS conference can use the IEEE, IEEE Computer Society logos, and IEEE Computer Society Technical Community Logos to indicate technical sponsorship but may not use 'IEEE' in the conference name. In addition, the conference dates must not overlap IEEE conferences in the same subject area. The TCS conference will be listed in the IEEE Computer Society conference calendar.

Conferences will need to provide a Statement of Benefits signed by the appropriate TC's Chair and submit an IEEE Sponsorship Application. Both are required to be submitted at least 6 months from the conference start date. For more information, contact: tcsrequest@computer.org.

IEEE Computer Society Sponsorship Options

<https://www.computer.org/conferences/organize-a-conference/sponsorship-options>

IEEE Computer Society conference calendar: <https://www.computer.org/conferences/calendar>

IEEE website conference calendar: <https://www.ieee.org/>

Technical Co-Sponsorship Fees

IEEE Computer Society: There is a non-refundable US\$350 USD IEEE Computer Society Technical Co-Sponsorship Fee due before application review. For conferences returning for their 4th consecutive year of Technical Co-Sponsorship, the fee is US\$1,000 USD.

IEEE: There is also an IEEE Technical Co-Sponsorship fee of US\$1450, depending on if the conference has sponsorship with other IEEE Societies.

Post-conference: If accepted for technical co-sponsorship, IEEE also charges a US\$22/paper fee upon submission of content to IEEE *Xplore*®, depending on if the conference has sponsorship with other IEEE Societies.

For more information, contact: tcsrequest@computer.org.

Returning IEEE Computer Society Conferences Sponsorship

The IEEE Computer Society Conference Sponsorship Approval is a **Four-Step Process** that requires conference documentation to be completed and submitted by the Conference General Chair and Conference Finance Chair.

The Conference General Chair and Finance Chair should complete the conference application at least 12 months prior to the conference date to allow time to obtain Technical Committee approvals and endorsement.

The [assigned IEEE Computer Society Conference Planner](#) will assist the Conference General Chair and Conference Finance Chair through the IEEE Computer Society Conference Sponsorship Approval process.

For all returning conferences, please contact your assigned Conference Planner or contact conferences@computer.org as soon as possible when starting the planning process of the conference

Conference Sponsorship Approval Process

The completion of both Steps One and Two are required for the IEEE Computer Society Conference Sponsorship Approval.

1. Conference Application, TC Endorsement and COI's

The Conference General and Finance chairs should complete the conference application 12 months in advance of the conference to allow time to obtain Technical Committee approvals and endorsements, to approve contracts and promote the conference.

The IEEE Conference Application lets the Conference Organizers officially register the conference and request IEEE Conference Sponsorship approval. When the Conference Application is completed and submitted, a five-digit Conference Record number is generated for the conference. The Conference Record number is applied on all IEEE paperwork from the Conference application to Conference closing.

Per IEEE Policy, the IEEE Conference General Chair and Conference Finance Chair are separate roles, therefore all IEEE Computer Society conferences must provide information for both a Conference General Chair and Finance Chair within the Conference Application. The same person cannot be listed twice.

Submit [IEEE Conference Application](#)

From there, the conference application will be sent to the following individuals to approve, decline, or ask more questions based on the information given:

1. **Computer Society Endorsement** - the completed/submitted conference application is reviewed and the information sent to Computer Society Management for review and approval.
2. **Technical Committee (TC) Endorsement** – The Computer Society approval activates TC endorsement request to be sent to the TC Chair.
3. **Other Sponsor Endorsement** – After the TC Chair approves, the application will be sent to any additional sponsors (if applicable) for approval

Conflict of Interest (COI) - the Computer Society Conference General Chair and Finance Chair are responsible for coordinating the conference and for the financial validity of the conference. Both chairs are required to complete and submit the IEEE Conflict of Interest (COI). After the conference is completed, IEEE Finance will

require all conference closing information be submitted by the Conference General Chair and Finance Chair that were responsible for the conference.

Once the application is approved and the COI forms have been submitted and accepted, the Conference may move to Step Two of the Approval Process - Budget and Banking

2. Conference Budget and Banking

Managing the conference finances effectively is essential to the success of the conference. Below are the requirements for step two:

- All IEEE Computer Society conferences must have a final approved conference budget.
- All IEEE Computer Society conference budgets require final approval from the IEEE Computer Society and The TC Chair.
- All IEEE Computer Society conferences must open compliant bank account to receive conference revenue and pay conference expenses.
- All IEEE Computer Society conferences will be required to follow IEEE Finance conference closing guidelines after the conference is completed.

