

I&M Society

Conferences Management Guidelines

This document is for the use of Conference Organizers interested in obtaining sponsorship by the Instrumentation & Measurement Society (IMS) for their events. It provides the guidelines, responsibilities and policies, including fees, for managing IMS Conferences, Symposia and Workshops and obtaining IMS support. The document is organized as follows and the index is also an useful checklist of the steps to follow:

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Conference Sponsorship Request Schedule

Conference Closing Schedule

A comprehensive source of current data on setting up, running and closing out a conference can be found on the IEEE Website http://www.ieee.org/conferences_events/conferences/organizers/index.html Useful documents include:

- Starting a New Conference:
http://www.ieee.org/conferences_events/conferences/organizers/starting_new_conference.html
- Setting up an Annual Conference:
http://www.ieee.org/conferences_events/conferences/organizers/setting_up_annual_conference.html
- Quick Links to Required forms:
http://www.ieee.org/conferences_events/conferences/organizers/conference_organizer_quick_links.html
- IEEE Conference Application:
http://www.ieee.org/conferences_events/conferences/organizers/conference_application_form.html
- Conference Sponsorship
http://www.ieee.org/conferences_events/conferences/organizers/conference_sponsorship.html
- IEEE Policies 2015
http://www.ieee.org/documents/ieee_policies.pdf
- Checklist and timeline
http://www.ieee.org/conferences_events/conferences/organizers/high_level_conference_timeline.pdf

1. CATEGORIES OF SUPPORT (THREE OPTIONS: Technical, Financial, & Sole)

The IMS involvement can provide three different levels of support, as outlined below. For general IEEE definitions and policies, please refer to:

http://www.ieee.org/conferences_events/conferences/organizers/conference_sponsorship.html

and

http://www.ieee.org/documents/ieee_policies.pdf.

1.1 Technical Co-Sponsorship

Technical Co-Sponsorship is available for events financially sponsored by Non-profit Organizations. Technical Co-Sponsorship requires direct and substantial involvement by the IMS in the organization of the Conference technical program. Technically co-sponsored Conferences must include IMS members in the technical committees in order to contribute in managing the Call for Paper, the technical program and the review process. In addition, the IEEE IMS logo must be included in all event publications and announcements.

If the Conference does not request publication in IEEE Xplore, a fee of \$1000 is due to IMS.

If IMS is the only IEEE sponsoring Organizational Unit (OU), technically co-sponsored Conferences will be requested to pay fees to IEEE IMS (\$1,000 paid before compiling the Conference Publication form –see later- plus \$15/paper sent to IEEE Xplore®). If there are more IEEE sponsoring OUs, only the related percentage is due to IMS. Note that this fee is not due for sole sponsorship or financial co-sponsoring.

If IMS is the only IEEE Organizational Unit and the event has never been supported before by IMS, an additional fee of \$1,000 is due to IEEE IMS to cover the organizational costs related to establish for the first time the Technical sponsorship.

The relationship between sponsoring organizations must be explicitly defined in a Memorandum of Understanding (MoU). Normally, financial Co-Sponsorship is requested for technical co-sponsored events, where technical co-sponsorship has given very good results in terms of quality of the Conference Publications, organization of the conference and satisfaction of attendees.

1.1.1 Benefits and Constraints

The main benefit in technical co-sponsorship is to share with IMS members knowledge in the field of instrumentation and measurements. Other benefits are:

- be included in the IEEE Conference Search tool;
- be encouraged and supported to participate in the IEEE Conference Publications Program (CPP): the primary objective of the CPP is to include the Conference papers in IEEE Xplore® for the widest dissemination within the technical community;
- be included in the IMS website;
- use IMS and IEEE logos to attract qualified attendees;
- be listed in the IEEE IMS Magazine pages.

Other benefits can be specified in the MoU.

The Conference Organizers will:

- reduce registration rate for IEEE members;
- provide extra registration rate discount for IEEE-IMS members; the registration fees for IMS members should be not higher than for members of the other sponsoring Organizations
- include IMS members in the technical committee and comply basic requirements of the review process
- be available to distribute IMS items (e.g. other Call for papers) to the Conference attendees
- be available to promote IEEE and IMS activities and student participation, if applicable
- be available to provide information to IMS about the Conference (see Schedules, ADDENDUM section)

The official language of the Conference shall be English, and all papers shall be written, presented and discussed in English. Other requirements can be specified in the MoU.

1.2 Financial Co-Sponsorship

Financial Co-Sponsorship indicates a financial shared involvement between the IMS and other entities, along with a shared and significant involvement in the technical and administrative aspects of the conference. Other co-sponsors could be IEEE Organizational Unit(s) (societies, sections, chapters, etc.) and/or other Non-profit non-IEEE organizations. The relationship between sponsoring organizations must be explicitly defined in a Memorandum of Understanding (MoU).

Co-sponsored Conferences must include the IEEE IMS logo in all their publications and announcements. The term “IEEE” shall be used in the names of co-sponsored conferences where IEEE is at least a 50% financial sponsor (in total for all IEEE co-sponsors); it shall not be used if IEEE is less than a 25% financial sponsor; otherwise, it is recommended but not required.

1.2.1 Benefits and Constraints

In addition to the benefits and requirements described for technical co-sponsorship, other benefits include:

- No fees are due to IMS for paper submission to IEEE Xplore®
 - IMS knowledge and experience in budget control according to IEEE policies
 - Special advertising on IMS website (e.g. rotating banner on the web page) and in the IMS magazine;
- Other benefits can be specified in the MoU.

Besides the constraints described for technical co-sponsorship, the Conference Organizers will:

- plan a budget with an expected surplus of at least 20% of the expected expenses. The budget must be approved by the IEEE IMS Vice President for Conferences prior to the financial co-sponsorship approval
- be available to provide detailed information regarding the venue layout, room accommodations and other facilities
- organize monthly status meetings among Chairs, starting from at least eight months in advance to the Conference date. The minutes of the meeting shall be provided to IMS.

