

**IEEE INTERNATIONAL INSTRUMENTATION AND  
MEASUREMENT TECHNOLOGY CONFERENCE**

**I<sup>2</sup>MTC**



**Handbook**

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# IEEE INTERNATIONAL INSTRUMENTATION AND MEASUREMENT TECHNOLOGY CONFERENCE

## WELCOME

This handbook is designed to assist in planning and organizing the IEEE International Instrumentation and Measurement Technology Conference (I<sup>2</sup>MTC) making it a success. Included are general guidelines, answers to some operational questions and suggested deadline dates for various stages of progress. The form at the end of the document (titled: **I<sup>2</sup>MTC Organizing Committee Agreement**) must be signed by the General Chair(s) and the Technical Program Committee Chair(s) in acknowledgement of agreement with the handbook rules contained herein.

I<sup>2</sup>MTC is an international technical forum for disseminating and exchanging information concerning the science and application of instrumentation and measurement – accomplished through technical conference sessions, exhibits, tutorials and publication of conference papers. I<sup>2</sup>MTC – a focused technical conference – is a meeting place where engineers, teachers, scientists, students and others discuss information relative to specific disciplines and areas of interest. The permanent sponsor of the Conference is the IEEE Instrumentation and Measurement Society. This Handbook sets the policy of the I<sup>2</sup>MTC Conference, and a Board of Directors is the governing agent, providing primary direction, advice and counsel to the I<sup>2</sup>MTC Conference Committees. The Society Administrative Committee appoints four members to the Conference Board of Directors. Co-sponsors may be the IEEE section in which the Conference is held each year. There may also be technical sponsors which publicize the Conference and allow the use of their names by the conference, but do not participate financially.

**Continuity is necessary and there are important rules to observe.** However, there is plenty of latitude for change, for updating and for new ideas and techniques. The Conference Committee is a working body and it is important that each member devotes sufficient time to carry out specific assignments. The Conference Committee is composed of the chairs of all committees – General Chair, General Co-Chair(s)\* and Technical Program Committee Chairs (TPC), Associate Technical Program Committee Chairs (ATPC), Industry Liaison Chairs, Arrangements Chairs, Finance Chairs, Publicity Chairs, Tutorial Chairs, Demo Session Chairs, Special Session Chairs, Awards Chairs, and the Conference Coordinator (see Section 2.1). **All chairs must be available during the hours of the Conference.** Chairs must be reachable to answer questions, handle emergencies and generally ensure the smooth operation of the conference. Because the Conference Committee is a team, Chairs must be available to fill in for other committees in emergencies and when requested to solve problems and/or relieve a work jam.

The Conference Coordinator (currently Conference Catalysts) operates as paid staff, providing support and backup to each chair and maintaining a central office for administrative activities. Conference Coordinator's specific duties are covered in section 1.0 Introduction under 1.4 Conference Coordinator. Copies of **all correspondence** relating to the conference should be sent to the Conference Coordinator. **The Conference Coordinator is the agent of the Board of Directors and is authorized to and must approve any single commitment of Conference funds of \$3,000 (USD) or more.** Generally, these commitments include hotel and facility contracts, meal guarantees and contracts for special events.

The Conference has a [permanent web site](#), which provides full details on the Conference.

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\* See Section 4.0  
Updated: March 2026

# 1.0 INTRODUCTION

## 1.1 History

A predecessor conference to the IEEE International Instrumentation and Measurement Technology Conference was held annually for 16 years in Ottawa, Ontario, Canada, and was called the "Electrical and Electronic Measurement and Test Instrument Conference." The first EEMTIC, as it was known, took place in 1966 and was dedicated solely to test instruments and measurement. Its purpose was broadened in later years to cover the science and application of instrumentation and measurement. The conference was not held in 1982 and 1983 and the Instrumentation and Measurement Society voted to revive the event and to select new conference sites for each year. The name, Instrumentation and Measurement Technology Conference (I<sup>2</sup>MTC) appeared for the first time in 1984 in Long Beach, California. Due to its recognized international relevance, the conference changed the name to IEEE International Instrumentation and Measurement Technology Conference (I<sup>2</sup>MTC) in 2008.

## 1.2 Conference Planning

Conference planning should begin at least three years prior to the date of the Conference — actually, the Conference begins its official existence when the I<sup>2</sup>MTC Board of Directors approves a conference proposal. The Board of Directors generally meets twice a year, at I<sup>2</sup>MTC in the spring and in connection with the Society Administrative Committee meeting in the fall. Proposals for hosting I<sup>2</sup>MTC are considered by the Board at these meetings.

IEEE members<sup>1</sup> seeking to host an I<sup>2</sup>MTC must review and carefully consider the [Bid Document and initiate a Letter-of-Intent](#) and submit it to the I<sup>2</sup>MTC Board Chair and the Conference Coordinator between October 1<sup>st</sup> and December 31<sup>st</sup>. Finalists for consideration will be notified when complete proposals are scheduled for Board consideration. Only the conference 3 years in the future will be awarded - for example, the 2017 conference will be awarded at the Spring 2014 Board Meeting. It is recommended that a representative attends the Board meeting to make a presentation in person and answer questions. As a minimum, the proposal should include the Conference theme and the following three elements.

- a. Conference Arrangements — The time and place for the Conference must be proposed and shall not conflict with any other conferences sponsored by I&M or with any secular or religious holidays. To avoid conflicts with academic institutions, the conference date should be between May 15<sup>th</sup> and the last Monday in May. **Any proposed change to this period MUST be approved by the I<sup>2</sup>MTC Board Chair.** The Conference Coordinator participates in arranging dates and site selection. The sample calendar includes I&M AdCom meetings that must be coordinated with the conference.
- b. Organization — Key members of the conference organization should be identified, along with their commitments to support the conference and resumes of their experience with previous conferences. Important members of the committee, identified as a minimum, are the Conference Chair (and co-chair when appropriate), Technical Program Committee (TPC) Chairs (see section 1.5), Associate Technical Program Committee (ATPC) Chairs, Finance Chair and Arrangements Chair. If the Conference Committee plans exhibits, it should outline a strategy and identify potential exhibitors.

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<sup>1</sup> As per IEEE: General Chair(s) should be a member of IEEE or of a co-sponsoring organization.

- c. Financial Budget— The financial budget should be prepared using the Financial Report and Working Sheet Forms cited in the IEEE Conference Planning Guide. Important aspects of the financial budget are the fee schedule (**set by the I<sup>2</sup>MTC Board of Directors**), the expected number of registrations and anticipated income from other sources (e.g., exhibits, patrons). A budget of expenses must be provided. As recommended by IEEE, the proposed budget should plan for a minimum financial surplus of 20% of total expenses. Conference organizers are cautioned that if an initial budget submission using approved and expected expenses cannot yield an adequate surplus, the organizers' proposal may be deemed lacking. However, during the execution of the conference, the Board may approve budget revisions that budget a lower surplus if it is in the interest of the IMS and its members.

The I&M Society and a local Section co-sponsor enter into a Memorandum of Understanding (MOU) that spells out specific responsibilities of and benefits to both parties and responsible point(s) of contact at the local Section. **The letter is the cornerstone of the Society-Section partnership in the specific I<sup>2</sup>MTC conference.**

### ***1.3 Planning Schedule***

A representative Conference timeline of key events is a guidepost for planning. Individual conference schedules vary in detail but most will include at least the actions shown.

### ***1.4 Conference Coordinator***

I<sup>2</sup>MTC employs a professional Conference Coordinator to ensure consistency and quality of experience from year to year. The Conference Coordinator is paid a retainer fee, and is contracted by each conference through a Statement-of-Work (SOW). The Conference Chair signs this SOW prior to services being provided. However, prior to signing, the Conference Coordinator's SOW must be reviewed and approved by the I<sup>2</sup>MTC Board Chair as to its form, the compensation and the tasking for the Conference Coordinator. The SOW must reflect the IMS policy of not paying commissions on exhibitors or promotional sponsors unless the Conference Coordinator specifically is requested to identify potential promotional sponsors and then identifies and obtains a new paying sponsor(s) or exhibitor(s).

The Society loans funds for the Conference share of the fee with repayment after the Conference. The Conference Coordinator administers the IEEE Concentration Bank Account on behalf of the Conference. The conference database is maintained in the Conference Coordinator's office. The Conference Coordinator acts as liaison with IEEE Headquarters and I&M Society leadership and when appropriate with the local section co-hosting the conference. The Conference Coordinator helps organize and produce I<sup>2</sup>MTC and answers to the I<sup>2</sup>MTC Board of Directors. The Conference Coordinator's office works with all committees in helping carry out their responsibilities. Although the Conference Coordinator reports to the Conference Chair, the Conference Coordinator is available to all members of the Conference Committee, as needed. The Conference Coordinator serves as the administrative agent of the I<sup>2</sup>MTC Board of Directors for conference operations and the representative of the I&M Society AdCom.

The Conference Coordinator's office is the administrative office of the Conference. It monitors all Conference activities, maintaining a checklist of actions scheduled, under way and completed.

The Conference Coordinator maintains software programs specifically developed to handle I<sup>2</sup>MTC finances, registration, mailing lists, electronic proceedings production and program production. All

registration, financial, technical program and mailing list data flow through the Conference Coordinator as part of the corporate memory of I<sup>2</sup>MTC which is to be maintained. The Conference Coordinator is responsible for filing with IEEE the Conference Information, Conference Publications, and Insurance Application forms and budget.

Several foundations and private organizations may provide travel funds for qualified persons to attend conferences. The Conference Coordinator serves as the contact between these funding sources and the Conference.

The I<sup>2</sup>MTC Board of Directors is **required** to approve in advance any major commitment of funds; "major" in this case is generally considered any expense commitment exceeding \$3,000. The I<sup>2</sup>MTC Board has delegated this approval process to the Conference Coordinator, and he must be consulted before contracts covering all printing, hotel/facilities and exhibit decorating services are signed. The Conference Coordinator must be included in decisions relating to meal guarantees during the conference.

## **1.5 Conference Coordinator Activities**

The Conference Coordinator provides the following basic support to committee chairs:

**General Chair** - Advises on policy, organization and timing, acts as liaison with IEEE Headquarters and I&M Society, maintains corporate and historical files, coordinates travel grants and other support from foundations and organizations; prepares and submits conference application, interfaces and handles negotiation and contracting with conference facility and participates in development of conference theme, logo and support materials. The General Chair will serve as the official decision maker for the conference, in coordination with the Conference Coordinator.

**General Co-Chair(s)** - Shares all responsibilities of the General Chair and may provide background information and logistical support for selected speakers.

**Technical Program Committee (TPC) and Associate Technical Program Committee (ATPC) Chairs** - Assists in preparation and distribution of call-for-papers, configures and manages the web-based papers program, updates the website on an ongoing basis so that authors and attendees are advised of the status of the program, monitors registrations and payments by authors assists with the review process and maintains a database of reviewer scores and comments to author and Technical Program Chairs, ensures requirements for IEEE- mandated Xplore Digital Library compatible formats are met, prepares and posts on the web author kits and accept and reject notices, collects manuscripts submitted for Proceedings and serves as principal information source for authors, maintains checklist of materials received and posts on the web and provides Xplore content to IEEE.

**Exhibits** - When exhibits are included, the Conference Coordinator provides application forms and contracts for exhibiting companies, assists in selecting and negotiating with an exhibit contractor and establishing move-in, move-out hours and other regulations and helps with exhibit floor layout as requested. An Industry Liaison (previously called Exhibit Chair) will be assigned to assist the Conference Coordinator in soliciting, arranging and promoting conference exhibits.