Conference Budget

Managing the conference finances effectively is essential to the success of the conference. As an IEEE Computer Society Financially Sponsored Conference, it is especially important for all IEEE Computer Society conferences to create the estimated budget that is as accurate as possible. **Please note:** IEEE Finance will require the actual final budget along with closing documents for conference closing.

The assigned Conference Planner will assist the Conference Finance Chair with the conference budget, budget review and budget approval. The Conference Finance Chair and Conference General Chair will receive the current approved Computer Society Conference Budget template from the assigned Conference Planner when Step One is completed and approved.

Budget Review Process

1. The assigned Conference Planner will email the current approved Computer Society budget template to the Conference Finance Chair when Step One is complete (IEEE Conference Application, TC Endorsement and COI's)
2. Conference Finance Chair completes Conference Budget (v1.0) using the Computer Society budget template and submits it to the assigned Conference Planner
3. Conference Planner reviews the budget. If necessary, the Conference Planner may request additional information or clarification on budget line items. The Conference Finance Chair will need to submit additional information to the Conference Planner.
4. The budget will then be sent to the conference's endorsing TC Chair(s) and co-sponsors (if applicable) for approval. Please allow up to five business days for TC Approval
5. For budgets with a total expense or income of \$500K USD or greater or if the conference closed in a deficit in the past 2 years, the Technical Meeting Request Committee (TMRC) must review the conference budget for approval, please allow 7-10 business days for TMRC approval. **(MOTION PASSED October 2025)**
6. When the Budget Review is complete and all approvals secured, the Conference Planner will notify the Conference Finance Chair.

Please note: an approved conference budget is due 6 months prior to the conference start date.

Conference Administrative Fees

Per Policy, all IEEE CS Sponsored or Co-Sponsored Conferences must budget for a Computer Society administration fee of 20% of all expenses (minus grants/donations) or a minimum fee of US\$5,000, whichever is greater. The fee is proportionate to the percentage of IEEE CS sponsorship.

Administration Fee – Large Conferences

For conference budgets approved on or after 1 July 2018 and all conferences occurring in 2019 and later, where the IEEE Computer Society portion of budgeted or actual expenses are US\$250K or greater, the IEEE CS admin fee is calculated on a sliding scale starting at 20% for the first US\$250K, and reduced by 2.0% for each additional US\$250K of expenses, with a minimum of 6%. The admin fee is reinvested in the IEEE CS and funds the following: actual costs of conference program, and other non-surplus-generating cost centers (e.g., Awards, Grants, Standards, Chapter and Regional Activities, etc.).

NOTE: The 20% CS Administration Fee is roughly equivalent to the IEEE requirement of a 20% budgeted surplus.

Surplus Reinvestment for Qualifying Conferences (MOTION PASSED February 2021)

Computer Society conferences that financially close within (9) nine months of the conference end date (this excludes any financial steps not under control of the conference (e.g., completion of IEEE audit) are eligible for a conference surplus reinvestment in the conference two years out.

For qualifying conferences, 33% of the Computer Society's portion of conference surplus will be made available by the Computer Society to be reinvested in the conference two years out (year x + 2). Reinvestment funds are available for a single conference year and may not be spread across multiple future instances. After a conference (year x) is financially closed and the conference surplus is known, staff will let the General/Finance Chair of the conference two years out (year x+2) know the amount available as "IEEE CS reinvestment" to the conference budget. For example, reinvestment funds from ABC 2020 will be applied to ABC 2022. The reinvestment funds will be applied as a reduction of the administrative fee in the conference budget. If the reinvestment amount is larger than the conference administrative fee, the remaining balance goes into the Computer Society general fund.

NOTE: The conference surplus is divided evenly between the conference, sponsoring Technical Committee(s), and the Computer Society as long as the conference closes within 9 months. 33% of the conference surplus is allocated to the sponsoring TC's reserves if the conference closes within 9 months. The remaining 33% of the surplus goes into the Computer Society's general fund.

In the case of a conference deficit, the deficit amount is divided between the sponsoring Technical Committee(s) and the Computer Society regardless of when the conference closes. In the instance of a deficit, 66% will be covered by the sponsoring Technical Committee(s) reserves and 33% will be covered by the Computer Society.

Conference Contingency

Renewing conferences must budget for 10% contingency. Best practice recommends increased registration fees and a 20% contingency for conferences moving from IEEE Regions 1 – 6 to 7 – 10 (to account for, VAT or other

consumption tax, conference space cost, increased committee travel, and head-count-based attendee food and beverage guarantees negotiated in many international hotel / venue contracts.)