Other requirements can be specified in the MoU.

1.3 Sole Sponsorship

Sole sponsorship approval indicates full and sole IMS involvement in the Conference, with IMS accepting complete responsibility for the technical, financial, and administrative aspects of the conference. Solely sponsored Conferences are strongly encouraged to have a Board of Directors or an operative Steering Committee to ensure the application of IMS guidelines and best practices. The review process indicated in section 2.2.6 is mandatory.

Such Conferences must include the IEEE IMS logo in all Conference publications and announcements and must follow IMS guidelines for the review process. The term “IEEE” shall be used in the names of solely sponsored conferences. Please refer to the following list of most significant IEEE IMS solely sponsored conferences:

- The IEEE International Instrumentation and Measurement Technology Conference (I²MTC)
- Sensor Application Symposium (SAS)
- International Symposium on Medical Measurements and Applications (MeMeA)
- International IEEE Symposium on Precision Clock Synchronization for Measurement, Control and Communication (ISPCS)
- IEEE International Workshop on Applied Measurements for Power Systems (AMPS)

2. TECHNICAL CO-SPONSORSHIP PROCESS

This section shows the guidelines for requesting the IMS technical co-sponsorship. Please, refer to section one for benefits and constraints of each category of support. For more information, see the IEEE website at: http://www.ieee.org/conferences_events/conferences/organizers/index.html .

2.1 Sponsorship request

Step by step procedure:

2.1.1 Motivation and Preliminary check

- Only non-profit organizations can obtain the IEEE technical or financial sponsorship.
- The conference must fall within the area of expertise and interest of IEEE IMS (see IEEE IMS website <http://ieee.ims.org> section Technical Committees and section Conferences).
- Ensure that there are not other IMS sponsored events with the same topics, at the same time and/or in the same region. If there are, contact the Chairs to maximize synergy. See also “concluded conferences” section, because many Conferences repeat every year or every two years in the same period.

2.1.2 Contact IMS Vice-President for Conferences

After preliminary checks, it is important to contact as soon as possible, not later than 12 months before the event, the IMS Vice President for Conferences and the appropriate IMS Technical Committee in order to include the most qualified IMS members.

Please include the following information:

- The compiled Conference Sponsorship Request Schedule (see ADDENDUM)
- draft Call for Papers
- eventual IMS Technical Committees involved (note in the Conference Sponsorship Request Schedule)
- samples of brochures, advertisements or other pertinent material
- special requirements for the Memorandum of Outstanding (MoU)

The IMS Vice President for Conferences will contact you with evaluation regarding the sponsorship. Contact information about IMS Vice President for Conferences and Technical Committees can be found in the IEEE IMS website at <http://ieee-ims.org/>.

2.1.3 Submit the Conference Application Form and pay eventual fees

After receiving approval from the IMS Vice President for Conferences, proceed to complete the online Conference Application Form at http://www.ieee.org/conferences_events/conferences/organizers/conference_application_form.html. This document establishes the name of the conference, the date and venue and the principal points of contact. No other planning and approvals can be initiated, including contract review and execution, until the online Conference Application Form is completed by the Conference General Chair (or Co-Chairs), or the Conference Agent of Record. The Conference application form should be submitted as soon as possible, not later than 12 months before the event. Send a copy of the submitted Conference application form and the ID number assigned to the Conference to the IMS Vice President for Conferences.

IMS Fee Policy:

- If the Conference does not request publication in IEEE Xplore, a fee of \$1000 is due to IMS.
- If IMS is the only IEEE sponsoring Organizational Unit (OU), technically co-sponsored Conferences must pay fees to IEEE of \$1,000 paid plus \$15/paper sent to IEEE Xplore®. If there are more IEEE sponsoring OUs, only the related percentage is due to IMS. If IMS is the only IEEE Organizational Unit and the event has not been supported before by IMS, an additional fee of \$1,000 is due to IEEE IMS to cover the organizational costs.
- Should the technically co-sponsored conference not publish in Xplore, a fee of \$1000 is due to IEEE.

The MoU will be automatically generated and all fees are requested before the signing of the MoU, with the exception of the \$1,000 USD plus \$15 per paper that is requested within ten days from the last day of the Conference.

2.1.4 Check and approve the Memorandum of Understanding (MoU)

The MoU, Memorandum of Understanding is generated automatically using the sponsor information you entered in the IEEE Conference Application.

See http://www.ieee.org/conferences_events/conferences/organizers/memorandum_of_understanding.html and http://www.ieee.org/conferences_events/conferences/organizers/icx.html for more details.

The MoU includes basic and technical information about the conference:

- the involved parties and the role of each party;
- the name of the event;
- the duration of the MoU and how the MoU can be terminated;
- compliance with sponsoring entity's organization policies;
- contact information of signing parties;
- each sponsor's direct and substantial involvement in developing the technical program;
- the paper review process;
- ownership of the conference name and other intellectual property (not including the Conference, Publication copyright);
- whether this conference will be producing a Conference Publication;
- ownership of the Conference Publication copyright;
- if the conference proceedings will be included in the IEEE Conference Publication Program (CPP), also requesting publication of conference proceedings in IEEE Xplore®;
- assignment of conference management and other administrative responsibilities to the appropriate organizational unit;
- General Conference management accountabilities such as assignment of Chairs;
- if the conference has an associated exhibition;
- guidelines for using the IEEE Master Brand.

IEEE sends each of the sponsors a link to an online MoU form. The MoU must be approved by all the Sponsoring (technical and financial) parties. Note that IMS Vice President for Conferences will not approve the MoU if he/she has not timely received the correct information about the event.

