

**IEEE INTERNATIONAL INSTRUMENTATION AND
MEASUREMENT TECHNOLOGY CONFERENCE**

I²MTC



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 (I²MTC) 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 is to be signed by the Conference Chair(s) and the Technical Program Chair(s) in acknowledgement of agreement with the handbook rules contained herein.

I²MTC 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. I²MTC – 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. A Charter sets the policy of the Conference and a Board of Directors is the governing agent, providing primary direction, advice and counsel to the Conference Committee. 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 in a given 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. Conference Committee is composed of Conference Chairs, which plans, schedules, arranges and implements the conference. All chairs must be available during the hours of the Conference. Chairs must be reachable to answer questions, handle emergencies and generally insure 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 Catalyst) operates as paid staff, providing support and backup to each chair and maintaining a central office for administrative activities. His* 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 Coordinator. The Conference Coordinator is the agent of the Board of Directors 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: <http://imtc.ieee-ims.org> which provides full details on the Conference.

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 (I²MTC) 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 (I²MTC) 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 I²MTC Board of Directors approves a conference proposal. The Board of Directors generally meets twice a year, at I²MTC in the spring and in connection with the Society Administrative Committee meeting in the fall. Proposals for hosting I²MTC are considered by the Board at these meetings.

IEEE members seeking to host an I²MTC initiate an invitation proposal (see Bid Document) and submit it to the I²MTC Board Chair or the Conference Coordinator between October 1st and March 1st. Finalists will be notified when the 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 15th and the last Monday in May. 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, one Co-Technical Program Chair (see section 1.5), Associate Technical Program Chairs, Finance Chair and Arrangements Chair. If the Conference Committee plans exhibits, it should outline a strategy and identify potential exhibitors.
- 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 I²MTC 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. The budget should plan for a minimum financial surplus of 20% of total expenses.

The I&M Society and a local Section co-sponsor enter into a Memorandum of Agreement 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 I²MTC 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

The Conference Coordinator is paid a retainer fee. The Society loans funds for the Conference share of the fee with repayment after the Conference. The conference database is maintained in his office, as is the Conference bank account. 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 I²MTC and answers to the I²MTC Board of Directors. The Conference Coordinator's office works with all committees in helping carry out their responsibilities. Although he/she reports to the Conference Chair, the Conference Coordinator is available to all members of the Conference Committee as needed. He/she also serves as the executive agent of the Board of Directors 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 I²MTC 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 I²MTC which he maintains. He/she 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 I²MTC Board of Directors is required under the Conference Charter to approve in advance any major commitment of funds; "major" in this case is generally considered any expense commitment exceeding \$3,000. The 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. He/she must be included in decisions relating to meal guarantees during the conference.

1.5 Coordinator Activities

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

Conference 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.

Co-Chair – Shares all responsibilities of the Conference Chair and may provide background information and logistical support for selected speakers.

Technical Program Committee (TPC) Chairs - Assists in preparation and distribution of call for papers, configures and manages the web-based papers program, updates the web site 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 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 communication source for authors, maintains checklist of materials received and posts on the web and provides *Xplore* content to IEEE.

Exhibits - When exhibits are included, he/she 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 in exhibit floor layout as requested.

Tutorials - Participates in publicizing the tutorial program and developing registration form, collects registration fees and produces receipts and certificates of attendance.

Arrangements - Identifies specific needs for session and poster rooms, banquet 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, banquet/gala and companion tours. Submits all contracts to IEEE for review which involve a commitment of funds exceeding \$5,000 (USD).

Registration – Develops author and attendee forms with fees set by the I²MTC 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 audit (when revenues exceed \$250K). Assures 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 - 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.

Webmaster – 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 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 at the conference and where the required registration fees are paid may be included in the Conference Proceedings.

Conference Proceedings are provided at registration to each paid registrant and additional copies are available for purchase during the Conference.