**Tutorials (Not to be confused with Education Committee Tutorials Program)** – Participates in publicizing the Tutorial Program and developing registration form, collects registration fees and produces receipts and certificates of attendance.

**Special Sessions & Special Sessions Chairs** - The Special Sessions (SS) are managed by the **Special Session Chairs**. The process begins with a Call-for-Special Session Proposals (in the

Appendices Section), where SS proposers submit their session concepts for evaluation. At the proposal stage, the SS proposers must identify the format of their SS, which would be with: (a) an Invited Presentation, (b) an Invited Paper), or (c) without an Invited Presentation/Paper.

The SS topics must (as much as possible) not conflict with the topics of regular sessions. In case there is a SS whose topic is closely related to a regular session, they may be combined into a larger SS. If two closely related topics (one SS and one regular) are scheduled, any shortage/overflow of accepted papers in one may be combined into the other.

Upon approval by the SS Chairs, these proposers formally transition into SS Organizers. Special Session Organizers are responsible for soliciting papers and managing the peer-review process within their approved sessions, whereby every paper must undergo at least 2 reviews (i.e., consistent with regular paper review process). Special Session Organizers manage the reviews and provide initial recommendations for papers within their sessions to the SS Chairs. Please see the Important Note below for the final approval step.

**Special Session Chairs** – Special Session Chairs are responsible for the overall technical quality of the Special Sessions. They collaborate closely with the Technical Program Chairs (TPCs) to manage the evaluation, and organization of the SSs. Once SS proposals are accepted, the SS Chairs coordinate with the approved SS Organizers to oversee the paper review process. Once the initial recommendations for SS papers are received by the SS Chairs, they must submit a consolidated final recommendation to the TPCs.

**Important Note:** The SS process introduces an additional tier of decision-making compared to the Regular Tracks: while SS Chairs provide oversight and recommendations, **However, the final decision on acceptance for all Special Session papers rests with the TPCs.**

**Arrangements** - Identifies specific needs for session and poster rooms, Gala Dinner space, plenary hall, exhibits area, signs, committee meeting rooms and sleeping accommodations and aids in selection of hotel/facility and negotiating contacts. Works with local committee to select attendees' bags (if any), and features of social events, including welcome reception, Gala Dinner and companion tours (if any). Submits all contracts to IEEE for review which involve a commitment of funds.

**Registration** – Develops author and attendee forms with fees set by the I<sup>2</sup>MTC Board of Directors. Collects all advance registrations via check, bank transfer and credit cards. Operates registration desk onsite, coordinates onsite registrations, badges, tickets, receipts, and certificates of participation.

**Finance** - Assists in developing budget files, initial and interim, manages Conference bank account, reconciles account and handles receivables and payables, providing regular reports to the Finance Chair. Obtains insurance coverage (automatic upon submission of conference application). Contacts I&M Society and local section for seed money advance loans and handles return of seed money and payment of surplus prior to closing conference. Participates in final financial reporting and prepares and submits materials for official external audit (when revenues exceed \$250K), performed by IEEE auditors. Performs internal audit of conference financials regardless of revenue level. Ensures that an accrual-based financial report is submitted to IEEE by November 30 of the Conference year and final financial report is submitted for audit within six months after the Conference. Failure to close conference books within one year will result in financial penalties assessed against the Conference by IEEE.

**Awards** - Arranges the Awards ceremony process and develops certificates of participation and attendance when specified and responds to individual requests for such material. Obtains specified plaques and monetary prizes for I&M Society awards.

**Publicity** - Prepares and distributes news releases and articles for I&M Magazine and local section newsletters, as well as any local media materials as needed. Supervises distribution of call for papers and advance program via the web. Helps coordinate any attendance promotion efforts.

**Conference Coordinator** - Creates and maintains conference web site. Posts call-for-papers, abstracts received and advance program, author instructions, forms for conference registration and hotel reservation, information and attractions of the conference city and venue and other relevant information.

**Publications** - Works with the Technical Program Chairs in preparing and supervising the Advance Program, the Conference Proceedings and the Conference program - in short, all materials required for the conference. With the Technical Program Chairs, ensures papers are received in time to be included in the Conference Proceedings. Ensures receipt of completed copyright forms that are required from authors to publish their papers. Advises authors that any required clearance by a company must be obtained by the individual author(s).

Only accepted papers that are scheduled for presentation (oral or poster) at the conference and where the required registration fees are paid are included in the Conference Proceedings.

The Technical Program Chairs and the Conference Coordinator establish deadlines for receipt of papers and ensure proper preparation of papers, receipt of final manuscripts and confirmation of Xplore compatibility, required for final publication. Detailed information must be published in an Author Instructions page on the conference website.

The Publications Chair consults with the Arrangements Chair and the Industry Liaison (previously called the Exhibits Chair) to make certain places and times are correct, and listings of exhibitors appear in the Conference Proceedings and the advance and final programs. He or she obtains from IEEE Headquarters the pertinent IEEE catalog and ISBN registration numbers: this information is available from the IEEE Acquisitions Administrator.

The Conference Coordinator produces the Proceedings. There are certain requirements that must be met.

- **Cover** - It may reflect the Conference theme or location. The cover must include I<sup>2</sup>MTC with the two-digit year and a unique catalog number designated by IEEE Conference Services.
- **Title Page and Index** - Name, date, location of conference, Conference Proceedings heading, IEEE catalog, Library of Congress and ISBN registration numbers and sponsors.
- **Reprint Criteria and IEEE Responsibility Statement** - Standard item inside title page.
- **Chair's Messages** - Two pages of welcome remarks by General Chair and Program Chairs
- **Keynote Speaker** - The identity of the keynote speaker(s), their professional credentials and a general preview of the presentation are listed.
- **Conference Committee** - The organization, committee officers and their company affiliations. Also identifies the I<sup>2</sup>MTC Board of Directors.
- **I&M Society Information** – Society representative and Society Awards information is listed.
- **Special events** - A tutorial schedule is usually included, as is any special tour and the Dinner entertainment. A special honor or award presentation falls into this category.
- **Table of Contents** - Lists each technical session, with paper titles and authors' information. Author names are hyperlinked to their papers.
- **Author Index** - An alphabetical list of authors and the page(s) on which their paper(s) appear. Author names are hyperlinked to their papers.

The official name of the conference is the IEEE International Instrumentation and Measurement Technology Conference (I<sup>2</sup>MTC) and IEEE must be prominently displayed in all Conference

materials. The IEEE logo must appear on the cover and title page of the Conference Proceedings, and in the Advance Program, final program and Call for Papers. Electronic copies of the logo are available from the Conference Coordinator. Instructions on how to use the IEEE logo and suggestions for layout, cover and binding can be found on the web at:

[http://www.ieee.org/conferences\\_events/conferences/organizers/publishing\\_conference\\_papers.html](http://www.ieee.org/conferences_events/conferences/organizers/publishing_conference_papers.html)

Click on Conference Organizers and IEEE Master Brand.

The Advance Program is posted on the I<sup>2</sup>MTC website approximately two months before the conference. The program contains a preliminary listing of sessions and accepted papers, Conference technical and social events, features of the conference site and city and other pertinent information.

## **1.6 Final Program**

The final program is distributed to attendees at the Conference and contains the final program schedule, room assignments, list of exhibitors and information on the keynote address, social activities and any special events. It is not necessary to include registration forms or hotel reservation applications or “how to get to the Conference” information. Messages from the Conference General Chair (and Co-Chair(s)) and Technical Program Committee Chairs are included in the Proceedings and should also be included in the final program. The program is **only** distributed electronically through the conference website and via the mobile app.

## **2.0 CONFERENCE COMMITTEE**

### **2.1 Composition**

The Conference Committee is composed of the chairs of all committees – General Chair, General Co-Chair(s)\* and Technical Program Committee Chairs (TPC), Associate Technical Program Committee Chairs (ATPC), Industry Liaison Chairs, Arrangements Chairs, Finance Chairs, Publicity Chairs, Tutorial Chairs, Demo Session Chairs, Special Session Chairs, Awards Chairs, and the Conference Coordinator. The Conference Committee, **which exists under the authority of the I<sup>2</sup>MTC Board of Directors**, is the Conference operating and steering authority and is responsible for the staging of all aspects of the Conference. Through the Conference Chair, the committee reports to the I<sup>2</sup>MTC Board of Directors. **It is highly recommended that the members of the Conference Committee must be IEEE member and members of the Instrumentation and Measurement (I&M) Society** (see Section 1.2).

## **3.0 GENERAL CHAIR**

### **3.1 The Chair’s Role**

The General Chair and the Co-Chair(s), under the authority of the Board of Directors, are **responsible for all activities and operations concerning I<sup>2</sup>MTC**. The assignment for the General Chair and Co-Chair(s) is to select and supervise all committee chairs with the exception of the

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\* See Section 4.0  
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Technical Program Committee that are assigned in accordance with the three-year rotating Technical Program Committee clause at the start of Section 5.0. General Chair and Co-Chair(s) will monitor and coordinate the activities of all the committee chairs to ensure events progress in a satisfactory manner. The General Chair (assisted by the Co-Chair(s)) presides at committee meetings and is responsible for their scheduling and execution. **The General Chair is the chief operating officer of the Conference and is responsible for direct reporting to the I<sup>2</sup>MTC Board of Directors.**

### **3.2 Chair's Duties**

The General Chair is the contact point with the I<sup>2</sup>MTC Board of Directors. Duties include scheduling Conference Committee meetings, developing meeting agendas and chairing meetings. Frequent communication among the committee members is a key to success. Meetings should increase in frequency as the conference approaches. One year away, meetings every other month involving the chairs and volunteers are acceptable. Six months away, meetings should occur at least monthly. The General Chair often is the contact with keynote, and/or luncheon speakers (if applicable) and is responsible for invitations to such individuals. The General Chair also is responsible for providing backup speakers in the event scheduled speakers drop out – or ensuring that key speakers provide a replacement if they can't appear.

The General Chair is responsible with the Conference Coordinator for filing the Conference Application with IEEE Conference Services. This form must be received by IEEE before advance funding seed money can be released.

The General Chair (assisted by the Co-Chair(s)), Finance Chair and Conference Coordinator will oversee the return of seed money, distribution of surplus monies, filing of the final report and the closing of the Conference bank account. A preliminary financial report is to be issued within three months after the Conference and an accrual-based report must be submitted to IEEE by November 30<sup>th</sup> of the Conference year. An audited final report will be completed as soon as all financial obligations are settled and will be submitted to the Board of Directors, sponsors and IEEE headquarters. Final reports and audits not completed within one year of the conference close will result in financial penalties leveled against the conference by IEEE. A professional auditor is required by IEEE for all conferences with revenue exceeding \$250K (USD). Auditing services are available from IEEE itself, or an independent professional may be selected. Selection of an auditor is arranged by the Conference Coordinator and is subject to approval of the I<sup>2</sup>MTC Board of Directors.

**IMPORTANT** – Attendees residing in countries outside the conference country must be reminded to apply as early as possible for visas if/where required – in some countries the process takes up to three months. With heightened security around the world, many nations are beginning to require visas. The Conference Coordinator can notify affected attendees as soon as their registrations are received, in the case of authors when their papers are accepted. The Conference Coordinator handles all invitations to attend the conference. **The General Chair must provide a signature and contact information to include in invitation/visa letters.**

## **4.0 CO-CHAIRS**

Up to two Co-Chairs may be appointed and the duties of General Chair divided or shared by their mutual agreement. The Co-Chairs must be identified **at the time of bidding** along with other critical positions.