2.1.5 Submit the Conference Publication Form for submission to IEEE Xplore®

IEEE co-sponsored Conferences are encouraged to participate in the IEEE Conference Publications Program (CPP). The primary objective of the CPP is to include the papers in IEEE Xplore® for the widest dissemination within the technical community.

IMS strongly encourages IEEE Xplore submission of regular papers. In order to favor industrial attendance, IMS suggests organizing the event with possibility of presentations of work-in-progress and state-of-the-art without submission of these works to IEEE Xplore.

However, the publication of the conference proceedings in IEEE Xplore® is not guaranteed by the IEEE co-sponsorship. It will be ensured only after a positive ex-post review of the paper quality performed under the responsibility of IEEE. If the overall content of the proceedings papers is considered below the IEEE standard of quality, they will not be included in IEEE Xplore®.

The Conference Publication form should be filled out online at http://www.ieee.org/conferences_events/conferences/organizers/conference_pub_form.html as soon as possible, it is encouraged that this form be filled out 12 to 15 months (no later than 9 months) before the Conference. The Conference Publication Form is your request for approval to submit your conference

papers to the CPP and the IEEE Xplore® Digital Library. The Letter of Acquisition (LoA), is sent to the Conference Chairs after the Conference Publications Form is received and approved by IEEE Conference Operations. This LoA should be read, approved and downloaded immediately. This LoA will be used for Conference proceeding submission to IEEE Xplore®. Determine if Non-Presented Papers will be pulled from submission to IEEE Xplore®. For more information about the handling of Non-Presented papers, see Developing the Final Program, available at http://www.ieee.org/conferences_events/conferences/organizers/pubs/final_program.html.

More detailed information can be found in the IEEE website Publishing Conference Papers at http://www.ieee.org/conferences_events/conferences/organizers/publishing_conference_papers.html.

Fee policy is detailed in section 2.1.3 Submit the Conference Application Form and pay eventual fees.

2.1.6 Register for Electronic IEEE Copyright Form (eCF) if Proceedings are acquired by IEEE

For technically co-sponsored Conferences, the organizers have the option of assigning ownership of the publications to IEEE or providing them on a non-exclusive basis. If IEEE is the copyright holder, ensure that the IEEE Copyright Form (electronic Copyright form available at http://www.ieee.org/publications_standards/publications/rights/copyrightmain.html) has been submitted with each paper to be published. The copyright form is also made available electronically through EDAS. Authors who are not authorized to sign a copyright transfer form, should download the paper version of a copyright transfer form, fill it in, and ask an authorized person to sign it. If authors would like to post their papers electronically on any web site, any ftp site, or any other electronic dissemination technique, they must include the IEEE Copyright notice on the initial screen displaying the IEEE-copyrighted material. Additional information is available here:

http://www.ieee.org/publications_standards/publications/rights/paperversionpolicy.html

2.1.7 Sign the Letter of Acquisition

The Letter of Acquisition (LoA), which is downloaded by the Conference Chairs after the Conference Publications Form is received and approved by IEEE Conference Operations, should be read and approved. The LoA provides the information needed to submit the conference proceeding to IEEE. The Technical Program Committee should ensure that authors receive proper instructions for final paper submission, ensuring a complete adherence to the requirements outlined in the Letter of Acquisition. Please note that The LoA does not guarantee that your conference technical papers will be published in IEEE Xplore. IEEE can withhold publishing of conference proceedings that do not meet the IEEE quality standards. More details about LoA are available at http://www.ieee.org/conferences_events/conferences/organizers/letter_of_acquisition.html.

2.2 Managing the Conference

Every Conference has its own scientific community and its own history. Technical co-sponsorship involves incorporating the guidelines and policies of IEEE and of IMS to the conference and, for this reason, IMS members shall be present in the Conference Committees. This section describes the guidelines to manage the Conference according to the IEEE policies and to the IMS policies; mandatory requirements are underlined. Suggestions in sections concerning the Call for Papers and the submission of Conference Proceedings to IEEE Xplore are strongly recommended for conferences seeking Technical co-sponsorship.

2.2.1 The Call for Papers

The Call for Papers should clearly indicate:

- The venue and the dates of the event
- The scope and the topics of the conference, in order to avoid papers out of scope
- The Sponsors

- The type of submitted paper (e.g. extended abstract, full paper). IMS strongly supports full paper submission
- The deadlines for paper submission and the dates for notification and for registration
- The Conference Chair and relevant contact information

Other information can be reported in the Call for Papers or in the Author instructions of the website. The Call for Papers should not be misleading, for instance promising inclusion in IEEE Xplore or indexing for accepted papers. An example of an appropriate Call for Papers can be found at I²MTC website, the IMS flagship Conference.

2.2.2 The website and advertising

The website should clearly report all the organizing and technical Committees and detailed author instructions. The Call for Papers and the website should report the following information:

- The complete name of the event, the edition, dates and place (city) ,
- General and Technical Chairs, name and logo of Sponsors and of Technical Sponsors,
- Aim of the Conference, Topics of the Conference, eventual other connected events,
- Type of Submission allowed (papers, Work-in-progress) and important dates of submission, notification, final paper due. Characteristics of submission (i.e. extended abstract or full paper, typical and maximum length). IMS encourages full paper submission (4-5 pages, max.6 pages).
- The review process, indicating major and/or minor revisions could be required and the final date of acceptance or rejection. IMS strongly supports the full review process, in which the final published manuscript, is peer reviewed.
- Rules for paper publication (accepted, covered by a proper registration) in the Conference Proceedings
- Rules for paper submission to Xplore (e.g. accepted, covered by a proper registration and presented at the Conference). Please be sure to clearly illustrate the policy about no-show papers, that is if non-presented papers will be pulled from submission to IEEE Xplore®.
- List wards with aim, amount, due date for nominations
- Possibility, if applicable, to submit a technically extended version of the published paper, with new original content, to IEEE Transactions on Instrumentation and Measurement
- Fees for registration, with reduced registration rate for IEEE members, and extra registration rate discount for IEEE-IMS members; the registration fees for IMS members should be not higher than for members of the other sponsoring Organizations
- Information on hotel accommodation, including room rates and contact information