The Technical Program Chairs and the Conference Coordinator establish deadlines for receipt of papers and assure proper preparation of papers as outlined in the author kits. The Conference Coordinator establishes a timetable with the printer consistent with the overall conference schedule. This schedule includes key dates for receipt of manuscripts, confirmation of *Xplore* compatibility, setup and final production.

The Publications Chair consults with the Arrangements Chair and 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 Publications Chair teams with the Conference Coordinator in producing the Proceedings. There are certain requirements that must be met.

- **Cover** - It may reflect the Conference theme or location. The cover must include I²MTC 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), his or her professional credentials and a general preview of his talk are listed.
- **Conference Committee** - The organization, committee officers and their company affiliations. Also identifies the I²MTC 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 mid-evening gala. A special honor or award presentation falls into this category.
- **Call for Papers** - For continuity, a call for papers for the following year's I²MTC is included.
- **I²MTC History** - Previous I²MTC s and their locations are listed.
- **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 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

Click on Conference Organizers and IEEE Master Brand.

The Advance Program is posted on the I²MTC web page approximately four 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 or on-site program is distributed to attendees at the Conference and contains a 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 Chair and Program Chair are included in the Proceedings and should also be included in the final program. Sufficient copies of the program are printed to supply all attendees and exhibitors.

2.0 CONFERENCE COMMITTEE

2.1 Composition

The Conference Committee is composed of the chairs of all committees – Conference Chair, Vice Chair(s), Technical Program Committee, Exhibits, Arrangements, Registration Finance, Awards, and Conference Coordinator. The Committee, which exists under the authority of the I²MTC 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 I²MTC

Board of Directors. Members of the Conference Committee **must** be IEEE member and members of the Instrumentation and Measurement Society.

3.0 CONFERENCE CHAIR

3.1 The Chair's Role

The Conference Chair, under the authority of the Board of Directors, is responsible for all activities and operations concerning I²MTC. His assignment is to select and supervise all committee chairs with the exception of TPC that are assigned in accordance to the three-year rotating Technical Program Committee clause at the start of Section 5.0. Conference Chair will monitor and coordinate the activities of all the committee chairs to assure events progress in a satisfactory manner. He presides at committee meetings and is responsible for their scheduling and execution. He is the chief operating officer of the Conference, reporting to the I²MTC Board of Directors.

The Chair may recommend to the Board of Directors and, indirectly, the AdCom potential co-sponsoring organizations (e.g., local IEEE section, other IEEE society) or potential "participating societies" (e.g., American Institute of Chemical Engineers, IMEKO, National Conference for Standards Laboratories, a university or university department, IEEE of Japan, AEI). Criteria for participation include utilization of participating organization's mailing lists, participation in planning and preparation and prestige. Participants must be noted in publicity, publications, programs and any other public documents. The Conference Chair will ask each participating organization to appoint a representative to attend Conference Committee meetings and take part in pre-Conference activities.

3.2 Chair's Duties

He/she is a contact point with the I²MTC 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, alternating monthly meetings of the chairs and all volunteers is acceptable. Six months away, meetings should be monthly for each as a minimum. The conference chair often is the contact with keynote, luncheon and/or banquet speakers and is responsible for invitations to such individuals. He/she 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.

He/she 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 Conference Chair, 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 30th 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 I²MTC 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 Coordinator handles all invitations to attend the conference. The Conference Chair must provide a signature and contact information to include in invitation/visa letters.

4.0 Co CHAIR

A Co-Chair may be appointed and the duties of Chair divided or shared by their mutual agreement.

5.0 TECHNICAL PROGRAM CHAIRS

Starting in 2021, a three-year rotating Technical Program Committee (TPC) Chair membership is in effect, as follows:

- 2021 – Glasgow (Kristen Donnell, Pawel Niewczas, Melanie Ooi)
- 2022 – venue TBD (Kristen Donnell, Pawel Niewczas, 2022 TPC)
- 2023 – venue TBD (Kristen Donnell, 2022 TPC, 2023 TPC)
- 2024 – venue TBD (2022 TPC, 2023 TPC, 2024 TPC)
- 2025 – venue TBD (2023 TPC, 2024 TPC, 2025 TPC)
- 2026 – venue TBD (2024 TPC, 2025 TPC, 2026 TPC)

The composition of future I²MTC TPC Chairs is based on a rotating three-year term. Each year, names of the two TPC chairs will be provided to future I²MTC bidders and they are required to only nominate the third member of the TPC in their bid. Annually, the person with the longest committee service is appointed at the TPC Chair, while the remaining two members serve as TPC Co-Chairs.