## 5.0 TECHNICAL PROGRAM COMMITTEE (TPC) AND ASSOCIATE TECHNICAL PROGRAM (ATPC) CHAIRS

The composition of the I2MTC Technical Program Committee (TPC) is based on a rotating three-year terms. Each year, names of the two TPC chairs will be provided **by the I<sup>2</sup>MTC Board** to the future I<sup>2</sup>MTC bidders, and the bidders are required to only nominate the third member of the TPC in their bid. The three-member team collaborate to fulfill the responsibilities of the TPC and reach decisions based on “consensus” among the three. In this way, the TPC members for year (n) of the I<sup>2</sup>MTC will consist of: one member who is a TPC member from year (n-2), another member from year (n-1) and a third member appointed by the General Chair of year (n). The rotation gets updated accordingly for I<sup>2</sup>MTC year (n+1).

The TPC chair(s) creates the conference timeline and approves it for release. The TPC chair(s) assigns Associate Technical Program Committee (ATPC) Chairs to each (regular) track of the conference. The Special Session tracks are managed by the Special Session Chairs, who oversee the review process for Special Session papers and provide recommendations to the TPC Chairs. Special Session Organizers serve as ATPC for their respective Special Session track. Each track is assigned a minimum of 2 ATPC Chairs, although it is suggested to have more than 2, particularly for tracks with many submissions. The ATPC Chairs manage the review process within their respective track and enter a suggested decision for each paper based on the reviews after the review process has ended. The TPC Chairs manage any remaining papers after review deadline that still need reviews, including performing reviews directly as needed to meet the minimum 2-review per paper requirement. The TPC Chairs also manage papers in tracks where ATPC Chairs have COI. The TPC Chairs review each suggested decision for final approval. After all suggested decisions have been reviewed, the TPC Chairs approve the decision set for release by the Conference Coordinator. The TPC Chairs also build the conference program after all final versions have been submitted and ensures that that each track (oral and poster sessions) has two session chairs. The TPC Chairs also oversee management of the student best paper contest and best paper contest, including arranging for judges and reporting outcomes to the Conference Coordinator.

### 5.1 Overall Responsibilities

The program is the heart of the Conference and must be of the greatest possible quality and technical and educational value to the instrumentation and measurement community. The program includes both oral presentations and poster sessions. The TPC Chairs provide the necessary program information for the call-for-papers, advance program and Conference Proceedings and advise the **Arrangements Chair** of facilities needed for the sessions. The TPC Chairs have the final say in the selection of all papers. No single chair, however, shall be allowed to individually approve a paper or papers. To avoid conflict of interest, a reviewer or a TPC Chair, may not participate in the review or approval of any paper in which they have participated as an author or presenter, are affiliated with co-author, and/or are employed by the same organization/university. They exchange with the Conference Coordinator regular reports on all papers submitted, authors and their affiliations, status in the evaluation cycle, author notifications, final papers received and session assignments.

The TPC Chairs cooperate and coordinate with the Editors-in-Chief of the *IEEE Transactions on Instrumentation and Measurement* (TIM) and the *IEEE Open Journal of Instrumentation and Measurement* (OJIM) in facilitating the publication of a Special Issue/Section in these respective journals. They make sure that session chairs complete author evaluation/attendance reports and notify the Conference Coordinator and the Editors-in-Chief of papers not presented and therefore ineligible for these Special Issue/Section.

The TPC Chairs will contact all session chairs, assist them with author/speakers, and work with the General Chair in coordinating technical sessions with keynote and luncheon speakers and with tutorial sessions, if any. They will determine, after consulting with the General Chair if papers will be invited, secured through a call-for-papers or both. They will work with the Conference Coordinator and the Webmaster in posting the Call-for-Papers on the Conference web page and will publicize it within the instrumentation and measurement community.

The TPC Chairs, through the ATPC Chairs assigned to individual sessions and Special Session Organizers (serving in an ATPC Chair role), will assign reviewers to each submitted paper. Reviews are completed through the paper management system. The ATPC Chairs recommend selected papers and the TPC Chairs approve the selections and place them in their respective sessions. An Advance Program will be posted on the web, in coordination with the Conference Coordinator two months prior to the conference.

All regular conference track paper reviews are assigned by the ATPC Chairs for the track. They provide decision recommendations to the TPC Chairs following the review deadline.

All special session organizers are the ATPC Chairs for their specific track and assign reviewers to papers within their track. The Special Session Chairs provide the decision recommendations to the TPCs following the review deadline.

All papers marked with the decision Revise & Resubmit will undergo a second review. This review is completed by the ATPC Chairs for the track. They again recommend a decision to the TPC Chairs after completing the review.

The Late Result track submissions are reviewed by the TPC Chairs and additional committee members if needed.

The TPC Chairs will assist with review assignments should any ATPC Chair have a conflict of interest with papers in the regular conference tracks. Special Session Chairs will assist with review assignments should special session organizers have conflicts of interest with the papers submitted to their track.

The TPC Chairs with assistance from the ATPC Chairs will select session chairs or moderators who are well known and knowledgeable in their respective fields and who will help attract an audience. The TPC Chairs and Conference Coordinator, are responsible for briefing session chairs on their responsibilities and to encourage active participation in session development. The Conference Coordinator will produce instruction guidelines for session chairs to include with the letter confirming a chair's appointment (see Section 14.2.1 for additional instructions).

## ***5.2 Call-for-Papers and Review Timeline***

The Call-for-Papers should emphasize the Theme of the Conference and the suggested topic areas. All communications to prospective author/speakers (unsolicited or invited) must direct authors to the web and author kit and must note that paper publication is subject to receipt of a FULL registration fee from at least one author.

The Call-for-Papers must (at minimum) include the following:

- A statement of the conference theme and suggested topics of interest.
- Paper due date, author's notification date and due date for revised paper.
- Instructions for preparation and electronic filing of the paper.
- Notice that if a paper isn't accompanied by a FULL registration fee and presented at the

conference, it will not be published in the proceedings and if it is not presented it will not be eligible for the TIM or OJIM Special Issue/Section.

- Notice that a FULL registered authors MUST present (Oral or Poster) the paper.
- Direction that authors check the Conference website for the progress of their paper(s).
- Notice that only papers (not abstracts) greater than three pages and less than 6 pages in length will be accepted.
- Notices must be added in the call-for-papers that the papers will be reviewed consistent with the I&M Society requirements and accepted papers that appear in the IEEE Xplore will have a header indicating this fact.

The deadline for papers should be sufficiently in advance of the Conference to allow ample time for review. Submissions should be acknowledged by e-mail with assignment of a paper number as they are received (the web will list the paper numbers and later accepted papers only will be listed by number. All authors must receive acceptance or rejection notifications no later than the date stated in the call-for-papers.

The Technical Program Chairs must prepare a clear and realistic schedule to ensure effective promotion of the conference program and attendance planning by authors. Consequently, to provide accepted paper authors with sufficient time to obtain internal approvals for travel, etc., there must be **at least three weeks** between when the last of final paper acceptance notifications are sent to authors and the deadline for early registration. The timeline must also ensure sufficient time for everyone involved in the review process (ATPC Chairs, Reviewers, TPC Chairs, and Authors) to perform their tasks. Suggested time blocks include a minimum of:

- 2 weeks for ATPC Chairs to assign Reviewers
- 3 weeks for Reviewers to conduct reviews (4 if this period falls over the Holidays)
- 1 week for ATPC Chairs to input suggested first round decisions
- 1 week for the TPC Chairs to review and approve first round decisions
- 3 weeks for revised paper submissions
- 1 week ATPCs to input suggested second round decisions
- 1 week for the TPC Chairs to review and approve second round decisions
- **3 weeks gap from final notifications to end of early registration.**

**REMOTE PRESENTATION OF A PAPER WILL NOT BE ALLOWED UNLESS A HYBRID OR VIRTUAL CONFERENCE HAS BEEN AUTHORIZED BY THE I2MTC BOARD OF DIRECTORS.**

### ***5.3 Selection of Papers and Registration Requirements***

Regular I<sup>2</sup>MTC Proceedings papers **must** be 4-6 pages in length. These are papers that once pass the review process and are presented at the Conference with a paid FULL Registration Fee appear in the IEEE Xplore.

The Technical Program Committee will determine which papers are suitable for presentation (Oral or Poster) at the Conference and for publication in the Conference Proceedings. Accepted papers are listed by number on the website. Manufacturing of the proceedings in electronic format begins about one month before I<sup>2</sup>MTC and all papers should be in hand at least one month prior to this deadline. The author kit contains early deadline dates for the Proceedings – many authors submit papers later than the published deadline, so an early date is recommended to overcome widespread tardiness. Authors are advised their papers will not be included if their material is not received in time.

The IEEE Xplore program is the worldwide dissemination of Conference Proceedings to its subscribers. Xplore compatibility requires certain PDF settings and a separate submission to the IEEE PDF eXpress site to ensure compatibility. The Conference Coordinator is responsible for

confirming Xplore compatibility.

The author kit contains instructions to authors for preparing papers and is posted on the I<sup>2</sup>MTC website.

To ensure author attendance and avoid no-shows, the I<sup>2</sup>MTC Board of Directors requires that all authors/speakers pay the full Conference registration fee in advance of the Conference Proceedings deadline in order for their papers to be published in the Proceedings. Papers will not be included unless material is submitted in electronic format with copyright form and full registration form and fees. Papers will also not be included in Xplore unless it is presented at the conference by one of the co-authors or an authorized substitute, who is familiar with the work. In addition, policy mandates that **a full registration fee must be connected to each paper presented**, even if authored and presented by a student, Life Member or other special category of member. In such cases, a student or other category member must pay a FULL registration.

In addition, one author full registration will cover the publication expenses for only **ONE** accepted paper. Authors presenting up to 2 additional papers without a co-author registered are required to pay an additional paper fee of \$100 for each additional paper. Authors presenting more than 3 papers must pay an additional full registration for the 4<sup>th</sup> paper, \$100 for the 5<sup>th</sup>, etc.. In the case which no registration has been received and correctly processed to cover the paper publication, the conference organizers will contact the authors before the paper is removed from the proceedings.

A list of “no-show authors” (see Section 14.2.1) is maintained by the Conference Coordinator and is made available to future program committees and the IEEE Transaction on Instrumentation and Measurement (TIM) and the IEEE Open Journal of Instrumentation and Measurement (OJIM) Editors-in-Chief. No-show authors are those whose papers have been accepted, but who have failed to appear at the Conference and have not arranged for a substitute presenter in advance.

Best practices for the selection of Student Best Paper (delivered as Poster<sup>1</sup>) and Conference Best Paper Awards are provided in the Appendices Section, and must be closely followed.

The Technical Program Committee members will familiarize themselves with and follow the relevant guidelines of the current [IEEE Publication Services and Products Board Operations Manual](#). Each submission intended for publication in IEEE Xplore must receive at least two independent reviews, with three reviews preferred. Guided by the reviewer’s recommendations, the Technical Program Committee will assign each submission to the categories Accept, Resubmit with Minor Revisions, or Reject. If needed, the Technical Program Committee may act as reviewer or may intervene in the second run of the review process in order to shorten the procedure. There will **NOT** be a Major Revision option. Submissions requiring major technical improvements will be rejected. The Technical Program Committee members will ensure to appropriately inform the reviewers about the procedure in order to avoid unintended Major Revision requests that are not in line with the conference review process. Submissions requiring significant editorial improvements may be assigned to Resubmit with Minor Revisions or Reject at the Technical Program Committee’s discretion.