Advertising is managed as a cooperation between the event and IEEE. The Conference shall allow IEEE IMS to promote membership and events at the Conference. IEEE IMS promotes Conferences by including listings on its website; links are also published on the IMS website for those Conferences that are co-sponsored or technically co-sponsored. Also, information about the Conference is provided in the I&M Magazine. More information about promoting an IEEE co-sponsored event can be found at http://www.ieee.org/conferences_events/conferences/organizers/publicizing_conference.html

To send an announcement to the entire IMS membership, the Conference Organizers can use the IEEE Notice System at <http://www.ieee.org/organizations/vols/e-notice/> . Once the notice is submitted, the IMS Vice President of Conferences will be contacted for approval.

False advertising shall be carefully avoided.

Be sure to clearly illustrate in the author instruction the no-show policy, that is if the paper must be presented at the Conference in order to be submitted to the IEEE Xplore.

IMS, in order to clearly avoid a pay-to-publish/no-show business model in their co-sponsored events, strongly recommends declaring that “papers accepted, covered by a full registration and presented at the Conference will be submitted to IEEE Xplore for publication”.

2.2.3 Exhibits

Some Conferences include exhibits. IMS recommends maintaining scientific and technical relevance of exhibits. For example, IMS encourages technical and experimental events (e.g. Plugfest for IEEE1588 connected with International IEEE Symposium on Precision Clock Synchronization for Measurement, Control and Communication ISPCS), exhibitions of new instruments and technical news. Note that conferences are responsible for ascertaining and complying with any tax liabilities associated with the sales and ordering of items at a conference.

2.2.4 Financial support from Industry, awards

Financial support from industry shall be encouraged and shall be structured to the extent possible such that the financial support is received tax-free by IEEE. A Call for Patrons should be provided on the website, clearly describing what the Conference provides (e.g. table for exhibit, logo on the website, etc.) and the requested amount. Financial support must not guarantee publication of a paper in the Conference Proceedings and its submission to the IEEE Xplore: all papers submitted to IEEE Xplore must be peer reviewed and be compliance to IEEE quality requirements.

2.2.5 Awards

Awards issued by a Conference typically include awards to top quality papers, travel awards to encourage high quality student attending the Conference, or awards to incentive youth to emulate excellence. These awards are highly encouraged by IEEE IMS. Awards should be clearly described in the website with aim, requirements, amount, and date of communication. Industries and private societies should be encouraged to financially support the awards. Committees Awards should be assigned by a specific Committee or by the Program Chairs. Award assignment should prevent conflict of interest and should encourage equity between Academia and industry and balance between the Regions. IMS may contribute Awards of financial or solely sponsored events.

2.2.6 Tutorials, Special Sessions, Posters, work-in-progress and Invited Talks

Tutorials, special sessions and invited talks are encouraged by IEEE. Tutorials shall fall within the scientific and technical area of interest of the Conference and it should be clearly shown on the conference website if the tutorial is free or not and, in case, the attendance fees.

The inclusion of Special Sessions (SS) should be clearly indicated in the website. Industrial tracks can be also organized accordingly. Potential SS organizers should contact Program Chairs and submit information (e.g. topic, motivation, Chairs) in order to favor the approving process. SS should be clearly indicated in the website and in the EDAS submission system for a proper submission (if applicable). SS Chairs should be included in the reviewer list of papers submitted to that SS. SS Chairs could be invited to present a talk about the SS topic at the beginning of the SS.

A poster session or a work-in-progress session can be organized, even with different deadlines and rules that for paper submission. IMS strongly recommends clear illustration, in the website or in other advertising tools, of the review process and the publication (e.g. Conference proceedings distributed during the Conference) and submission (e.g. submission to IEEE Xplore) possibilities of all the types of submissions. Invited talks, as well as keynote speakers, are a good way to highlight the quality and relevance of the Conference.

It should be underlined that, IMS technical or financial co-sponsorship implies that every paper published in the Conference Proceedings shall accomplish basic requirements of the review process indicated in the following section “The review process”, no exceptions. Other documents (e.g. abstract, presentation, and so on) concerning tutorials, introductory remarks of SS, work-in-progress, posters, invited talks, can be distributed during the Conference together with Conference Proceedings.

2.2.7 The review process

The IMS has a direct and substantial involvement in the development of the Technical Program of any sponsored or technically sponsored Conference. Normally the review process is organized by the Technical Program Chair/Chairs and papers are reviewed by suitable members of the Technical Program Committee: these member are chosen in order to ensure high expertise in the topics of the paper and to avoid conflict of interest.

IMS strongly supports the full-paper review process. The final paper should be peer-reviewed and this can be easily achieved encouraging submission of full papers, avoiding abstract and extended abstract. Solely sponsored Conferences must allow only full-paper submission and must guarantee the peer-review of the final paper.