NOTE: New conferences must budget for a 15% contingency (for unplanned expenses, etc.) into the conference budget. The budget will be reviewed for approval by the Technical Meeting Request Committee (TMRC).

NOTE: The 20% CS Administration Fee is roughly equivalent to the IEEE policy requirement of a 20% budgeted surplus.

Conference Watch List (Deficit)

The IEEE CS assumes sponsored conferences' financial risk. As a result, conferences operating in a deficit have a negative impact on the conference as well as the overall organization. Conferences closing in a deficit will be placed on a "Watch List" and will be carefully monitored to mitigate or eliminate further financial risk/liability. These conferences will be subject to financial management and assistance by TMRC, greater TC program involvement, organizational restructuring assistance, etc. Conferences can remain on the Watch List for no longer than two cycles; after that, if the conference cannot demonstrate evidence of strong improvement, sponsorship will be revoked. The TMRC, with input from the TC and staff, will make the determination. Conferences that close as non-compliant will be added to the TMRC watch list.

- A. If the conference was moved to the Watch List due to a closing deficit, the TC will provide oversight for the planning and budgeting of the Watch List conference.
- B. Watch List conferences are required to use the CS Budget by Appointment process, and the budgeted contingency will be increased to 15% (from 10%). Staff support is also required for all vendor RFPs and contract negotiations and execution.
- C. The Conference Chair must submit the budget for review no later than 6 months prior to the start date of the conference, or sponsorship will not be approved.
- D. The official IEEE Computer Society closing of the conference must be completed within 9 months of the conference end date. Per IEEE policy if using an IEEE Concentration Banking, the bank account will be closed no later than 6 months after the conclusion of a conference.
- E. Failure to adhere to any of the required procedures will result in revocation of sponsorship immediately upon written notification to the conference's Steering Committee Chair or General Chair(s) without further due process.
- F. Conferences unable to move off the Watch List may co-locate and co-budget with a more successful IEEE conference.

Conference Bank Accounts

When Step One is completed and approved, the assigned Conference Planner will assist the Conference Finance Chair with IEEE banking requirements and information.

As the Conference Financial Sponsor, the IEEE Computer Society accepts all financial and legal liability and owns all assets. Since IEEE will be assuming some or all-financial liability for the conference, the conference must disclose all conference bank accounts in order to obtain IEEE Computer Society sponsorship approval.

There are four different types of Conference Bank Account Options that are available to organizers:

- NextGen Banking with a CB (Concentration Banking) Account
- Local Bank Account*
- Banking with a University or Non-Profit Organization (Fiscal MOU Required)
- Banking with a Third Party Professional Conference Organization (PCO) (Contract Required)

NextGen Banking is a streamlined approach that provides a one-stop resource for your banking needs with integrated self-service options providing greater flexibility and ease of use. Enjoy features for banking transactions such as self-service tools and greater visibility into finances. NextGen Banking will be replacing Concentration Banking/CBRS. For more information, visit [NextGen Banking Central](#).

The Assigned Meeting Planner will assist the organizers in establishing a NextGen CB Bank Account.

*If pursuing a local account, all IEEE Computer Society conference bank accounts must have the signatures of at least two volunteers and the IEEE Senior Director of Financial Services, except as prohibited under local government regulations, in which case a monthly detailed bank account statement must be provided to the IEEE Computer Society. All local bank accounts must be approved by IEEE Executive Management.

3. Conference Contracts

As the Conference Financial Sponsor, the IEEE Computer Society accepts all financial and legal liability and owns all assets of the conference. Since IEEE will be assuming some or all-financial liability for the conference, an IEEE-executed contract is required between IEEE and the vendor providing services to the conference. IEEE conference contracts are signed by authorized IEEE Executive Management members.

Per policy, IEEE will not honor or accept contracts that are signed by individuals who are not legally authorized to do so by IEEE. If a conference chooses not to abide by this policy, they will be considered non-compliant.

If a Conference Organizer signs a contract for an IEEE Computer Society conference, the individual or the individual's affiliated organization will be responsible for the contract legally and financially.

Conference services that will require a contract are Conference Registration, Virtual Platform service, Audiovisual, Venue or Hotel Meeting Space, Hotel Rooms, Services for Social Functions, Exhibitor Services, Financial Management and Conference Management.

The assigned Conference Planner will prepare the vendor information for the IEEE contract execution process. IEEE Computer Society conference contracts must be submitted to IEEE Legal and Contract departments for review, approval, and execution by the Conference Planner. "Execution" is the signing of the contract by authorized IEEE Executive Management members.