## ***5.4 Program Content***

The objective of the conference is to give the best exposure to subjects and authors in the entire instrumentation and measurement community, and emphasis should be given on avoiding grouping of multiple papers in a specific session from the same institution.

## ***5.5 Papers per Session***

Generally, oral sessions are programmed to last approximately two hours. Each paper typically is

allotted a total of 25 minutes; 20 minutes for presentation and five minutes for questions. Therefore, four to five papers can be planned for each session. Session chairs are responsible for limiting speakers to their allotted time and encouraging discussion. Also, see Section 14.2.4.

## 5.6 Poster Sessions<sup>Y</sup>

Papers may be placed into poster sessions in which authors explain their work to small groups or one-on-one. Papers are posted on poster boards, and authors meet with attendees in front of the poster boards. **Poster sessions carry the same technical importance and weight as the oral sessions and NO distinction is made in the respective published I<sup>2</sup>MTC Proceedings.** These papers are published in the Proceedings and are eligible for the special issue of the IEEE Transactions on Instrumentation and Measurement (TIM) and the IEEE Open Journal of Instrumentation and Measurement (OJIM), or conference Best Paper Awards. This is **merely** a different mode of presentation than oral sessions and one that appears to be growing in popularity.

The precise size of poster board space must be included in the author kit on the web. The information is treated as critical by authors who plan to or are assigned a poster presentation. The Technical Program Committee Chair is responsible for selecting volunteers as poster session chairs. A poster session chair is responsible for ensuring the following rules are followed for their assigned session.

- Posters should be affixed to the assigned poster board at least fifteen minutes prior to the beginning of the session.
- The name and photo of the author who is available throughout the session to answer questions must be posted with the paper or printed within the poster.
- The designated author should be available for discussing the paper for the duration of the session.
- All posters must be removed at the end of the session.

## 5.7 Conference Program

**Multiple Tracks** – I<sup>2</sup>MTC generally hosts four or five tracks which accommodate a total of 4 to 6 papers in each regular session and 35 to 50 poster papers in each poster session. The opening session of the conference is a single, or plenary, session setting the tone of I<sup>2</sup>MTC and featuring a prominent authority in instrumentation and measurement that presents new or far-reaching information of general interest.

**Panels** - Panels offer a change of pace from the more structured presentation of papers and can be effective for a subject of timely interest if the panelists are provocative communicators. Panels generate discussions, possible controversy and add contrast to technical paper sessions.

**Tutorials (Not to be confused with Education Committee Tutorials Program)** - Applications-oriented workshops can provide excellent background and new developments in a subject. Tutorials are presented on the first day of the conference but are not included in the conference proceedings. Attendance in the Tutorials Program is covered by the conference registration.

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<sup>Y</sup> I<sup>2</sup>MTC does NOT differentiate between Poster and Oral presentations. The only difference is the delivery mode.

## ***5.8 Special Issue of the Transactions on I&M (TIM) and the Open Journal of I&M (OJIM)***

Technically-extended versions of accepted and published I<sup>2</sup>MTC Proceedings papers may be submitted for publication in the I<sup>2</sup>MTC Special Issue/Section of the Transactions on I&M (TIM) or the Open Journal of I&M (OJIM). The latter is the Gold Open Access journal of the I&M Society. The process of submission and timing of these papers are coordinated with the Editors-in-Chief of the respective journals and posted on the I<sup>2</sup>MTC website well ahead of the conference.

## **6.0 INDUSTRY LIAISON CHAIR**

### ***6.1 General Responsibilities***

I<sup>2</sup>MTC may attract publishers, software houses, instrumentation and measurement companies, etc., to exhibit their products and to introduce new concepts and applications. If a conference elects to include exhibits, the nature of the displays, exhibit accommodations and the academic tenor must be made known to potential exhibitors.

The Industry Liaison (previously called Exhibits Chair) should be knowledgeable about the technical aspects of the Conference and should be familiar with companies which are in a position to support the conference. He works with the Conference Coordinator in selecting the exhibits area, establishing exhibiting rules and regulations, selling exhibit space, assisting in setting up exhibits and supervising exhibit activities.

Typical exhibit booth include: 1. A standard 10 x 10-ft (~3 m x 3 m) area with back and side drapes and power source, and 2. A 6x8-ft table-top display for literature or other products where an electrical power source is not required.

A detailed budget will list the price of each booth space and estimate the number of booths that may be sold. It should indicate the cost of the gross exhibition area and facilities, the cost of electrical power, decorator service, signs, drayage (short distance transport cost) and warehouse services, security guards, insurance and the cost of sales (promotion, printing, mailing, telephone, etc.). The budget may also include the cost of one full Conference registration per exhibiting organization. However, it is **explicitly** mentioned here that this type of registration does **not** provide the exhibitors the possibility to present and publish (proceedings of) regular technical papers at the conference, similar to those scheduled for oral/poster presentation and appearance in the IEEE Xplore.

The Industry Liaison will provide IEEE with exhibits information (number of exhibitors, estimated value of displays, and number of exhibit representatives present) to incorporate exhibits coverage in the conference insurance.

Exhibiting at I<sup>2</sup>MTC is covered by contract and is limited to instrumentation and measurement products and services. I<sup>2</sup>MTC excludes exhibiting companies, organizations, and/or publications whose activities directly compete with IMS publications or conference activities.

### ***6.2 Application and Layout***

The Industry Liaison is responsible for obtaining the exhibits application and rules and

regulations contract from the Conference Coordinator and recommending any changes to fit the conference site. In advance of the conference, the Conference Coordinator sends a message to exhibitors with this information:

Time and location of the conference, general attendee profile, preliminary plans, days and hours of exhibiting and cost per booth.

A copy of the exhibit and rules and regulations.

### **6.3 Setup and Teardown**

The Industry Liaison Chair is responsible for supervising exhibit setup and addressing any problems that may arise during that time.

## **7.0 TUTORIAL CHAIR**

### **7.1 Role of Tutorials**

Applications workshops featuring state-of-the-art information on instrumentation and measurement technology offer another dimension to I<sup>2</sup>MTC activities. Tutorials are presented in the first day of the Conference (Monday) to avoid any conflict with I<sup>2</sup>MTC sessions. Individuals who have paid full registration fee may attend the tutorial free of charge.

### **7.2 Partnership with Conference**

The Tutorials Program falls under the Education Committee's responsibilities and is managed by the IMS Vice President for Education who appoints a Tutorials Chair. However, the organizing Committee may also appoint an additional Tutorials Chair. These two will then work closely to manage all aspects of the Tutorials Program. The Tutorial Chair(s) work closely with the Technical Program Chair(s) to create a Call-for-Tutorial Proposals. Subjects are selected to further knowledge of issues that will be discussed in detail at I<sup>2</sup>MTC. The Conference Coordinator maintains a list of individuals who have previously committed to present a tutorial but did not appear, and keeps a current and running spreadsheet of such names..

Tutorials are regarded and advertised as the first day of the conference. Full conference registration includes registration for all of the tutorials. At the discretion of the Organizing Committee, a "one day" tutorials only registration may be offered. I&M AdCom considers the tutorial program to be a platform for inviting industrial involvement in I<sup>2</sup>MTC, and as such tutorials should be included in the Continuing Education Unit and Professional Development Hour (CEU/PDH) credit program offered by I<sup>2</sup>MTC. Recent history suggests that tutorial attendance should be expected at about one third (33%) of the full conference registration numbers. To effectively use the CEU/PDH program, there is a need to promote the availability of CEU/PDH credit to a wider audience. The typical individual needing CEU/PDH credit is a registered (chartered) engineer in US or Canadian practice (P.E. or P. Eng., respectively).

Opportunities to improve the tutorial program include schedule and promotion ideas. In order to more effectively advertise the program, the following schedule is suggested for organizing the tutorials program:

- Identify tutorial speakers by end of November
- Identify tutorial titles by end of December; publish titles, presenters, and tentative schedule

- on I<sup>2</sup>MTC conference website by end of December.
- Complete all presentation materials and copyright assignments by end of March.

## **8.0 ARRANGEMENTS CHAIR**

### **8.1 Overview**

The Arrangements Chair, with assistance from the Co-Chairs, is responsible for recommending appropriate hotels, assisting the Conference Coordinator with hotel reservations, and arranging and supervising meeting facilities, including evaluating meeting rooms for acoustics, ceiling heights, and air conditioning, as well as coordinating social activities, meal functions, and food guarantees. The Chair and Co-Chairs work closely with the Conference Coordinator to provide input on meeting rooms, luncheons, Gala Dinner venue, exhibit hall, registration area and any other facility within the hotel. They specify the required equipment and supplies and handle audio-visual needs, coordinate any Conference-controlled hospitality activities, obtain necessary tables and chairs and coordinate overnight storage of cash boxes, computers and valuables.

Contract negotiations with the Conference facility are conducted by the office of the Conference Coordinator. All arrangements-related contracts are approved by the Arrangements Chair, the Conference Coordinator and by IEEE Conference Services before signing. A final version of the contract must be submitted to IEEE Contracts Department.

It is important to note that the I<sup>2</sup>MTC Board of Directors must approve in advance any commitment of funds exceeding \$3,000. The Conference Coordinator has been authorized by the I<sup>2</sup>MTC Board to act as its agent in this process and must be consulted before major commitment of funds is made. These commitments include, but are not limited to, hotel/facility contracts, social and special events.

In most cases, hotel meeting room rental fees are based on the number of sleeping room nights recorded and fees are reduced or waived if certain levels are achieved. For catering planning, a general rule of thumb: meal guarantees should be based on a rate of 85% of Conference registrants the first day, 90% the second day and 70% the third day.

While the Arrangements Chair coordinates operational matters with the facility, only the General Chair and the Conference Coordinator may authorize instructions to the facility and changes to existing specifications during the conference, as well as any conference-charged expense at the host hotel.

### **8.2 Support of Technical Program**

Working with the Technical Program Chair(s), General Chair, Tutorials Chair(s), and Conference Coordinator, the Arrangements Chair(s) determines at least one month in advance the needs of the various speakers for audio-visual or other equipment. This can include lavalier or podium microphones, lecterns, laser pointers, blackboards and screens. The Arrangements Chair should make certain there are pads, pencils, water and glasses in the session rooms. Whenever possible, session rooms should be set classroom style. The Arrangement Chair arranges for signs — at the registration desk, the entrance(s) to the exhibit area, at the door to session rooms and where other directional indications are needed (the number of signs is determined by the Arrangements Chair in consultation with pertinent chairs.) Signs should be determined 30 days in advance to avoid at-

conference confusion and extra work in a time-critical period. Even with careful planning, there are last-minute changes, and a sign-making computer program should be available to handle these emergencies. The Arrangement Chair makes certain the conference is listed on the hotel or facility meeting board and outside marquee for the day(s) and checks their accuracy each morning.

The Arrangements Chair or the designated alternate must be available at all times during the conference to make certain arrangements are carried out, to verify all ordered equipment is operating properly and to handle any emergency that might arise. The Arrangement Chair is responsible at the end of the Conference to ensure that all equipment is returned promptly, to personally check bills for submission to the Finance Chair and to thank suppliers (hotel, decorator, etc.) for their support.