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. It must be comprehensive and balanced between papers from industry and academia. The program includes both oral presentations and poster sessions. The Program Chairs, in conjunction with the Technical Committee, choose the theme for the Conference and organize the technical sessions. They 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 Program Chairs have the right of final 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 Program Chair, may not participate in the review or approval of any paper in which they have

participated as an author or presenter. They exchange with the 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 Program Chairs cooperate with the Editor of the *IEEE Transactions on Instrumentation and Measurement* in facilitating the publication of a special issue of the *Transactions*. They make sure that session chairs complete author evaluation/attendance reports and notify the Conference Coordinator and Transactions Editor of papers not presented and therefore ineligible for the special I²MTC issue.

The Program Chairs will contact all session chairs, assist them with author/speakers, and work with the Conference Chair in coordinating technical sessions with keynote and luncheon speakers and with tutorial sessions, if any. They will determine, consulting with the Conference Committee, 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 Program Chairs will assign reviewers to each submitted paper. Reviews are returned to the Conference Coordinator and tabulated. The Program Chairs and the Technical Committee will select papers and place them in sessions. An Advance Program will be posted on the web.

The Program Chairs will select session chairs or moderators who are well known, knowledgeable in their respective fields and who will help attract an audience. The Program Chairs are responsible for briefing session chairs on their responsibilities and to encourage active participation in session development. A guide to session chairs is an effective companion to a letter confirming a chair's appointment.

5.2 Call for Papers

The Call for Papers should emphasize the theme of the Conference and the suggested topic areas (see below). 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 fee registration from one author.

The Call for Papers must 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 special issue.
- Direction that authors check the Conference website for the progress of their paper(s).
- Notice that only full 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 to avoid any embarrassment to authors). The Program Chair must prepare a clear and realistic schedule to allow time for writing, review, corrections and printing. All authors must receive acceptance or rejection notifications no later than the date stated in the call for papers.

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

5.3 Selection of Papers

Regular I²MTC 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 properly-paid Registration Fee appear in the IEEE *Xplore*.

The Program Chair and his committee will determine which papers are suitable for presentation 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 I²MTC and all papers should be in hand at least one month prior to this printing 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 subscribers. *Xplore* compatibility requires certain PDF settings and a separate submission to IEEE than the Conference Proceedings that is distributed to attendees. The Conference Coordinator is responsible for *Xplore* compatibility which requires submission of final papers in Postscript.

The author kit contains instructions to authors for preparing papers is posted on the I²MTC web.

To assure author attendance and avoid no-shows, the I²MTC Board of Directors requires that all authors/speakers pay the 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. 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 registration will cover the publication expenses of only ONE accepted paper. Authors presenting up to 2 additional papers without a co-author registered are required to pay a surcharge of \$100 for each additional paper. **Authors presenting more than 3 papers must pay an additional full registration for the 4th paper, \$100 for the 5th, etc.** For each additional accepted paper associated to the same registration, a \$100 USD fee will be charged. In the case 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 is maintained by the Coordinator and is made available to future program committees and the IEEE Transactions of I&M Editor-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.

Session chairs should contact authors in advance (at least one month prior to the conference date) of the conference to assure they will be present and advising them of audio-visual (AV) equipment

provided. Unless otherwise specified, AV equipment is limited to a computer-controlled data projector and screen, lavalier or podium microphones and pointers. Additional equipment may be ordered at the option - and expense - of the individual author.

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 chairmen 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.

Best practices for the selection of Student Best Paper (through Poster¹ competition) and Conference Best Paper Awards are provided in Appendix I, and must be closely followed.