The paper review process of the sponsored and co-sponsored Conferences shall satisfy the following basic requirements:

1. A number of qualified Technical Program Committee (TPC) members are appointed by the IMS;
2. TPC members should come from different geographical areas;
3. A minimum and a maximum length of submitted papers must be specified (e.g. typically 4-5 pages, maximum 6 pages, IEEE format); usually the required completeness of a technical paper implies a minimum length of 3-4 pages, IEEE format.
4. Solutions for conflict of interest in reviewing papers by researchers involved in the Conference organization must be specified;
5. Papers must fall within the scope of the Conference
6. Papers must be screened for possible plagiarism. IMS strongly encourages the use of CrossCheck, available for free by IEEE.
7. Papers must be screened for possible paper stuffing (papers from a previously-rejected event)
8. Papers must be peer-reviewed within the deadline by at least two reviewers. IMS strongly discourages the use of students as reviewers. Each reviewer scores over the following four assessment areas:
 - a. Relevance and timeliness: rate the importance and timeliness of the topic addressed in the paper within its area of research;
 - b. Technical content and scientific rigor: rate the technical content of the paper (e.g.: completeness of the analysis or simulation study, thoroughness of the treatise, accuracy of the models, etc.), its soundness and scientific rigor;
 - c. Novelty and originality: rate the novelty and originality of the ideas or results presented in the paper;
 - d. Quality of presentation: rate the paper organization, the clearness of text and figures, the completeness and accuracy of references. Papers that are poorly or unintelligibly written should be rejected, as well as papers with poor organization, as paper that lack some or all of the basic elements commonly found in scientific research papers: Introductory question or hypothesis -> brief summary of related previous scholarly work by others and references -> research methods -> results -> discuss and conclusions

The official language of the Conference shall be English: all papers shall be written, presented and discussed in English. Other requirements can be specified in the MOU.

IMS strongly supports the full review process that is mandatory in solely sponsored conferences:

1. Full-paper only submission (e.g. typically 4-5 pages, maximum 6 pages, IEEE format)
2. Paper formatting according PDF eXpress
3. Electronically managed submission process (e.g. EDAS)
4. Timely notifications to authors of acceptance/rejection; possibility to timely ask for revisions
5. Peer-review of the final manuscript, the paper included in the Conference Proceedings
6. Final decision in charge to Program Chairs

2.2.8 The Conference Proceedings

The Conference Proceedings are distributed to the attendees at the Conference. Conference Proceedings should be organized to well distinguish the section with the papers from the other sections. Suggested information in the Conference Proceedings distributed at the Conference:

- All the information of the Call for Papers
- All the Committees (name and affiliation) of the Conference
- Number of submitted papers and number of accepted papers and the description of the review process (how many reviewers per paper, how many steps of review process)
- A complete list of the Authors (name and affiliation) with the correct page reference
- Bibliographic references (ISSN, ISBN,...), Copyright information
- Table of Contents with description of the Conference organization, including Special Sessions (e.g. Program, Sessions)
- Information about the Keynote or other invited lectures (name, affiliation, title, abstract)

Both Financially Sponsored and Technical co-sponsored Conferences are encouraged to participate in the IEEE Conference Publications Program (CPP). The primary objective of the CPP is to include the papers in IEEE Xplore® for the widest dissemination within the technical community.

However, the publication of the conference proceedings in IEEE Xplore® is not granted by the technical co-sponsorship. It will be ensured only after a positive ex-post review of the paper quality performed under the responsibility of IEEE. If the overall content of the proceedings papers is considered below the IEEE standard of quality, they will not be included in IEEE Xplore®. See section about the Conference Publication form, Electronic IEEE Copyright Form (eCF), and the Letter of Acquisition for more details. Ensure that papers are submitted according to the specifications addressed in Preparing Conference Content for the IEEE Xplore Digital Library, available at http://www.ieee.org/conferences_events/conferences/organizers/pubs/preparing_content.html. Guarantee adherence to guidelines and policies within IEEE Intellectual Property Rights, available at http://www.ieee.org/publications_standards/publications/rights/index.html, including use of copyright, Master Brand/Logo and trademarks.

2.3 Closing the Conference

The Conference is also a way to create and enlarge the scientific and technical community. During the Conference or during the closing session, it is suitable to select attendees and ask for volunteers in reviewing or participating in organizing the next editions. The closing session is also a good time to ask for a simple customer satisfaction module, useful to improve the next edition of the Conference. The questionnaire can be distributed and returned during the Conference or electronically managed just after the Conference closing. It is suitable that, just after the Conference closing, the Chairs compile the Final Technical Schedule of the Conference to be sent to IMS Vice-President for Conferences. There is no other IMS involvement in closing a conference if technical co-sponsorship is the only level of support.

2.3.1 Survey the attendance

IMS suggests to survey attendance satisfaction. A form can be distributed the last day of the event or electronically managed just after the conference to verify satisfaction of attendees. IMS suggests separating questions about local organization, venue and other organizational topic from technical and scientific quality of the event. IMS suggests also quantifying the results of the survey, in order to better highlight pros and cons of that edition.

2.3.2 Send the Conference Closing Schedule to IMS Vice-President for Conferences

The Conference General Chair, supported by the Technical General Chair, shall compile the Conference Closing Schedule and shall send it to the IMS Vice-President for Conferences with the following information not later than 30 days after the end of the Conference. The form requires a mean value of the similarity score of the papers, in order to summarize originality; this score can be easily computed by using CrossCheck, available for free by IEEE. The Technical Program Chairs shall assign a score to the overall scientific and technical quality of the papers in the Conference Proceedings with respect to other events in the same field of interest, also commenting the improvement/decrease of quality of proceedings with respect to the previous editions, if applicable, The final version of the Call for paper is very appreciated for a more complete monitoring of the event, as well as the final technical program. The timely availability and the approval of the Conference Sponsorship Request Schedule and of the Conference Closing Schedule are mandatory to receive the IMS sponsorship to the next edition.

There is no other IMS involvement in closing a conference if technical co-sponsorship is the only level of support.

3 FINANCIAL CO-SPONSORSHIP PROCESS

This section shows the guidelines for requesting the IMS financial co-sponsorship (see section 1.2 and subsections with a special attention to Constraints) and for managing the financially cosponsored event. A more complete information can be found on IEEE Website http://www.ieee.org/conferences_events/conferences/organizers/index.html . Note that normally IMS starts technically co-sponsoring an event, in order to understand if really there is an interest of IMS members to that scientific and technical community, and after few years moves to a deeper involvement, financially co-sponsoring the event.