It is difficult to estimate beforehand which sessions will draw greater attendance. Try to select facilities that offer flexibility in meeting room size. It is a real advantage to be able to expand a room set for 50 people to accommodate 75, or to reduce the room size if attendance is smaller.

### ***8.3 Sleeping Rooms***

In the US, a block of sleeping rooms must be booked in the Conference headquarters hotel to accommodate out-of-town attendees. Must be careful to not obligate the Conference in a contract for more hotel rooms than I<sup>2</sup>MTC history indicates are needed as such action could have a negative financial impact if the room count falls short. The growth of on-line hotel reservation services has had an effect on the number of sleeping rooms used at the headquarters hotel. Lower rates can draw conference attendees away from the main hotel. It is strongly recommended that an agreement be sought with the hotel to review reservations prior to the Conference as some Conference attendees may book rooms without advising they will attend I<sup>2</sup>MTC. It is suggested to book a small number of overflow rooms in a nearby hotel (or have an arrangement with the headquarters hotel for overflow) in the event of a larger-than-anticipated crowd. Normally, unreserved sleeping rooms are held until 30 days before the conference and then are released to the general public. Attendees attempting to reserve rooms after that date are handled on a first-come, first-served basis. The Conference Coordinator handles all sleeping room requirements and associated contract with host hotel.

When the conference is held outside of the US, there is ideally a host hotel selected which is close walking distance to the main conference venue (if different from the hotel). When possible, a sufficient number of guest rooms should be reserved to accommodate the IMS AdCom and conference attendees.

In a special category are members of the I<sup>2</sup>MTC Conference Committee, the I&M AdCom, top IEEE officials and keynote speakers. The Conference Coordinator supplies names of these people to the hotel so they can be placed on a VIP list to be assured upgraded accommodations, when possible.

### ***8.4 Social Functions***

Social functions require the Conference Coordinator to schedule luncheons and receptions and pick the menu, in coordination with the Arrangements Chair, and deal with tickets to functions – it is critical to collect meal tickets from attendees during meal functions as they can be used to verify served meal count. Most hotels require a guarantee of 72 hours in advance of the number of meals to be served. Guarantee on a conservative basis; the hotel prepares for 5% more than the guarantee. Remember, attendance drops after the first day and be aware some attendees skip meal functions altogether. There is no foolproof rule of thumb, although many meeting planners guarantee 85% of

total registrations the first day, 90% the second and 70% the third.

It is mandated to serve the Gala Dinner meal as served plated meals rather than buffet meals. However, buffet-style meals are customary for conference lunches. This controls portion size and reduces waste. Cost for drinks may be controlled by either limiting the time a bar is open or providing a fixed number of gratis drinks using tickets. Wine with the Gala Dinner should be served by staff to avoid waste of unused open bottles. The IEEE recommends reducing the number of meals and receptions to maintain the required income to expense ratio to deliver a 20% financial surplus. The Conference Coordinator will handle all final guarantees with the venue, working closely with the Arrangements Chair. Also, see Section 14.3.8.

## **8.5 Operational Support**

The Arrangements Chair meets with hotel convention services, sales and catering personnel prior to the Conference to review all event orders and to advise of special circumstances, including, but not limited to:

1. the large number of foreign visitors whose familiarity with the local language may be poor,
2. the need for the concierge desk to be prepared to answer extra tourist questions and
3. anticipated traffic for hotel public facilities such as restaurants.

Hotels usually have business centers with photocopiers, fax machines, computer printers and e-mail facilities.

The Arrangements Chair assists the Industry Liaison Chair with layout of the exhibit hall, power sources, tables, drapes and other needs. The arrangements Chair arranges for coffee service at the morning break and a coffee and soft drink break at mid-afternoon — and he makes certain there are sufficient refreshments for all on hand (coffee breaks generally are paid for by the conference, although the Industry Liaison Chair should invite exhibitors to host a coffee break — and receive appropriate recognition.)

Working with the Conference Coordinator, the Arrangements Chair handles arrangements for any related non-conference meetings, such as the I<sup>2</sup>MTC Board of Directors, Society AdCom, technical committees or special project groups. The Conference Coordinator is the primary contact for meeting information regarding the I<sup>2</sup>MTC Board of Directors and Society AdCom. Technical committees should be contacted via the Society Technical and Standards Activities Chair in advance to determine any meeting needs. It is advisable to have several spare meeting rooms to accommodate technical and other committees of the I&M Society which may hold meetings in connection with I<sup>2</sup>MTC – and in many cases these groups ask for meeting space at the “last minute.”

## **9.0 REGISTRATION CHAIR (optional - usually the duty of the Conference Coordinator)**

### **9.1 General Information**

The Registration Chair supervises at-door registrations, oversees the sale of Gala Dinner and meal tickets, and any special packages such as social and spouses' tours (hotels, chamber of commerce and tourist bureaus can provide information on such packages). The Registration Chair teams with the Conference Coordinator who collects advance registrations, processes fees and manages the registration process.

Full IEEE member, non-member, and Life-member registration includes admission to all technical sessions and the exhibits, if any, and tickets for conference-sponsored luncheons, receptions and Gala Dinner. Student registrations include admission to all technical sessions, lunches and welcome reception, including the Gala Dinner tickets.

**Registration fees are set by the I<sup>2</sup>MTC Board of Directors. The local committee CANNOT independently change rates or institute additional admission tiers.** Complementary registration (or admission) may be granted by the local committee as allowed by the I<sup>2</sup>MTC Board as part of an Exhibitor or Patron benefit. If a financial contribution is allocated to the local IMS section, any additional complementary registration (admission) granted by the (local) organizing committee will be charged against and will reduce the allocation granted by the I<sup>2</sup>MTC Board to the local committee for services. For example, a complementary admission at the door of a non-member will reduce the \$10,000 (USD) allocation by \$907.50 (USD) to \$9,092.50 (USD) to the local committee. This is only an example – the actual numbers are dictated by the budget submitted and approved by the board.

IEEE requires that there will be two levels of registrations – IEEE members (IEEE member rates are extended to co-sponsoring or participating organizations), plus a relatively small number of students and IEEE Life Members entitled to lower registration rates, and non-members. The differential for non-members is equal to basic IEEE annual dues. Advance registrations in all categories are 20- to-25 percent lower than late registrations. Cutoff dates for advance registration are usually six weeks prior to the Conference.

Categories include IEEE member advance, IEEE member late/onsite, IMS member advanced, IMS member late/onsite, non-member advance, non-member late/onsite, student/Life member advance, student/life member late/onsite. The Instrumentation and Measurement Society AdCom has required that IMS members be given at least a \$30 (USD) discount below IEEE members.

I<sup>2</sup>MTC policy requires that there be a full fee registration connected to every paper presented at the conference. If a student or Life Member is the only author of a paper attending, they will be required to pay full registration. Student/Life Member rates are allowed when there is a co-author present who has paid full registration. Authors presenting up to 2 additional papers without a co-author registered are required to pay an additional paper fee of \$100 for each additional paper. Authors presenting more than 3 papers must pay an additional full registration for the 4<sup>th</sup> paper, \$100 for the 5<sup>th</sup>, etc. In the case which no registration has been received and correctly processed to cover the paper publication, the conference organizers will contact the authors before the paper is removed from the proceedings.

The Registration Chair and the Conference Coordinator will determine if attendees receive registration bags. Attendees receive badges, holders, Gala Dinner and luncheon tickets, and tourist material from the host city or its tourist agency, if available. Registration prepares packages for VIP attendees and, if pertinent, secures "exhibits only" credentials for guests invited by exhibitors. Conference receipts and certificates of participation are provided to attendees by the Conference Coordinator, as requested. Proceedings are distributed to attendees electronically.

The Conference Coordinator coordinates with the host hotel venue to compare conference registrations to hotel reservations.

The Conference Coordinator arranges for personnel to load registration packages before the conference and support onsite registration. He ensures there are sufficient chairs and tables, signs, computers/printers, pens, registration cards, etc. He arranges the use of a hotel safe deposit box for cash and financial records received. It is a nice touch to have a sign and a container at registration asking attendees not planning to use luncheon or Gala Dinner tickets to donate them for

use by students.

## **9.2 Registration Desk**

The registration desk is staffed throughout the Conference by the Conference Coordinator and personnel to accommodate onsite registration. There should be at least two PC-compatible computers and two printers. The first day of the Conference registration should open at 7 a.m. It should be open all day the first two days of the Conference and until noon of the final day (the registration area also serves as an information center. The desk is staffed by two or three persons (it may be desirable to increase the number of people staffing the registration desks during the peak registration periods to move attendees through the process promptly - it creates an excellent impression). A space is maintained for pre-registrations where attendees pick up their prepared materials\*.

The Conference Coordinator carries out the following:

- Hands out badges and materials for advance registrations.
- Accepts completed registration forms and fees for onsite registrants.
- Prepares badges and presents badges, luncheon and Gala Dinner tickets to registrants.
- Receives payment and makes a receipt for each transaction. Payment may be made by check, bank transfer or credit card – Visa, MasterCard and American Express. The Conference Coordinator is responsible for keeping accurate and current financial records.

## **9.3 Registration Form**

An online registration form is made available on the website. The form varies little from year to year with changes essentially in fees and the location, dates and special activities. This allows consistency and continuity and ease of handling.

## **9.4 Handling Funds**

It is the policy of I<sup>2</sup>MTC to only accept credit card payments on site. The Registration Chair should be available at all times to answer questions and handle emergencies. Approval of the Registration Chair is required for issuance of complimentary passes for the working press, furnished upon presentation of credentials. After the conference, the Conference Coordinator prepares a list of attendees and their full addresses, phones, and e-mail addresses. Copies are furnished to IEEE Headquarters. Upon request, a copy may be given to exhibitors, including only those attendees who have authorized data transfer.

## **9.5 Supplemental Tours and Activities**

The Arrangements Chair is responsible for non-conference social activities. Tours, shopping guidance and other programs are available through the hotel concierge, a local tourist bureau or a commercial

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*\*Instruct registration staff to obtain **full** addresses, telephone and e-mail addresses from each registrant. Almost all large companies and all universities have mail stations or departments and will not deliver mail unless such information is contained. This policy doesn't apply to small companies or home delivery but please make certain registration looks over cards to make certain they are complete.*

company - and an announcement of availability should be made well enough in advance so an appropriate paragraph may be included in the advance program and other announcements. A guiding principle: All tours and social functions should be self-sustaining. The Registration Chair should have a menu of activities to help visitors make arrangements to take part on an individual or group basis.

## **10.0 FINANCE CHAIR**

### ***10.1 General Information***

The Finance Chair is the chief financial officer and controller of the I<sup>2</sup>MTC event. The Finance Chair teams with the Conference Coordinator who maintains the Conference bank account and has in place a system for safeguarding and accounting of all funds received prior to the Conference from pre-registrations, exhibits fees, tutorials and advances from sponsors and for monies received during the conference from registration fees and ticket sales. The Finance Chair is responsible approving all budget submission updates to IEEE as well as the final financial accounting, in collaboration with the Conference Coordinator..

An Excel spreadsheet has been developed to calculate the I<sup>2</sup>MTC budget based on attendance projections, function costs and fees. The spreadsheet program is available from the Conference Coordinator.

"Seed" money may be needed to meet conference expenses before registration and before exhibits funds become available (if applicable). Advance funds are provided by the IEEE I&M Society. Terms of financial participation by a host IEEE Section or I&M Chapter should be defined in a MOU prior to bidding for the conference. The Finance Chair, with the Conference Coordinator, must request these funds through the Treasurer of the Society and any co-sponsor. Advance funding should be returned to the sponsors as soon after the conference as possible.