The TPC members will familiarize themselves with and follow the relevant guidelines of the current IEEE Publication Services and Products Board Operations Manual. Each submission that is to be forwarded into IEEE Xplore is to be reviewed by at least two and preferably three reviewers. Guided by the reviewer's recommendations, the TPC will assign each submission to the categories Accept, Minor Revision, or Reject. If needed, TPCs or Topic Coordinators 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. TPCs 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 Minor Revision or Reject at the TPC'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. Thus, these general ground rules should be followed whenever possible (it is understood that some topics are the expertise of only one or two organizations and exceptions from the following rules can be made in such instances):

- If possible, avoid more than three session chairs from any one organization.
- Try to limit papers to one from any one organization in any one session.

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.

Invariably, some selected papers will not materialize. To reduce the risk of a shortage of papers in a session, an extra paper often may be selected with the understanding that paper may be moved to a poster session. A paper by an author on a past no-show list should be placed at the end of a session.

1 - I²MTC does not differentiate between Poster and Oral presentations. The only difference is the delivery mode (see Appendix I).

5.6 Poster Sessions

Papers may be placed into poster sessions in which authors explain their work to small groups or one-on-one. Papers are posted on bulletin boards - hence the name - and authors meet with attendees in front of the bulletin boards. Poster sessions carry the same technical weight as oral sessions and no differentiation is made in the Proceedings. Papers are published in the Proceedings and eligible for the special issue of the Transactions. It 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 poster authors. The Technical Committee Chair is responsible for selecting volunteers as poster session chairs. A poster session chair is responsible for assuring the following rules are followed for their assigned session.

- Posters should be hung within the assigned space at 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 throughout the session.
- All posters must be removed at the end of the session.

5.7 Conference Program

Multiple Tracks – I²MTC 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 I²MTC 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 and controversy and add contrast to technical paper sessions.

Tutorials - 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.

5.8 Special Issue of the Transactions

Production and publication of accepted and presented papers in a special I²MTC issue are coordinated with the Editor-in-Chief of the *IEEE Transactions on I&M* and, where specified, a Guest Editor.

6.0 EXHIBITS CHAIR

6.1 General Responsibilities

I²MTC 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 and the academic tenor must be made known to potential exhibitors.

The 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 is responsible for selecting the exhibits area, establishing exhibiting rules and regulations, selling exhibit space, assisting in setting up exhibits and supervising exhibit activities.

There are two types of exhibits booth: 1. A standard 10 x 10-ft (~3 m x 3 m) area with back and side drapes and power source, and 2. A special 6x8-ft 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.

The Exhibits Chair 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 I²MTC is covered by contract and is limited to instrumentation and measurement products and services. I²MTC excludes exhibiting companies and organizations in other industries.

Extra proceedings and tickets to luncheons and social events may be purchased by other exhibits personnel. If approved by the Conference Committee, additional exhibits-only tickets may be made available to exhibitors in advance to invite customers and prospects to attend.

6.2 Application and Layout

The Exhibits Chair obtains the exhibits application, rules and regulations contract from the Conference Coordinator and recommends any changes to fit the conference site. In advance of the conference, the Chair 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 Exhibits Chair is available throughout setup to handle any problems that may arise during that time. Exhibits personnel receive badges at the Conference Registration Desk.

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 I²MTC activities. Tutorials are presented in the first day of the Conference (Monday) to avoid any conflict with I²MTC sessions. Individuals who have paid full registration fee may attend the tutorial free of charge.

7.2 Partnership with Conference

The Tutorial Chair works closely with the Program Chair and the Society Tutorial Chair in selecting tutorial topics that complement and can enhance the Conference program. Subjects are selected to further knowledge of issues that will be discussed in detail at I²MTC.

The Tutorial Chair contacts selected tutorial developers for outlines of what the courses will cover and what will be involved in the presentations. He relays this information to the Technical Program Chairs and Coordinator. 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 I²MTC, and as such tutorials should be included in the Continuing Education Unit and Professional Development Hour (CEU/PDH) credit program offered by I²MTC. 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). A large audience is available through publications of NSPE, Engineers Canada, US state and Canadian provincial/territorial organizations.