3.1 Sponsorship request

This section describes step-by-step the procedure for financial co-sponsorship request. Note that most of subsections are equal to the ones for Technical co-sponsorships; in this case the section is empty (see section for technical sponsorship).

3.1.1 Motivation and Preliminary check (see Section 2)

3.1.2 Contact IMS vice President for Conferences sending Conference Sponsorship Request Schedule

After preliminary checks, it is important to establish contact as soon as possible, no later than 12 months before the event, especially if the event is new to IMS financial sponsorship process (not later than 9 months for already IMS financially sponsored events), the IMS Vice-President for Conferences, because the budget must be approved by AdCom. Be sure the email message clearly contains information described in section 2.1.2, including the Conference Sponsorship Request Schedule, and, in addition:

- Brochures showing the venue layout, room accommodations and other facilities
- The budget of the Conference. Please take in account that expected surplus should be not less than 20% of the expected expenses, according to IEEE policies 2014.
- The financial split between sponsors
- How sponsors will share any profit/loss;
- Assignment of administrative responsibilities;
- Who is responsible for indirect taxes, such as the Value Added Tax (VAT), when applicable

The IMS Vice-President for Conferences will contact you for his/her preliminary opinion about the sponsorship. Contact information about IMS Vice-President for Conferences and Technical Committees can be found in the IEEE IMS website at <http://ieee-ims.org/>. The budget form is available online www.ieee.org/documents/financial_reporting_tool.xls ; do not proceed further if you have not received the approval from IMS and take in account that any budget modification requires the approval of IMS.

3.1.3 Submit the budget

The budget previously approved by IMS Vice-President for Conferences must be entered online using the IEEE Conference Financial Reporting, available at http://www.ieee.org/conferences_events/conferences/organizers/conf_app.html?pageType=finance. The budget form is available online www.ieee.org/documents/financial_reporting_tool.xls.

Every technical meeting is expected to follow its budget. IEEE policies recommends that all conference budgets submitted for approval should be set to generate a minimum surplus of 20% over projected expenses. The meeting will discharge all of its debts and meet the surplus as committed in the original budget.

Any change to a previously approved budget, no matter how minor, must be submitted to the IMS Vice-President for Conferences and to the Treasurer for re-approval. The General Chair shall not transmit the original budget or any revisions to that budget directly to the IEEE. All budgets and subsequent revisions will only be transmitted to the IMS Vice-President for Conferences and to the Treasurer.

Note that, according to IEEE's policy 2014, IEEE Conference Service approval is required if the Conference Budget exceeds \$25k in revenue/expenses and the budget must be submitted to IEEE Conference Service at least one year in advance of the Conference.

Note that, according to IEEE policy 2014, conferences where IEEE has greater than a 50% financial responsibility, and where actual income or expense is \$250,000 or more, must be audited by a fully qualified, independent professional auditor.

No expenses for the Conference Organization Committee (e.g. travel, complimentary rooms, and registration waivers) are to be charged to the meeting unless explicitly included in the Conference's approved budget.

An IMS Financially Sponsored Conference can request a loan anytime during the planning cycle. However, this loan should be included in the Conference Budget, and conform to the percentage participation by IMS. Upon request by the Conference General Chair or Treasurer, IMS will approve the loan and contact IEEE Conference Services to process the request. The Conference must repay all conference loans within one month after the conference.

3.1.4 Submit the Conference Application Form (see Section 2)

3.1.5 Check and approve the Memorandum of Understanding (MoU)

The MoU follows the same rules described in Section 2 for technical sponsorship, but it will contain also financial information, as the one required by IMS for approval.

A Fiscal Agent MOU (formerly Banking MOU) is required when conference-related funds are held in an account where IEEE does not have access. Fiscal MOUs are not created automatically through ICX.

3.1.6 Submit the Conference Publication Form for submission to IEEE Xplore® (see Section 2)

3.1.7 Register for Electronic IEEE Copyright Form (eCF) if Proceedings are acquired by IEEE (see Section 2)

3.1.8 Sign the Letter of Acquisition (see Section 2)

3.1.9 Compile the Principles of Business Conduct/Conflict of Interest (POBC/COI)

After approval of the MoU, the general chair or any other conference organizer making business or purchase decisions for a conference must complete the Principles of Business Conduct/Conflict of Interest (POBC/COI) form. The form can be completed and submitted online at <http://www.ieee.org/about/corporate/compliance/coinandpob.html>

3.1.10 Establish the Conference bank account

A Conference must set up a banking account dedicated to the Conference. Both the General Chair and the Finance Chair must sign IEEE Concentration Banking, available at http://www.ieee.org/membership_services/services/financial/treasury/concentration.html. IEEE

Concentration Banking offers IEEE conferences a bank account that pays a higher rate of interest than traditional business checking accounts, along with access to unlimited check writing privilege and access to a conference debit card. It is optional, but highly recommended.

3.2 Managing the Conference

With financial co-sponsorship, IMS is heavily involved in all conference management functions through its designated Professional Conference Organizing company. IMS strongly suggests organizing monthly

meetings among Chairs, starting from at minimum, eight months in advance to the Conference date. These monthly meetings are necessary to ensure all planning duties are being executed on schedule. Meeting minutes should be taken for all conference calls and provided to IMS as requested.

3.2.1 The Call for Papers (see Section 2)

3.2.2 The budget

The budget should be continuously monitored and every modification, even light, must require AdCom approval. No later than six months before the Conference, a very detailed description of the planned expenses shall be available. One month before the Conference and when the early registration date is expired, a thorough revision of the budget is required, especially for the “revenue” section. If the revised “revenue” section does not guarantee the 20% of surplus with respect to the planned expenses, a revision of the expenses is needed, privileging a reduction of social functions still keeping the quality of the Conference high.