The Finance Chair and the Conference Coordinator will develop a budget to indicate all anticipated receipts and expenditures (to be approved by the General Chair) and will provide that budget to the sponsor and co-sponsors. Budgets will be no less than monthly and submitted to the I<sup>2</sup>MTC Board of Directors and IEEE, upon request. The conference will budget for a surplus 20% to 35% of expenses. However, a minimum surplus of 20% is required by the IEEE rules.

If an organizing committee wishes to solicit and incorporate the assistance of an IEEE Local Section/Chapter in the organization of the conference the process/rules outlined in the Appendices Section (titled: **Financial Involvement of Local IEEE Section/Chapter**) must be strictly followed.

### ***10.2 Bank Account***

Per IEEE rules, a Concentration Bank Account will be set up for the Conference in the IEEE Bank (US). The Finance Chair will work with the Conference Coordinator to handle funds received and to disburse payments. The Finance Chair and the General Chair may receive a conference credit card which is connected to the Concentration Bank Account. The default monthly credit limit is \$5000. A credit limit may be requested by the Conference Coordinator, as needed. All payments made by credit card must be approved in advance with a compliant invoice provided., Local bank accounts are prohibited unless required by laws of the host country and specifically authorized by the I<sup>2</sup>MTC Board of Directors.

All income and expenses are coded according to a Chart of Accounts, which align with the conference budget.

## 10.3 Insurance

The Conference Coordinator are responsible for ensuring insurance coverage (through IEEE) for the conference to protect I<sup>2</sup>MTC and its sponsors from accident claims or losses. Conference Insurance is automatically set up with the submission of the Conference Application -

- Bonding of conference officers and employees - \$1,000.00 (USD) (\$2,500 (USD) deductible)
  - Rental of equipment - \$25,000 (USD) limit (\$250 (USD) deductible)
  - Liability and property damage - \$1,000,000 (USD) and \$7,000,000 (USD) (no deductible)
  - Limited volunteer personal liability - \$100,000 (USD) (list committee members covered)
- In-and-out robbery coverage - \$25,000 (USD) limit and \$2,500 (USD) deductible) is available through IEEE at a cost of \$125 (USD).

The IEEE requires that a Conference must obtain in advance a certificate of insurance from a company providing buses for tours or other transportation activities. The certificate must specify the liability and property damage coverage provided by the company and must name IEEE as an additional insured. The certificate is to be filed with the IEEE insurance office.

A Conference may not charter boats in the name of IEEE as IEEE liability insurance does not apply to boats. If such transportation is needed, arrange for the carrier to sell the Conference individual passenger tickets – it is merely a coincidence that every passenger on a particular boat ride is attending the same Conference. If ticket transportation cannot be arranged, the Conference must secure a certificate of insurance from the carrier naming IEEE as an additional insured with a minimum coverage of \$1 million. IEEE recommends caution in such charter arrangements because of the potential liability. Airplane travel as part of a conference event is **not** authorized.

## 10.4 State Tax Exemption

Some states of the United States allow sales tax exemptions for IEEE conferences. If I<sup>2</sup>MTC is held in a state where an exemption is allowed, the Conference Coordinator must provide the conference facility and other suppliers with a sales tax exemption certificate.

## 10.5 VAT

Currently, many countries outside the US include VAT implications. For most countries, IEEE International LLC, the indirect tax compliance entity associated with IEEE, has an established office/representative in the relevant country. IEEE International LLC should be utilized to facilitate VAT compliance in these cases. In the case that IEEE International LLC does not have an establishment in the relevant country, the conference is responsible for engaging a local entity (Professional Conference Organizer, University, IEEE section) to facilitate VAT compliance. VAT is typically required to be collected in addition to the registration fees and other optional items, except for Sponsorships and Exhibits, since these are treated as “donations” from a VAT perspective. When utilizing IEEE International LLC, the Conference Coordinator will provide compliant vendor invoices and associated accounting ledgers, in the template provided by IEEE, at the relevant intervals (typically monthly), to the IEEE Indirect Tax Office for processing. The debits/credits are then made to the IEEE NextGen conference bank account. With this arrangement, the conference is enabled to reclaim VAT that is paid on any local invoice, as long as the vendor invoice that is provided is fully compliant and is submitted with the corresponding ledger at the required submission interval.

## **10.6 Payment of Bills**

Bills should be approved by authorized committee chairs and forwarded to the Finance Chair for approval and then to the Conference Coordinator for payment. While every effort must be made to stay within the budget, the Finance Chair may approve any bill authorized by the appropriate chair which does not exceed a committee's specific budget by more than 10 percent (larger excesses must be approved by the General Chair and in certain cases, the I<sup>2</sup>MTC Board of Directors).

## **10.7 Refunds**

The Conference Coordinator will recommend a policy for registration refunds for approval by the Finance Committee. Refunds can be held to a minimum if a cut-off date for refund requests is publicized in appropriate promotional literature. Requests for refunds after the deadline date will not be honored. Refunds should be avoided if possible but a recommended policy is 100 percent refund 30 days before the conference. Fewer than 30 days no refunds are authorized except in documented medical or family emergencies.

## **10.8 Award Recipients**

If a conference presents a cash award exceeding \$600, payment must be reported to the IRS on Form W-8 (non-US resident) or W-9 (US resident). This covers payments to individuals or unincorporated businesses for prizes and awards. Such payments are considered taxable income to the recipient and are required by law to be reported. Each conference making such payments must provide a list to the IEEE Accounts Payable Department by January 10 of the year following payment. The IEEE Accounts Payable Department will file all the necessary 1099s on behalf of the Institute.

Items included are:

1. Recipients Social Security or Employee Identification number
2. Name and home address of the recipient.
3. Sum of the total payments made to the recipient.
4. Purpose of the payment.
5. Contact information for the individual who prepared the list including name, telephone, fax and e-mail address

Types of payments to be reported:

1. Travel awards paid without obtaining an expense report with supporting receipts for invited speakers, attendees, students, etc.
2. Prizes or awards for papers, service, etc.

## **10.9 Reports and Audits**

A preliminary financial report will be filed within three months, an accrual-based account by November 30 of the conference year and a final audited report will be submitted to the Board of Directors and IEEE headquarters as soon as possible thereafter, but realistically six months after the conference. The report shall give a clear picture of the number of registrants, the fees they paid, the number of tickets sold for social events and detailed information about expenditures.

Conferences must issue final reports and close all books within one year or financial penalties will be assessed by IEEE; additional penalties will be imposed if closing is delayed.

All IEEE conferences with revenues exceeding \$250,000, and I<sup>2</sup>MTC meets this specification, are subject to a professional audit. IEEE offers auditing services for a reasonable fee or an outside independent professional may be used. Auditor selection is subject to approval of the I<sup>2</sup>MTC Board of Directors and the Conference Coordinator.

## **11.0 AWARDS CHAIR**

### ***11.1 Awards Process***

An I<sup>2</sup>MTC Conference Awards Chair may be appointed by the Conference Committee. In that case, they will coordinate with the IMS Awards Committee Chair (Vice President) to confer the Conference Best Paper Awards and the IMS Society Awards, respectively. They will provide assistance in mentioning the awards in the Conference program and coordinate publicity through the Conference Coordinator. They also present their respective awards during the Awards Ceremony. If such an I<sup>2</sup>MTC Conference Awards Chair is not appointed, the Awards ceremony presenting responsibilities rests with the IMS Society Awards Chair, and the Conference Coordinator will directly oversee inclusion of the awards in the Conference program and publicity. The Conference Coordinator collaborates with the Awards Chairs to arrange design and production of certificates and plaques for keynote speakers, committee members, award recipients, and travel grant recipients.

### ***11.2 Specific Award Participants***

The Awards Chair develops a specific list of proposed award recipients based on suggestions from other chairs. The Conference Coordinator develops an appropriate certificate design, supervises the printing of that certificate and arranges for the inscription of the certificates to be completed in advance of the conference. For the Best Paper Awards (\$4,000 as of this Handbook revision date provided by the IMS), managed by the Awards Chair and Technical Program Chairs in collaboration with the Conference Coordinator, must be used.

The standard awards given are:

1. Best Conference Paper Award – \$1,200 for 1<sup>st</sup> place (funds provided by the IMS)
2. Best Conference Paper Award – \$800 for 2<sup>nd</sup> place (funds provided by the IMS)
3. Best Student Poster Award – \$1,200 for 1<sup>st</sup> place (funds provided by the IMS)
4. Best Student Poster Award – \$800 for 2<sup>nd</sup> place (funds provided by the IMS)
5. Student Travel Awards (see below)

### ***11.3 Student Travel Grant Recipient Evaluation Procedure***

For the Student Travel Grants (\$12,000 as of this Handbook revision date provided by the IMS), the following procedure, managed by the IMS Awards Chair and Technical Program Chairs in collaboration with the Conference Coordinator, must be used.

1. The award must be advertised through appropriate channels, including on the website of the conference. In the advertisement, the criteria for the award, including the fact that priority goes to IMS student members, and how to apply, must be clearly mentioned.

2. Students must apply for this grant. As such, an application mechanism, such as a checkbox during the submission process of the paper (or some other mechanism), must be made available.
3. Once the accepted papers are determined, a list of applicants must be constructed.
4. The applicants' list must first be ordered in terms of IMS membership, with IMS members at the top of the list.
5. While still complying with item 4 above, the conference organizers may give secondary, ternary, and higher-level orderings in terms of additional parameters, such as financial need, travel cost, technical quality of the accepted paper, etc. These additional orderings MUST NOT disturb the membership ordering, i.e., at the end, all IMS members must still be on the top of the list.
6. Once the list is ready, grants must be allocated starting from the top of the list and move down the list until either the grant budget or the list itself is exhausted, whichever happens first.
7. The organizers must check that each winner is indeed a student. It is up to the organizers when this check should be performed, as long as it is done before the end of the conference.

## **12.0 PUBLICITY CHAIR**

### **12.1 General Information**

The Publicity Chair works through international, national and local media, via e-mail and the web to publicize the Conference and promote maximum attendance. The Technical Program gets the emphasis in publicity directed toward engineering technical publications, other trade journals and the web (sometimes a speaker will be emphasized in general media to gain coverage from newspapers and broadcast stations).

The Publicity Chair works with the Conference Coordinator to issue a news release and a Call-for-Papers to relevant including host (and nearby) section newsletters, as well as to local section web pages. A calendar item also should be included. The *IEEE Transactions on Instrumentation and Measurement and Open Journal on Instrumentation and Measurement* should announce a special issue of conference papers.

The I&M Magazine is an excellent outlet for information on I<sup>2</sup>MTC throughout the year, as are the local section publications. In the field of the technical press, there is the IEEE Spectrum, Electronic Engineering Times, Electronics, EDN, Electronic Design, Evaluation Engineering, Cal Lab, Test and Measurement World and others.

Local news media should not be overlooked - but it is unlikely to see reporters and cameras! The major exception would be a newsworthy speaker or topic relating to public interest. Material should reach trade journals two to three months prior to the event - an initial announcement and Call for Papers should go to the media as soon as they are mailed to potential speakers. Local news media should be contacted one week before I<sup>2</sup>MTC.

### **12.2 Mailing Lists**

The Publicity Chair will determine which special e-mail lists or other means will achieve local and spot publicity coverage. A post Conference summary with photos of one or more highlights of the conference should be mailed to the I&M Magazine and local section newsletter and posted on the web. Copies of articles and news releases should be included in a Conference final report.