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:

- Define general tutorial topics by end of October (according to conference theme).
- Identify tutorial speakers by end of November
- Identify tutorial titles by end of December; publish titles, presenters, and tentative schedule on I²MTC 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 has responsibility for recommending appropriate hotels, assisting the Conference Coordinator with arranging and supervising meeting facilities (including evaluating meeting rooms for acoustics, ceiling heights and air conditioning), hotel reservations (and social activities, including meal and food functions and guarantees). He/she works closely with the Conference Coordinator to provide input on meeting rooms, luncheons, banquets, exhibit hall, registration area and any other facility within the hotel. He/she specifies needed equipment and supplies and handles audio-visual needs, coordinates any Conference-controlled hospitality activities (such as a Conference Committee-VIP lounge), obtains necessary tables and chairs and coordinates overnight storage of cash boxes, computers and valuables. He/she works with the hotel to develop reservation policy/procedures.

Contract negotiations with the Conference facility are conducted by the office of the Conference Coordinator. The site selection, contract negotiation, and hotel coordination services must be paid by the facility so there is no financial impact on I²MTC. All contracts are approved by the Arrangements Chair, the Coordinator and by IEEE Conference Services before signing. A final version of the contract must be submitted to IEEE Contracts Department (v.feuerstein@ieee.org).

Remember, the I²MTC Board of Directors must approve in advance any commitment of funds exceeding \$3,000. The Conference Coordinator has been authorized by the Board to act as its agent in this process and he 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. These levels must be stated lower than actually anticipated. 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.

In dealing with a conference facility, it is vital that only the Arrangements Chair and the Conference Coordinator be authorized to approve instructions and to change existing specifications during the conference -- other committees should attempt to provide 24 hours of notice for any new arrangements. This arrangement helps to avoid conflicting instructions going to the facility. Further, it is critical that only the Arrangements Chair and/or the Conference Chair and Conference Coordinator authorize any conference-charged expense at the host hotel.

8.2 Support of Technical Program

Working with the Technical Program Chairs and the Tutorials Chair, the Arrangements Chair 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 Instrumentation and Measurement Society owns six computer-controlled data projectors and six laptops; they are available as needed to I²MTC. The committee should be prepared to provide a laptop computer for every data projector. 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. He 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. He/she 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 his/her 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 assure 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 have the greater attendance. Try to select facilities offering some flexibility in meeting room size. It a real advantage to be able to expand a room set for 50 people to accommodate 75 – or to pull off the reverse.

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. Be careful to not obligate the Conference in a contract for more hotel rooms than I²MTC 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 I²MTC. 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 serve basis. The Conference Coordinator handles all sleeping room requirements and associated contract with host hotel.

In a special category are members of the I²MTC Conference Committee, the I&M AdCom, top IEEE officials and the 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 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 recommended as best practice to serve conference meals as plated meals rather than buffet meals. 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.

8.5 Operational Support

The Arrangements Chair meets with hotel convention services, sales and catering personnel prior to the Conference to review banquet 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 Exhibits Chair with layout of the exhibit hall, power sources, tables, drapes and other needs. He 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 Exhibits Chair should invite exhibitors to host a coffee break — and receive appropriate recognition.)

Working with the Coordinator, the Arrangements Chair handles arrangements for any related non-conference meetings, such as the I²MTC Board of Directors, Society AdCom, technical committees or special project groups. The Conference Coordinator is the source for meeting information regarding the I²MTC Board of Directors and Society AdCom. Technical committees should be contacted via the Society Technical and Standards 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 I²MTC – 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 banquet and meal tickets, additional electronic copies of the Conference Proceedings and any special packages such as social and spouses' tours (hotels, chamber of commerce and tourist bureaus can provide

information on such packages). He/she teams with the Conference Coordinator who collects advance registrations, processes fees and manages the registration process.