3.2.3 The website and advertising (see Section 2)

3.2.4 Exhibits (see Section 2)

3.2.5 Financial support from industries, awards (see Section 2)

3.2.6 Tutorials, Special Sessions and Invited Talks (see Section 2)

3.2.7 The review process (see Section 2)

3.2.8 The Conference Proceedings (see Section 2)

3.3 Closing the Conference

Sole sponsored or co-sponsored conferences cannot be formally closed until a number of financial statements, forms and other documentation are submitted to the IEEE Conference Services. Conference closeout must be done promptly to prevent penalties for late closure. The IMS expects all required Conference closeout documentation be submitted to IEEE Conference Services no later than 90 days after the end of the Conference. The steps necessary to close out a conference are summarized in the following subsections and are listed on the Closing Conference Finances webpage at http://www.ieee.org/conferences_events/conferences/organizers/closing_conference_finances.html where there is an appropriate link to all the needed schedules. The conference general chair should contact IEEE Conference Services directly for any questions relating to the conference closeout procedures.

3.3.1 Survey the attendance (See Section 2)

3.3.2 Send the Conference schedule resume to IMS Vice-President for Conferences (see Section 2)

3.3.3 Repay any loans and distribute surplus

All conferences must repay any conference loans and distribute surplus funds within one month of the end of the conference.

3.3.4 Close the bank account

Close the conference bank accounts after all invoices are paid and any surplus distributed. IEEE requires proof that the bank account is closed.

3.3.5 Submit schedule of tax payment

If your conference made payments to US citizens or takes place in the US, then you must submit schedule of payment forms to IEEE. Complete the forms shortly after the conference ends but no later than 10 January of the next year.

Use the 1099 schedule to report all payments made to US citizens or resident aliens that would be classified as income. Do not include expense reimbursements.

Use the 1042 schedule to report any payments made to non-US people if your conference takes place in the US. Do not complete the 1042 form if your conference takes place outside the US.

3.3.6 Submit financial report

Prepare a final financial report using the IEEE Conference Financial Web form, no later than six months after the end of the conference. Be sure to complete the Certificate of Accuracy (CoA), which is part of the financial Web form.

3.3.7 Audit (if applicable)

According to IEEE policy 2014, conferences where IEEE has greater than a 50% financial responsibility, and where actual income or expense is \$250,000 or more, must be audited by a fully qualified, independent professional auditor or by IEEE Internal Audit. More details are available at http://www.ieee.org/conferences_events/conferences/organizers/finance_audits.html

4 SOLE SPONSORSHIP PROCESS

This section shows the guidelines for requesting the IMS sole sponsorship (see section 1.3 and subsections) and for managing the solely sponsored event. More thorough and complete information can be found on the IEEE Website http://www.ieee.org/conferences_events/conferences/organizers/index.html . Note that normally IMS begins by technically co-sponsoring an event, in order to understand if there is an interest of IMS members to that scientific and technical community, and after few years sponsorship moves to a deeper involvement, financially co-sponsoring or solely sponsoring the event. Sole sponsorship is normally dedicated to those events where most of scientific and technical community is composed by IMS members.

IMS uses a professional company for association management and the organization and management of the flagship Conference and all other financially sponsored events generally use this professional company. This means that the schedule of administrative items in this document are ultimately overseen and handled by this company and duties of the Conference Chairs are limited to the managing of the Conference (see Section 2.2 Managing the Conference with reference to technical co-sponsorship).

Suggestions indicated in section “2.2 Managing the Conference” concerning the technical can be mandatory for solely sponsored events, as it occurs with the review process. It is important to underline that solely sponsored Conferences accept only full papers (typically 4-5, maximum 6 pages, IEEE format) and the Program Chairs guarantee the peer review of the final paper.

Conference _____ (acronym) Sponsorship Request Schedule

(sponsorship request, to be compiled by Chairs for any conference edition)



Compiler Name (Contact for the Conference) _____ Date(dd/mm/yy) __/__/__

This schedule must be compiled and sent by email to the IEEE Instrumentation and Measurement (IMS) Vice President for Conferences (see email address at <http://iee-ims.org/conferences/conferences-1>) before submitting the Conference Application Form and no later than 12 months before the Conference.

Note: the MoU will not be signed by the IMS Vice President for Conferences without his/her approval to this schedule. For more detail see Conference Management Guidelines