## **12.3 Attendance Promotion**

The Conference Coordinator maintains lists of Society members, attendees at previous conferences and related conferences and persons who have inquired about the conference. These people receive e-mail notification of calls-for-papers, Advance Program and other developed items.

## **13.0 WEBMASTER**

### **13.1 General Information**

I<sup>2</sup>MTC has an [official website](#) – which is the gateway to all information about current, future, and past conferences. The website has basic information about I<sup>2</sup>MTC, a history of locations and dates and links to the current conference, the immediate past conference and the immediate future conference.

The Conference Coordinator operates the website within rules of operation set down by the Board of Directors.

### **13.2 Web Content**

The next-up I<sup>2</sup>MTC is the focus of the web and receives central attention. The future and the past are not forgotten but must not upstage or compete with the current conference.

*Next I<sup>2</sup>MTC* – This Conference is the next event in the I<sup>2</sup>MTC schedule and contents of the web include:

1. Conference information – location, hotel, dates, activities.
2. Call for Papers – replaced as appropriate with full technical program.
3. Conference Schedule (developing)
4. Registration and hotel reservation information and forms
5. Committee roster and contact points
6. Other events (tutorials, tours, etc.)

*Last I<sup>2</sup>MTC* – This is the immediate past event:

1. Conference information – location, dates, activities.
2. Key committee contact points

*Future I<sup>2</sup>MTC* – *What the future holds:*

1. Location and date of one-year away I<sup>2</sup>MTC
2. Committee roster and contacts
3. Call for papers
4. Scheduled activities as they develop.

## **14.0 Conference Content**

The current year I<sup>2</sup>MTC General Chairs and Technical Program Chairs are responsible for defining the day-to-day content and flow of I<sup>2</sup>MTC. However, certain elements are expected to be present

and there are best practices to be considered. Specifically, the conference contains the following elements:

### **14.1 Tutorials Day**

Contents and flow of the day are explained in the Tutorials Chair responsibilities. At the conclusion of the Tutorials Program, there will be a Tutorials and Young Professional Networking Event/Reception, the cost of which must be reflected in the conference budget.

### **14.2 Opening Day of the Conference**

The second day of the conference is the first day for formal papers. A larger audience will be present and therefore, there will be the formal opening of the conference.

#### **14.2.1 Session Chairs' Meeting**

At the conference, a meeting should be arranged each morning for the session chairs of the day (both presented and poster session chairs). At this briefing, the rules for conducting a session are reviewed along with handling of missing speakers. In order to preserve paper timing for those interested in attending specific papers, a missing author should NOT cause the next author to start ahead of time. All session chairs and authors are required to report to their assigned session room at least 10 minutes before the scheduled start of the session for any last-minute information. Session chairs must also keep track of no shows and improper author presentation.

#### **14.2.2 Welcome and Announcements by the General Chair, I<sup>2</sup>MTC Board Chair and the IMS President**

The General Chair will briefly welcome the attendees and review the conference schedule, process and rules and arrangements. Make sure to point out the first day schedule and remind session chairs to attend daily morning briefing meetings. The General Chair should ask the entire conference organizing committee to stand and be recognized, as well as making a point to thank the conference patrons. The I<sup>2</sup>MTC Board Chair and the IMS President also briefly extend their welcome on behalf of the Board and the IMS and mention if the IEEE President is at the meeting to introduce the Keithly Award Recipient. The IMS President should mention the continuous role of the AdCom in managing the affairs of the IMS, and ask that the AdCom members stand up and be recognized. The I<sup>2</sup>MTC Board Chair should ask the Board members to stand and be recognized.

Either the General Chair or the I<sup>2</sup>MTC Board Chair, must also announce that the Student Paper and the Conference Paper awards winners **MUST** be present at the Awards Ceremony (on Wednesday) to receive their awards. If they do not show up they will forfeit their awards! \_See the Appendices Section under these two awards.

#### **14.2.3 Keynote Speaker(s)**

The organizing committee will invite accomplished and well-known individuals to address the conference to set the theme for the conference. Commonly, two Keynote speakers are solicited for the event. Approval of the I<sup>2</sup>MTC Board Chair is required for all Keynote Speaker selections.

In addition, the past year's recipient of the Joseph Keithley Award (I&M's most prestigious award and an IEEE Technical Field Award) must be given a proper time slot to address the attendees with

a technical presentation (similar to a Keynote Speaker), if the recipient chooses to receive this award at the I<sup>2</sup>MTC meeting. It is up to the recipient to choose the venue in which they receive the award. This award is presented to the recipient by the IEEE President (or a designee of the IEEE).

The General Chair(s) and the Conference Coordinator must be in contact with the IEEE to ensure proper planning for the Keithley Award process and the IEEE President's attendance at the meeting.

#### **14.2.4 Presented Paper Tracks**

Presented paper sessions should be organized into tracks of related subjects. Session chairs are selected to introduce speakers, control the timing, and audience interchange of the session. It is vital that session chairs understand their responsibilities.

The committee should consider invited special sessions carefully, assuring that the special session chair can find adequate numbers of papers on the topic that meet the Technical Program Committees high standards. All papers including special sessions are reviewed in the same way.

#### **14.2.5 Poster Sessions**

Poster sessions are commonly run in parallel with presented sessions. Paper selection and review is expected to be the same quality as presented sessions. Poster session chairs need to be instructed on the rules and timing for arranging papers and removing papers from posting. At least one author is expected to be present during the entire session near their posted paper.

#### **14.2.6 Exhibits**

Exhibit hours and procedures are determined by the Exhibits Committee (consisting primarily of the Industry Liaison chair, arrangement chair and Conference Coordinator). Care should be given to providing exhibitors with access to conference participants during breaks by arranging the physical layout of the exhibits, posters, and break areas together. Prepare an exhibitor's handout to clearly communicate the rules for exhibiting, schedule for setup and teardown, and expectations for participation of those staffing exhibit booths.

#### **14.2.7 Welcome Reception**

The traditional welcome reception takes place on Tuesday (1<sup>st</sup> Conference day) afternoon. The cost should be reflected in the conference budget (as an expense). Pay particular attention to food and beverage distribution. Consider whether the reception will be treated as a meal by participants or as appetizers. Control alcohol consumption through bar hours or tickets.

### ***14.3 Day 2 of the Sessions***

#### **14.3.1 Session Chairs' Meeting (repeat of day 1 for current day's session chairs)**

#### **14.3.2 Announcements**

Briefly repeat conference information and rules for late arrivals. Go over the day's schedule including specific arrangements (timing and transportation) for the Gala Dinner. Thank staff. Make it a point to thank conference patrons.

### **14.3.3 Keynote**

Consider another keynote if the theme and opportunity permits.

### **14.3.4 Keynote**

Consider a keynote-type time slot for the winner of J. Barry Oakes Advancement Award (if the recipient has chosen to present at I2MTC and is attending).

### **14.3.5 Presented Papers and Poster Session continue as in Day 1**

### **14.3.6 Joseph F. Keithley Award Recipient Presentation and the Awards Ceremony**

Program content and format are the responsibility of the Technical Program Committee and the Awards Committee. Assuming the Joseph F. Keithley Award recipient has selected I<sup>2</sup>MTC to receive the award, they will present a keynote style presentation right before the Awards Ceremony, after which all awards are presented. The Joseph F. Keithley Award is an IEEE Field Award, and the present or incoming President of the IEEE (or a designee) presents the recipient with the award/medal.

### **14.3.7 Exhibits**

Exhibits will continue from Day 1.

### **14.3.8 Gala Dinner**

The dinner on the second night of paper sessions is intended as a social event. It is an opportunity for colleagues from around the world to meet and communicate. The dinner **must be served plated (NOT buffet style)** to control portions and minimize queues. Wine may be provided with the dinner. It is suggested that the wine be poured by serving staff to minimize waste. Entertainment should be provided, but the form and content are entirely at the discretion of the Organizing Committee.

## ***14.4 Last Day of the Conference***

Expect the conference attendance to fall off on the last day as authors who presented earlier may choose to travel.

### **14.4.1 Session Chairs' Meeting (repeat of the first 2 days meetings for current day's session chairs).**

### **14.4.2 Closing Ceremonies**

After the last session, assemble participants for a brief ceremony. Thank the participants, organizing committee, Conference Coordinators, and others for their help. Introduce the next year's I<sup>2</sup>MTC Organizing Committee and provide a few minutes for them to promote the conference.

## I<sup>2</sup>MTC Organizing Committee Agreement

As General Chair (and/or Co-Chairs) of I<sup>2</sup>MTC20\_\_\_, I/we agree to abide by this Handbook and the direction of the I<sup>2</sup>MTC Board of Directors. The following points are reiterations of the contents of the Handbook:

- Per the contract with the Board, the services of Conference Catalysts must be employed as specified herein.
- Conference registration rates are set by the Board and may not be altered by the Chair or local committee.
- The Technical Program Committee must review and approve any papers before they are presented. All presented papers must be accompanied by a full (NOT Student or Reduced Rate) registration. No single TPC Co-Chair or Reviewer can approve a paper and conflicts of interest must be avoided.
- Conference Banking must be conducted through the IEEE Concentration Banking Account, unless specific requirements deem alternate arrangements necessary. In this case, the procedure MUST be approved by the I<sup>2</sup>MTC Board of Directors.

By accepting the position of Conference General Chair (or Co-Chair), I agree to abide by these rules and bring all conflicts to the Board of Directors.

Name\_\_\_\_\_Signature\_\_\_\_\_Date\_\_\_\_\_

Name\_\_\_\_\_Signature\_\_\_\_\_Date\_\_\_\_\_

As Technical Program Chair (or Co-Chair) of I<sup>2</sup>MTC 20\_\_\_\_\_, I/we agree to abide by this Handbook and the direction of the I<sup>2</sup>MTC Board of Directors. I will assure all program elements meet the quality standards of the IEEE Instrumentation and Measurement Society by administering a fair, open review of all papers submitted. I will avoid conflict of interest with respect to any papers authored or presented by me. I will assure all papers meet minimum requirements of length, subject matter relevance, and technical content.

Name\_\_\_\_\_Signature\_\_\_\_\_Date\_\_\_\_\_

Name\_\_\_\_\_Signature\_\_\_\_\_Date\_\_\_\_\_

Name\_\_\_\_\_Signature\_\_\_\_\_Date\_\_\_\_\_

# APPENDICES

## Call-for-Special Sessions Proposals

The I<sup>2</sup>MTC Conference will provide a rich forum for the dissemination of the latest research and ideas in a wide range of instrumentation and measurement technology areas. As the flagship conference of the IEEE Instrumentation and Measurement Society, the conference is keen to disseminate state-of-the-art knowledge on specialist and “hot” topics related to the theme of the conference through dedicated Special Sessions. We welcome the submission of proposals for such Special Sessions for the I<sup>2</sup>MTC Conference.

### 1. Guidelines for Special Session Proposers

The Special Sessions should provide the conference attendees with an insight view of research topics that are not covered by the regular tracks. They can also be focused on particular research niches within the greater topic of a regular track; however, such sessions must offer sufficient diversity from the main topic. Therefore, the proposers are invited to highlight the difference between the contents of their submission and the regular tracks.