The IEEE Contract execution process can be lengthy - due to the number of reviews and approvals that are required. It is important to start the process as soon as possible in order to avoid any delays.

IEEE Contract Execution Process

1. The assigned IEEE CS Conference Planner and the Vendor will input the required details into the IEEE contract template and negotiate the terms in the best interest of the Conference, IEEE, and the Vendor.

2. Conference Planner reviews and confirms the contract with the Conference General Chair.
3. Once the confirmation has been received via email from the Conference General Chair, the Conference Planner submits the contract to IEEE Legal Department for review and approval.
4. Once the Conference Planner receives approval from the IEEE Legal Department, including making the necessary changes to the contract, the Conference Planner reviews and confirms the documents with the Vendor again.
5. Once the Conference Planner receives approval from both Legal and the Conference General Chair, the Conference Planner reviews and confirms the contract with the Computer Society Management.
6. Once the Conference Planner receives approval from Computer Society Management, the Conference Planner submits the contract to IEEE Contract Department for review, approval, and execution.
7. Authorized IEEE Executive Management members will sign the IEEE conference contracts.
8. IEEE uses DocuSign for all contracts; an email will be sent to the Vendor for the Vendor signature once the IEEE contract process is completed.

Please note: the IEEE contract execution process requires that each conference complete the entire IEEE Computer Society Conference Sponsorship Approval Process (*Steps One & Two*) before the IEEE contract execution process can take place.

Additional Services to Consider

Registration Services

As part of the budgeting process, the conference registration system will need to be identified. The IEEE Computer Society recommends the internal registration vendor *Conference Registration Services* (CRS). CRS provides high-quality registration services with a first-rate customer experience. Utilizing Cvent, the CRS team will work directly with Conference Organizers to manage all aspects of registration for conferences. This includes:

- 24/7 access to standard and custom reports
- customer service for conference registrants
- automatic IEEE membership validation
- final report in line with requirements for conference closing
- full support for conference organizers regarding registration (troubleshooting, assistance, special requests etc.
- automatic deposits into conference bank account (must be U.S.-based)
- templated visa letters sent to registrants after payment verification (restrictions will apply)
- templated letter of attendance sent to registration after conference (restrictions will apply)
- Concentration Banking (CB) account will be required.

If the Conference Organizers wish to use a different Conference Registration platform, or are using a local bank account, the assigned Conference Planner can provide additional information.

Please note, CRS services may not be available in all countries. Please contact your assigned conference planner and registration@computer.org for additional information.

Conference Proceedings

Conference proceedings associated with a financially sponsored IEEE Computer Society conference should be submitted to IEEE *Xplore*®. This includes co-budgeted conferences, workshops, etc. If the content is accepted into IEEE *Xplore*® it is made available to IEEE indexing partners. These indexing partners make the final decision on what content they wish to include.

The IEEE Computer Society recommends working with [Conference Publishing Services \(CPS\)](#), an internal Computer Society publishing group. CPS produces high-quality conference publications in print, digital and online products. Services include:

- Completion of necessary IEEE forms, including the Publication Form
- 24/7 access to your conference content during the production process
- a dedicated CPS editor
- file collection and validation
- copyright collection
- submission to the IEEE *Xplore*® Digital Library

Conferences can receive a quote by going to [Conference Publishing Services](#) or contacting cps@computer.org.

If a conference chooses to use another vendor or self-publish, Conference Organizers will need to coordinate submission of content to IEEE *Xplore*®.

No conference, workshop, event, or publisher can guarantee inclusion in IEEE *Xplore*® or indexing via IEEE indexing partners. All conference content is subject to a possible quality review process performed by IEEE volunteers.

Conference Journal Partnerships

In accordance with IEEE Policy 6.3.1 (<https://www.ieee.org/publications/rights/copyright-policy.html>) and IEEE PSPB policy 8.1.4.B (<https://pspb.ieee.org/images/files/files/opsmanual.pdf>):

- Conferences with 100% IEEE Computer Society sponsorship may only partner with periodicals which are also 100% sponsored by the IEEE Computer Society.
- Conferences which are co-sponsored by the IEEE Computer Society may only partner with IEEE Computer Society periodicals or pre-approved periodicals published and under copyright by the conference co-sponsor.
- Any proposal for IEEE Computer Society financially sponsored or co-sponsored conferences to partner with a journal or Board before an agreement is executed. Agreements of this type include, but are not limited to:
- An agreement between a conference and a periodical where expanded versions of conference papers are pre-accepted for publication in that periodical.
- An agreement where conference papers are diverted from the conference proceedings to publication in a periodical.