Full registration includes admission to all technical sessions and the exhibits, if any, one copy of the Conference Proceedings and tickets for conference-sponsored luncheons and banquets. Life Member and student registrations may include admission to all technical sessions and a Conference Proceedings.

Registration fees are set by the I²MTC Board of Directors. The local committee CANNOT independently change rates or institute additional tiers of admission. Complementary entry may be granted by the local committee as allowed by the Board as part of an Exhibitor or Patron benefit. Any additional complementary admissions granted by the local committee will be charged against and will reduce the fee granted by the 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) fee 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 at-door, IMS member advanced, IMS member at door, non-member advance, non-member at-door, student/Life member advance, student/life member at-door. The Instrument and Measurement Society AdCom has required that IMS members be given a \$30 (USD) discount below IEEE members.

I²MTC 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, he 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 a surcharge of \$100 (USD) for each additional paper. Authors presenting more than 3 papers must pay an additional full registration for the 4th paper, \$100 (USD) for the 5th, etc.

The Registration Chair and the Coordinator will determine if attendees will receive registration bags. Attendees receive badges, holders, conference receipt, certificate of participation and banquet and luncheon tickets with the Conference Proceedings and tourist material from the host city or its tourist agency. Registration prepares packages for VIP attendees and, if pertinent, secures "exhibits only" credentials for guests invited by exhibitors.

The Registration Chair oversees an apparatus set up by the Arrangements Chair to track Conference registrations relating to hotel reservations. Many hotels will provide names of Conference reservations; this is the most effective means of monitoring progress.

The Registration Chair arranges for personnel to load registration packages before the conference and support at-door registration. He assures 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 banquet tickets to donate them for use by students.

9.2 Registration Desk

The registration desk is manned throughout the Conference by the Conference Coordinator, Registration Chair and personnel to accommodate at-door 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 manned by two or three persons (it may be desirable to increase the number of people manning 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 and a Conference Proceedings.

The Conference Coordinator carries out the following:

- Hand out badges and materials for advance registrations.
- Accepts completed registration forms and fees for at-door registrants.
- Prepares badges and presents badges, luncheon and banquet 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 Registration Chair and Coordinator are responsible for managing cash disbursements and for keeping accurate and current financial records.

9.3 Registration Form

A combined registration form – author and attendee – is posted on the web. The attendee form includes reduced fees for students and life members, the author registration does not. These forms may be downloaded and submitted by mail, fax or e-mail. 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 I²MTC 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, faxes and e-mail addresses. Copies are furnished to the Conference Chair for his final report and to next year's Registration Chair. Upon request, a copy may be given to an exhibitor.

9.5 Supplemental Tours and Activities

The Registration 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

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.

Instruct registration clerks to obtain **full addresses, telephone and fax numbers 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.*

10.0 FINANCE CHAIR

10.1 General Information

The Finance Chair is the chief financial officer and controller. He 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. With the Conference Coordinator, he submits mid-course budget figures to IEEE. He is responsible for a quarterly financial report and updating budgets and compiling a final financial accounting. He and the Conference Coordinator are responsible for submitting an accrual-based financial report to IEEE by November 30 of the Conference year.

An Excel spreadsheet has been developed to calculate the I²MTC 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, if applicable, exhibits funds become available. 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 memo of understanding 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 Coordinator will develop a budget to indicate all anticipated receipts and expenditures (to be approved by the Conference Committee) and will provide that budget to the sponsor and co-sponsors. Budgets will be updated annually and submitted to the I²MTC Board of Directors and IEEE. 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 Appendix II 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, the Conference Chair, and an executive from IEEE Headquarters are empowered to sign checks. The IEEE executive should sign checks only in an emergency. Local bank accounts are prohibited unless required by laws of the host country and specifically authorized by the Board.

All income and expenses are coded according to a Chart of Accounts

Financial records carry the Uniform Employer Identification Number assigned to IEEE conferences by the IRS – 13-1656633.

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10.3 Insurance

The Finance Chair and the Conference Coordinator are responsible for insurance coverage (through IEEE) for the conference to protect I²MTC 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 I²MTC 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 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 Conference Chair and in certain cases, the I²MTC Board of Directors).