The Special Session organizers are encouraged to solicit an invited paper/presentation to open the Special Session, though this is optional. Special Session Organizers are expected to operate within their professional networks to promote their session and I<sup>2</sup>MTC. Having an invited paper/presentation will help to attract more interest, hence it is strongly encouraged. Accepted special sessions will have 4-6 oral presentations (the number of presentations is dependent on submission numbers and if there is an invited presentation). A Special Session can be one of the following:

- **Special Session with an invited presentation**  
The organizers invite a leading researcher on the topic of the Special Session who will provide an oral presentation at the start of the Special Session. The organizers provide the name of the presenter together with an email confirming their acceptance and an abstract. No full paper is requested, nor will the abstract be published in IEEE Xplore.
- **Special Session with an invited paper**  
The organizers invite a leading researcher on the topic of the Special Session who will provide an oral presentation at the start of the Special Session. The organizers provide the name of the presenter together with an e-mail confirming their acceptance. The presenter, together with possible co-authors, prepares a full paper and submits it to the IEEE I<sup>2</sup>MTC conference by the stipulated deadline. The paper will be peer-reviewed and must reflect an innovation providing a significant novelty to the state-of-the-art in its (sub)field. The paper, if accepted and presented, will be published in IEEE Xplore.

***Note:** An invited paper/presentation can be allocated a double time slot; however, this must be first discussed with the Special Session Co-Chairs and/or the Technical Program Co-Chairs.*

- **Special Session without invited paper/presentation.**  
An invited paper/presentation is not compulsory for a Special Session. A Special Session without an invited paper/presentation can be a collection of submitted papers (oral and poster) on a special topic. All submissions will be peer-reviewed. Those that are accepted and presented will be published in IEEE Xplore.

***Note:** No financial assistance is available from the conference to support the participation of the presenter of an invited paper/presentation. The Special*

*Session Organizer and all presenters in the session are required to register and pay for the conference.*

## 2. Special Session Proposal Contents

Special session proposals should be a maximum of 2 pages and must address the items listed below:

- **Special Session Details**
  1. Title of the Special Session
  2. Significance of the topic
  3. Special Session organizer's name, affiliation, and a short CV (3 pages max for CV)
- **Invited paper/presentation Details (optional)**
  1. Title
  2. Authors and their affiliation
  3. Abstract
- **Reviewers**

Please provide details of reviewers who may be able to help review papers for the proposed Special Session. A suitable list of willing reviewers (name, affiliation, e-mail) will be required and should be provided by the Special Session organizer before the start of the review process.  
*(The list of reviewers in the Special Session proposal is optional at the time of submission.)*

## 3. Special Session Proposal Timelines and Process

- **Proposal submission date:** xxx
- ***To submit a proposal for a Special Session, the Special Session organizer should send their proposal by e-mail to the two Special Session Co-Chairs.***

### ***Process for I<sup>2</sup>MTC Best Student Paper Award (Delivered as a Poster)***

1. In the Call-For-Papers (CFP) and website announcement mention that any student who wishes to have his/her paper be considered as a candidate for the Best Student Paper (through a Poster competition), should indicate so when the Proceedings Paper is submitted via the EDAS submission system. The EDAS system has been updated so that they can just click and these papers will be grouped accordingly and handed over to the Technical Program Committee.
2. These papers MUST be *primarily* the work of the student even if there are multiple co-authors involved. The student MUST present the poster at the conference.
3. The Technical Committee Co-Chair(s) will solicit and make up a team of five reviewers who will only review these Proceedings Papers.
4. If too many papers are submitted for this competition, then select more reviewers to be in this team. This reviewing team must be technically diverse and as much as possible have technical overlaps into several areas, since I<sup>2</sup>MTC is rather diverse technically.
5. The Technical Committee Co-Chair(s) will provide the review committee with *basic* guidelines for selecting the best student poster candidates from the submitted Proceedings Papers to include technical quality, topicality, significant student authorship participation, etc.
6. Subsequent to this review, a maximum of ten Proceedings Papers should be selected as final candidates. Any Proceedings Paper not selected for this competition will become part of the regular program of the conference (assuming all other submission requirements are met).

7. **These ten will be delivered as Poster presentations.** This must be announced at the time of Call-For-Papers so that the potential students are aware. These will **not** be any different than any other poster or oral papers that may be presented at the conference, in that they will have their Proceedings Paper published in the IEEE Xplore and can likewise submit an extended Special Issue Paper to the Transactions.
8. At least one of the regular poster sessions must be scheduled for Tuesday of the conference, during which these Student Best Posters candidates will also be scheduled and presented.
9. The TPC will solicit and select five judges from among the initial reviewers (some may change if they do not attend the conference) as on-site Best Student Poster Judges. One will be appointed as the Chair of the selection committee, to facilitate the process and act as the point-of-contact. They will then walk through the poster session (without any indication that they are judging papers) see the posters, watch the students answer questions, they ask questions themselves, etc. In this way, the judges will be able to examine the other aspects of students' abilities such as interacting with attendees, effectiveness of responding to questions, knowledge of the work done, etc. and can more effectively and comprehensively rank each student poster.
10. Then, based on several key parameters (poster outline, clarity, technical quality of work, ability to answer questions effectively, knowledge of the field, etc.) they rank the posters. Soon after the poster session they will get together and select the Best Student Poster, Runner-Up and an Alternate based on their overall ranking.
11. The information about the winners (Best, Runner-Up and Alternate) will be given to the IMS Operations Manager (or the person in charge of this task) so that a certificate can be printed for Wednesday Awards Presentation when the Chair of the selection committee announces (briefly) the selection process and the winners. A total of \$2,000 (\$1,200 & \$800) is provided by IMS for best paper awards. Payment is made post-conference via Concur.
12. Note that each judge will be recognized at the Awards Presentation and they may indicate this volunteered activity in their CVs (if they wish)!
13. A process of this kind ensures that these papers are selected based on a transparent and objective set of metrics and criteria. In addition, since the process involves several down- selection steps and reviews, we will have built quality into the process and the papers we select. This uniform process also assure consistency regarding these awards, from one year to the next (something that has been lacking in past years!).
14. **IMPORTANT NOTE:** In the CFP and in the EDAS system (where a student chooses to enter his/her paper for this competition) it **MUST** be clearly stated that student author of the paper must be present at the Wednesday Award Ceremony in order to receive the award, otherwise the award will be given to the next highest-ranking paper (this is to avoid the embarrassing situation of announcing a winner who is not present to receive the award!).
15. To this end, the following statement must be added to the CFP: "Students who competed in the Best Student Poster Competition, MUST personally check-in with the Operations Manager by no later than 10:00 a.m. on Wednesday confirming their attendance at the Awards Ceremony." Failing to do will result in forfeiting the award. In that case, the award recipient order will change based on the ranking determined by the Selection Committee.

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□ - I2MTC does not distinguish between oral and poster delivery mode of a paper. All accepted papers, no matter what the delivery mode at the conference, are eligible to be published in the IEEE Xplore as long as they satisfy other pertinent requirements (payment of full registration fee, presentation at the conference, etc.).

## ***Process for I<sup>2</sup>MTC Best Conference Paper Award (Delivered as a Poster or Oral)***

The Conference Best Paper selection process is much the same, but with slight differences in some respects.

1. In the Call-For-Papers (CFP) and website announcement we will mention that the Conference Best Paper Award will be selected based on the initial review process of the Proceedings Papers followed by visitation (by judges) during the presentation (oral or poster) of candidate papers.
2. The reviewers of all papers will be asked (in the EDAS system which must be set up for this) to: a) indicate whether the paper they are reviewing should be considered in the pool of Conference Best paper and briefly state why, and b) for this *particular purpose* give the paper a ranking of 1-5. Then, based on the ranking, **up to ten of the highest-ranking papers** will be selected.
3. TPC Chair(s) select and form a group of five “knowledgeable” people to review the Proceedings Papers of these selected papers. In this way, reviewers in the specific areas of these papers can be selected to look over the Proceedings Papers and then rank each the same way from 1 to 5. One of the members should be appointed as the Chair of the selection committee to facilitate the process and act as the point-of-contact for the committee. This committee then will select up to five final candidates from these papers.
4. The TPC Chair(s) should solicit and make up a team of five judges (who will be attending the conference), some of whom may be involved in the previous ranking processes. These judges should, as much as possible, have some expertise in the areas of these papers and also be from a diverse group from other aspects than just technical (i.e., academia vs. industry, IEEE regions, etc.)
5. The TPC should schedule these five papers during Tuesday of the conference. Each judge will be asked to attend at least three of the oral or poster presentations (without any indication that they are judging papers). As much as possible, try to mix and match this so that there is a good and fair distribution of visitations.
6. If ALL of these five papers are ORAL, then as was in 2019, they may be scheduled as a group in one session to make it easier for the judges to evaluate them. However, if one or more is a POSTER, then this may not be a good approach. This decision is at the discretion of the TPC and the selection committee. In any case, the identity of these five papers must remain strictly confidential.
7. Then, based on several key parameters (technical quality, presentation clarity, ability to answer questions effectively, knowledge of the field, effectiveness of presentation, etc.) they rank the papers. The selection committee may use the following as a uniform set of guidelines for this purpose:
  - a - Significance of the work
  - b - Quality of measurement/instrumentation methodology
  - c - Innovation/novelty of the work
  - d - Experimental results and potential impact
  - e - Quality of the presentation
  - f – Q/A performance of the presenter/author

Please note these are just guidelines, and may be modified by the selection committee, if deemed necessary.

8. On Tuesday afternoon, the selection committee convenes and looks at the rankings and selects the Best Conference Paper and the Runner-Up.

9. The information about the winners will be given to the IMS Operations Manager (or the person in charge of this task) so that a certificate will be printed for Wednesday Awards Presentation when the Chair of the selection committee announces (briefly) the selection process and the winners. A total of \$2,000 (\$1,200 & \$800) is provided by IMS for best paper awards. Payment is made post-conference via Concur. A process of this kind ensures that these papers are selected based on a transparent and objective set of metrics and criteria. In addition, since the process involves several down- selection steps and reviews, we will have built quality into the process and the papers we select. This uniform process also assure consistency regarding these awards, from one year to the next (something that has been lacking in past years!).
10. **Note:** The Awards judges will be recognized at the Awards Presentation and they may indicate this volunteered activity in their CVs (if they wish)!
11. **IMPORTANT NOTE:** The winners **MUST** be present during the Awards Ceremony (On Wednesday) to receive their awards. Otherwise, they forfeit their award and the award will be given to the next highest-ranking paper (this is to avoid the embarrassing situation of announcing a winner who is not present to receive the award!).

### **Financial Involvement of Local IEEE Section/Chapter**

- Requested amount not to exceed \$10K.
- Amount is an “expense” in the budget.
- Sections must assist with:
  - increasing number of:
    - attendees
    - patrons & exhibitors
  - replace paid assistance (volunteer for daily tasks)
  - advertise & promote the conference
  - etc.
- Organizers must explicitly state the type of assistance they expect to receive from Sections.
- The actual level of “assistance” must be documented, presented to and evaluated by a “Committee” consisting of:
  - one current Conference General Chair
  - one Conference General Chair from the next immediate I<sup>2</sup>MTC
  - I<sup>2</sup>MTC Board Chair or his/her Appointee (a Board Member)
- Conference Coordinator serves an advisory role to the I<sup>2</sup>MTC Board Chair (Appointee).
- Decision to approve/disapprove payment is made by the I<sup>2</sup>MTC Board based on the recommendation of the Committee.
- Payment to be distributed upon (financial) close of the Conference – in average 90 days from the conclusion of the Conference.