This policy applies to all conference co-budgeted event publications, such as workshop proceedings, where IEEE Computer Society is a financial sponsor.

This policy pertains to agreements between conferences and publications and does not impact individual authors' rights and responsibilities as outlined in the IEEE copyright and other documentation. Individual authors have the right to expand upon their research and submit to any journal/periodical of their choosing, conforming with current IEEE copyright policies.

Any proposed exceptions to this policy must be reviewed by the IEEE Computer Society Technical & Conference Activities Board for approval.

Conference Marketing

Promoting your conference is an important part of a successful event but knowing what promotional activities will bring the most impact is not always clear. IEEE Computer Staff can provide a promotional marketing tool kit, to provide efficient and effective ideas and resources to help you and your team expand the reach of your conference. General Marketing Services are available for all IEEE Computer Society conferences. Marketing support and services information can be found here: [Conference Marketing Support | IEEE Computer Society](#)

Additional Conference Information

Copyrights

If a conference or event is 100% financially sponsored by the IEEE CS, or the IEEE CS and another IEEE society, IEEE must hold the copyright to the proceedings. Conferences with less than full (100%) IEEE financial sponsorship are encouraged to have IEEE hold the copyright. In these instances, copyright of the conference proceedings is held by IEEE or another financial co-sponsor, as agreed upon by the financial sponsoring entities.

Conference Intellectual Property

Peer-reviewed papers presented at IEEE Computer Society-sponsored conferences are required to be submitted for possible inclusion in the Computer Society Digital Library (CSDL) and the IEEE Electronic Library, IEEE *Xplore*®. For conferences without peer-reviewed IP in IEEE *Xplore*®, a fee may be instituted to cover lack of IP revenues.

IRS, VAT, GST Tax Information

In many instances, applicable taxes, VAT/GST/etc. must be collected on conference income. Please visit the [IEEE.org website](http://IEEE.org/website) for detailed information.

Conference Insurance

The Office of Risk and Insurance Management Services (ORIMS) is part of the IEEE Financial Services Department within IEEE Finance and Administration Organization. Information for IEEE Computer Society Sponsored conferences can be found here: [IEEE Risk and Insurance Management Services](#)

Step Four - Conference Closing

IEEE Computer Society Staff will assist with the final stages of closing reports and all necessary paperwork. Upon completion of the conference IEEE Computer Society Staff will introduce conference organizers to their assigned IEEE Financial Analyst who will complete the closing process.

There are a number of required items that each conference needs to complete in a timely manner in order to officially close a conference. Below are the items that need to be completed and submitted to the IEEE CS Financial Analyst:

1. Final Financial Report
 - a. Consists of filling out the “Actual” columns in the CS-approved conference budget
2. Schedule of 1099 and/or 1042 tax payments (For US-based conferences or US-based individuals receiving payments only)
3. List of Meeting Attendees
4. Proof of Bank Closure – based on the type of banking account the conference has
 - a. NextGen Banking/CB Account: Your financial analyst can provide the proof of the account closure
 - b. Local Bank account: The final bank statement for the conference showing a zero balance.
 - c. Third-Party Manager & PCO accounts: A letter from the Third Party or PCO stating that all funds related to the conference have been sent to the appropriate financial sponsors as per the sponsorship MOU and no funds related to the conference are left in the account.
5. Certificate of Accuracy (COA)
 - a. The General Chair and Finance Chair (Treasurer) must sign the COA.
6. Audit of Financial Records (if applicable):

Below is a general timeline of when these required items should be completed and sent to the Financial Analyst:

No later than 6 months after conference end date

- Repay loans to financial sponsors (if applicable)
- Ensure all major bills to vendors (Hotel, AV, Venue, Registration, CPS, etc.) are fully paid
- Ensure all honorariums or awards payments to individuals
- Provide final list of attendees
- Calculate surplus funds and assets to financial sponsors
- Close all bank accounts related to the event and provide proof of bank closure

Shortly after the conference ends, but no later than 9 Months after the Conference End Date

- Submit schedule of tax payments (if applicable) to report taxable payments to individuals (for honorariums or awards)
- Complete and submit the final financial report based on actual income and expenses received

No later than 9 months after conference end date

- Finalize all VAT documentation and approvals (if applicable)
- Sign and submit Certificate of Accuracy
- Send all audit related materials to IEEE (if applicable)