10.6 Refunds

The Finance Chair, the Conference Chair, the Exhibits Chair and the Registration Chair will recommend a policy for registration refunds (but only after a credit card transaction is approved by the issuing agency or a check clears the bank) for approval by the Conference 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 per cent refund 100 or more days before the conference, 75 percent 75 days before and 50 percent between 30 and 50 days. Fewer than 30 days no refunds are authorized except in documented medical or family emergencies.

10.7 Independent Contractors and Award Recipients

If a conference hires an independent contractor to fulfill specific tasks or 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 rents, services (including parts and materials) 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.
3. Consultant fees paid to an individual or unincorporated business

10.8 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, sponsors 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 I²MTC 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 I²MTC Board of Directors or the Conference Coordinator.

11.0 AWARDS CHAIR

11.1 Awards Process

The Awards Chair will coordinate with the Society awards committee the conferring of any Society awards and will provide assistance in obtaining mention in the Conference program and coordinate publicity through the Conference Coordinator. He also will assure that the awards will be presented at the most appropriate gathering of the Conference.

He will recommend to the Conference Committee the type and number of awards - certificates, plaques, other mementos - to be presented, to whom and how, panel members, luncheon speakers, keynote speaker, Conference Committee members, exhibitors, etc. He or she will recommend if special framed awards (e.g., to a keynote speaker and Conference Committee) or plaques should be awarded and when. Normally, the keynote and luncheon speakers receive their awards immediately after their presentations.

11.2 Specific Award Participants

The Chair develops a specific list of proposed award recipients based on suggestions from other chairs. He assures the development of 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.

If a Conference Committee elects not to have an Awards Chair, the awards functions will be implemented by the Society Awards Chair.

The standard awards given are:

1. Best Conference Paper Award
2. Best Student Poster Award – 1st
3. Best Student Poster Award – 2nd
4. Student Travel Awards

The I&M Society provides up to \$2000 for Best Student Poster Awards and \$6000 for Student Travel Awards.

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 Coordinators to issue a news release and a Call for Papers to electronics trade journals, society magazines and newsletters and host (and nearby) section newsletters, as well as to the I&M Society, I²MTC and local section web pages. A calendar item also should be included. The *IEEE Transactions on Instrumentation and Measurement* should announce a special issue of conference papers and should draw attention to the papers when they are printed.

The I&M Magazine is an excellent outlet for information on I²MTC - 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 many others.

Don't ignore local news media - but don't expect 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 I²MTC.

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

Working with the Conference Coordinator, the Publicity Chair will develop lists of Society members, attendees at previous conferences and related conferences and persons who have inquired about the conference. These people will receive e-mail notification of calls for papers, Advance Program and other developed items. This material is supplied as well to the I&M Society, I²MTC and local section web pages.

13.0 WEBMASTER

13.1 General Information

I²MTC has an official website –<http://imtc.ieee-ims.org> – which is a doorway to all information about current, future, and past conferences. The website has basic information about I²MTC, 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 web site within rules of operation set down by the Board of Directors.

13.2 Web Operations

Each committee must designate a website coordinator to provide material to the individual conference webpage. It is critical that the website be under the direct control of the I²MTC organization, specifically the Conference Coordinator

13.3 Web Content

The next-up I²MTC 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 I²MTC – This Conference is the next event in the I²MTC 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 I²MTC – This is the immediate past event:

1. Conference information – location, dates, activities.
2. Key committee contact points
3. IEEE Book broker for proceedings

Future I²MTC – What the future holds:

1. Location and date of one-year away I²MTC
2. Committee roster and contacts
3. Call for papers
4. Scheduled activities as they develop.

14.0 Conference Content

The current year I²MTC Organizing Committee is responsible for defining the day to day content and flow of I²MTC. 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.

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

All session chairs (both presented and posters sessions) for the day should be invited to a briefing in which the Program Chair thanks them for their participation and reviews their roles. Detail to the timing of papers and the poster setup are key. Review the instructions for how to handle common issues such as AV equipment failure and presenters who do not arrive on time (or at all). Answer questions.