Full name of the Conference	_____		
Place of the Conference	_____		
Dates of the Conference	First day (dd/mm/yy) __/__/__	Last day (dd/mm/yy) __/__/__	
First edition? (check and compile if appropriate) Yes <input type="checkbox"/> No <input type="checkbox"/>	website of this/previous edition _____ Previous edition: Number of papers _____ Number of attendees _____ Number of IEEE attendees _____ Number of IMS attendees _____		
Requested sponsorship	Technical <input type="checkbox"/>	Financial <input type="checkbox"/> IMS percentage __%	
Complete list of Sponsors (check if appropriate)	Name _____	Financial <input type="checkbox"/> percentage __%	
	Name _____	Financial <input type="checkbox"/> percentage __%	
	Name _____	Financial <input type="checkbox"/> percentage __%	
	Name _____	Financial <input type="checkbox"/> percentage __%	
	Name _____	Financial <input type="checkbox"/> percentage __%	
	Name _____	Financial <input type="checkbox"/> percentage __%	
	Name _____	Financial <input type="checkbox"/> percentage __%	
	Name _____	Financial <input type="checkbox"/> percentage __%	
First IMS sponsorship? (check if appropriate and motivate the request of sponsorship) yes <input type="checkbox"/> no <input type="checkbox"/>	Motivation (if yes) _____ Planned acceptance rate ____% Use of students as reviewers yes <input type="checkbox"/> no <input type="checkbox"/> Please, attach the technical program of the previous edition yes <input type="checkbox"/> no <input type="checkbox"/>		
Expected number of submitted papers _____	Submission: Abstract <input type="checkbox"/> Full paper <input type="checkbox"/> Use of CrossCheck yes <input type="checkbox"/> no <input type="checkbox"/>	Special sessions yes <input type="checkbox"/> no <input type="checkbox"/> Poster Session yes <input type="checkbox"/> no <input type="checkbox"/>	
Submission to IEEEXplore yes <input type="checkbox"/> no <input type="checkbox"/>	Policy for no-show papers _____	Special Issue no <input type="checkbox"/> TIM <input type="checkbox"/> Other <input type="checkbox"/> (specify Other) _____	
Number of reviewers _____	Attached list of reviewers yes <input type="checkbox"/> no <input type="checkbox"/>	Attached Call for Papers yes <input type="checkbox"/> no <input type="checkbox"/>	
IEEE "rule" of 20% surplus planned? yes <input type="checkbox"/> no <input type="checkbox"/>	Attached budget yes <input type="checkbox"/> no <input type="checkbox"/>		
Planned registration fees (discounted fees shall be provided to IEEE IMS members)	Advanced ____\$	Adv. IEEE member ____\$	Adv. IEEE IMS member ____\$
	Regular ____\$	Reg. IEEE member ____\$	Reg. IEEE IMS member ____\$
	Students adv. ____\$	IEEE Students adv ____\$	IEEE IMS Students adv. ____\$
	Students reg. ____\$	IEEE Students reg ____\$	IEEE IMS Students reg. ____\$
IMS members contacted (IMS members shall be included in the Technical Committees)	Name _____	Email _____	
	Name _____	Email _____	
	Name _____	Email _____	
	Name _____	Email _____	
	Name _____	Email _____	
Financial information (financial sponsorship only)	Administrative responsibility (Names) _____	Number of attached files about Venue layout, room accommodation,.. _____	
Notes about the Conference (e.g. Exhibit, joint events,...) _____			

MoU special requirements	_____		
Eventual other attached files	_____		

Conference _____ (acronym) Closing Schedule

Compiler Name _____ Date (dd/mm/yy) __/__/____

This schedule must be compiled by Chairs and sent by email to the IEEE Instrumentation and Measurement (IMS) Vice President for Conferences (see email address at <http://iee-ims.org/conferences/conferences-1>) no later than 30 days after the Conference. For more detail see Conference Management Guidelines.

Note: the MoU of the next edition will not be signed by IMS Vice President for Conferences without his/her approval to this schedule. The financial information in bold are due only if IMS is a financial co-sponsor.

Full name of the Conference	_____		
Place of the Conference	_____		
Website of the Conference	_____		
Dates of the Conference	First day (dd/mm/yy) __/__/__	Last day (dd/mm/yy) __/__/__	
Conference ID _____	General Chairs (Names)	Technical Chairs (Names)	
% IMS financial (0-100) _____	_____	_____	
Contact for IMS (Name)	_____	_____	
_____	_____	_____	
Other Committees	Board of Directors yes <input type="checkbox"/> no <input type="checkbox"/>	Steering Committee yes <input type="checkbox"/> no <input type="checkbox"/>	
Note: TPC is Technical	Advisory Committee yes <input type="checkbox"/> no <input type="checkbox"/>	Honorary Chairs yes <input type="checkbox"/> no <input type="checkbox"/>	
Program Committee	TPC yes <input type="checkbox"/> no <input type="checkbox"/>	Associate TPC yes <input type="checkbox"/> no <input type="checkbox"/>	
Number of submitted papers _____	Number of rejected papers _____	Number of withdrawn papers _____	
	Number of accepted papers _____	Number of no-show papers _____	
N° of student papers _____	Number of student paper Awards _____	Number of Travel Awards _____	
Number of papers submitted to IEEEXplore _____	Number of papers accepted to IEEEXplore _____	Special Issue in Journals Yes <input type="checkbox"/> No <input type="checkbox"/>	
Revision allowed? no <input type="checkbox"/> minor <input type="checkbox"/> major <input type="checkbox"/>	Number of reviewers per paper _____	Final manuscript reviewed? Yes <input type="checkbox"/> No <input type="checkbox"/>	
	Number of papers per reviewer _____	Mean similarity score (final man.) _____	
Number of attendees _____	Number of IEEE attendees _____	Number of IEEE IMS attendees _____	
Number of students _____	Number of IEEE students _____	Number attendees from industry _____	
Registration fees	Advanced _____\$ Adv. IEEE member _____\$	Adv. IEEE IMS member _____\$	
	Regular _____\$ Reg. IEEE member _____\$	Reg. IEEE IMS member _____\$	
	Students adv. _____\$ IEEE Students adv _____\$	IEEE IMS Students adv. _____\$	
	Students reg. _____\$ IEEE Students reg _____\$	IEEE IMS Students reg. _____\$	
Registration demographic data (numbers)	North America _____ Middle and South America _____	Europe _____ Asia _____	
	Australia and New Zealand _____	Notes: _____	
Number of Special Sessions	Keynote (name)	Invited Speech (names)	
_____	_____	_____	
Main topics (Names of most relevant sessions for IMS) _____			

_____ Please attach the final technical program yes <input type="checkbox"/> no <input type="checkbox"/>			
Notes about the Conference (e.g. Exhibit, joint events,...) _____			

a brief comment about the improvement of quality of proceedings with respect to the previous editions (if applicable) _____			

Score assigned by Technical Program Chairs to quality of papers in the proceedings (1.poor...5.exceptional) _____			
IEEE rule of 20% surplus respected? yes <input type="checkbox"/> no <input type="checkbox"/> Surplus _____\$		Attached final budget yes <input type="checkbox"/> no <input type="checkbox"/>	
Eventual other attached files (e.g. Final Call for paper) _____			