14.2.2 Welcome and Announcements by the Organizing Committee

It is best practice to review the conference rules and arrangements briefly. Make sure to point out the first day schedule and remind session chairs to attend daily morning briefing meetings. Make it a point to thank the conference patrons.

14.2.3 Keynote Speaker(s)

The organizing committee may invite accomplished individuals to address the conference to set the theme for the conference. It is recommended that the past year's recipient of the Joseph Keithley Award (I&M's most prestigious award) be included as one of the keynote speakers.

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 exhibits 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 is at the discretion of the Organizing Committee. The cost must be controlled to assure a successful budget. Pay particular attention to food and beverage distribution. Consider whether the reception will be treated as a meal by participants or as appetizers. If necessary, 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 attending).

14.3.5 Presented and Poster Session continue as in Day 1

14.3.6 Award Lunch

Program content and format are the responsibility of the Technical Program Committee and the Awards Committee. Arrange for a seated served lunch and expect the program to begin as lunch is finished or dessert is served. The best paper awards and student paper awards are presented here.

14.3.7 Exhibits

At the discretion of the Exhibits Committee, exhibits may continue from Day 1.

14.3.8 Gala Dinner

The optional but recommended 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 should be served plated 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 is 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).

14.4.3 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 I²MTC Organizing Committee and provide a few minutes for them to promote the conference.

I²MTC Conference Committee Agreement

As General Chair (or Co-Chair) of I²MTC20___, I agree to abide by this Handbook and the direction of the I²MTC 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 ONLY through the IEEE Consolidated Banking Account.

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 I²MTC 20___, I agree to abide by this Handbook and the direction of the I²MTC 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 _____

Appendix I

Process for I²MTC Best Student Paper² Award (Delivered as a Poster)

1. In the Call-For-Papers (CFP) and web site 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 EPapers submission system. EPapers 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 I²MTC 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 will be exclusively Poster presentations. This must be announced at the time of Call-For-Papers so that the potential students will know. 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 Executive Assistant (or the person in charge of this task) so that she can print a

2 - 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.).

certificate for Wednesday Awards Presentation when the Chair of the selection committee announces (briefly) the selection process and the winner. A check or wire transfer in the amount of \$500 and \$400 will be subsequently sent to the Best and Runner-Up awardees. This money comes from the Society and is not part of the conference budget.

12. 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 may 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!).
13. 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 Executive Assistant (currently, Ms. Judy Scharmann) 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.

Process for I²MTC 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 web site 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 EPapers 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 Technical Committee 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.
5. The Technical Program Committee 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 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 needed.

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 Executive Assistant (or the person in charge of this task) so that she can print a certificate for Wednesday Awards Presentation when the Chair of the selection committee announces (briefly) the selection process and the winners. A check in the amount of \$1,000 and \$500, respectively will be subsequently sent to the authors. This money comes out of the conference budget and is already enumerated in the budget template provided to conference organizers during the bidding process.

Note that each judge will be recognized at the Awards Presentation and they may indicate this volunteered activity in their CVs (if they wish)!

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!).

Appendix II

Financial Involvement of Local IEEE Section/Chapter

- Requested amount not to exceed \$10K.
- Amount is an “expense” in the budget.
- Amount based on a % of Surplus – 20%
- Sections must help with:
 - increasing number of:
 - attendees
 - patrons & exhibitors
 - replace paid help (volunteer for daily tasks)
 - advertise & promote the conference
 - etc.
- Organizers must explicitly state the type of help they expect to receive from Sections.
- The actual level of “help” 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 I²MTC
 - I²MTC Board Chair or his/her Appointee (a Board Member)
- Conference Catalyst serves an advisory role to the I²MTC Board Chair (Appointee).
- Decision to approve/disapprove payment is made by the I²MTC Board based on the recommendation of the Committee.
- Payment to be dispensed upon (financial) close of the Conference – in average 90 days from the conclusion of the Conference.