



Conferences Management Guidelines

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Purpose

This document is for the use of Conference Organizers interested in obtaining sponsorship by the Instrumentation & Measurement Society (IMS) for their events. It provides the guidelines, responsibilities, and policies, including fees, for managing IMS Conferences, Symposia and Workshops and obtaining IMS support.

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IEEE and IMS References

A comprehensive source of current data on setting up, running, and closing out a conference can be found on the IEEE Website

<https://ieemce.org>

IEEE Conferences useful links include:

- Guide for planning your conference:
http://www.ieee.org/conferences_events/conferences/organizers/starting_new_conference.html
- Quick Links to Required forms:
<https://ieemce.org/forms-and-templates/>
- IEEE Conference Application:
http://www.ieee.org/conferences_events/conferences/organizers/conference_application_form.html
- Conference Sponsorship:
<https://ieemce.org/planning-basics/getting-started/obtaining-sponsorship/>
- IEEE Policies (Meetings, Conferences, Symposia and Expositions):
<https://www.ieee.org/content/dam/ieee-org/ieee/web/org/about/corporate/ieee-policies.pdf#page=76>
- IEEE Conference Organizer Timeline:
<https://ieemce.org/planning-basics/getting-started/conference-organizer-timeline/>

IMS Conferences useful links:

- About Conferences, Resources, Committee:
<https://ieee-ims.org/about/conferences>
- Upcoming Financially Sponsored Conferences:
<https://ieee-ims.org/events/sponsored-conferences>
- Upcoming Technical Co-Sponsored Conferences:
<https://ieee-ims.org/general/technically-co-sponsored-conferences>

1. CATEGORIES OF SUPPORT

The IMS involvement can provide three different levels of support: **Technical**, **Financial**, and **Sole**, as outlined in the following Sections 1.1, 1.2, and 1.3. For general IEEE definitions and policies, please refer to:

<https://ieeemce.org/planning-basics/getting-started/obtaining-sponsorship/>

and

<https://www.ieee.org/content/dam/ieee-org/ieee/web/org/about/corporate/ieee-policies.pdf#page=76>

1.1. Technical Co-Sponsorship

Technical Co-Sponsorship is available for events financially sponsored by Non-profit Organizations, typically these are other IEEE conferences, etc. Technical Co-Sponsorship requires direct and substantial involvement by the IMS in the organization of the Conference technical program. **Technically Co-Sponsored Events must include at least two IMS members in the technical committees in order to contribute in managing the Call for Paper, the technical program and the review process.** In addition, the IEEE IMS logo must be included in all event publications and announcements.

The relationship between sponsoring organizations must be explicitly defined in a Memorandum of Understanding (MoU). This MoU will be circulated by a representative at the IEEE Headquarters to collect the appropriate signatures (e.g., typically electronic signatures). In particular, this is the *IEEE Meetings, Conferences, and Events* (MCE) group, 445 Hoes Lane, Piscataway, NJ 08854 USA, Email: ieee-mce@ieee.org, Phone: +1 855 340 4333 (Toll-free US & Canada) and +1 732 562 3878 (Worldwide).

1.1.1. Benefits

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

- Be included in the IEEE Conference Search tool: <https://www.ieee.org/conferences/index.html>
- Be encouraged and supported to participate in the IEEE Conference Publications Program (CPP): the primary objective of the CPP is to include the Conference papers in IEEE Xplore® for the widest dissemination within the technical community.
- Be listed in the IMS website.
- Use IMS and IEEE logos to attract qualified attendees.
- Be promoted through IMS Newsletter.
- Be prompted through IEEE IMS Conference Newsletter.
- Be listed in the IEEE IMS Magazine pages.

Other benefits can be specified in the MoU.

1.1.2. Obligations

The Conference Organizers will:

- Reduce registration rate for IEEE members.

- Include IMS members in the technical committee and comply basic requirements of the review process.
- Commit to gender-diversified panels, keynote speakers, tutorial organizers and are encouraged to appoint a Diversity Chair.
- Be available to distribute IMS items (e.g., other Call for papers) to the Conference attendees.
- Be available to promote IEEE and IMS activities, student participation, and events that target under-represented audiences.
- Be available to provide information to IMS about the Conference (see Schedules, ADDENDUM section).
- Use English as the Conference official language, including for writing, presenting, and discussing papers.

Other requirements can be specified in the MoU.

1.2. Financial Co-Sponsorship

Financial Co-Sponsorship indicates a financial shared involvement between the IMS and other entities, along with a shared and significant involvement in the technical and administrative aspects of the conference. **Financially Co-Sponsored Events must include at least two IMS members in the technical committees in order to contribute in managing the Call for Paper, the technical program and the review process.** Other co-sponsors could be IEEE Organizational Unit(s) (societies, sections, chapters, etc.) and/or other Non-profit non-IEEE organizations. The relationship between sponsoring organizations must be explicitly defined in a Memorandum of Understanding (MoU).

Financial Co-Sponsored Conferences must include the IEEE IMS logo in all their publications and announcements. The term “IEEE” shall be used in the names of Co-Sponsored Conferences where IEEE is at least a 50% financial sponsor (in total for all IEEE co-sponsors).

All IMS financially sponsored and co-sponsored conferences should be held with in-person participation only.

Force Majeure: Different participation formats can be considered at the discretion of the conference organizers and in agreement with the VP Conferences based on regional or global exceptions caused by circumstances beyond the reasonable control that restrict in-person participation.

1.2.1. Benefits

- Be included in the IEEE Conference Search tool: <https://www.ieee.org/conferences/index.html>
- Be encouraged and supported to participate in the IEEE Conference Publications Program (CPP): the primary objective of the CPP is to include the Conference papers in IEEE Xplore® for the widest dissemination within the technical community.
- Be listed in the IMS website.
- Use IMS and IEEE logos to attract qualified attendees.
- Be promoted through IMS Newsletter.
- Be prompted through IEEE IMS Conference Newsletter.
- Be promoted in the IEEE IMS Magazine.
- No fees are due to IMS for paper submission to IEEE Xplore®.
- IMS knowledge and experience in budget control according to IEEE policies.

- Distinguished advertising on IMS website and in the IMS magazine.

Other benefits can be specified in the MoU.

1.2.2. Obligations

The Conference Organizers will:

- Reduce registration rate for IEEE members.
- Include IMS members in the technical committee and comply basic requirements of the review process.
- Commit to gender-diversified panels, keynote speakers, tutorial organizers and are encouraged to appoint a Diversity Chair.
- Be available to distribute IMS items (e.g., other Call for papers) to the Conference attendees.
- Be available to promote IEEE and IMS activities, student participation, and events that target under-represented audiences.
- Be available to provide information to IMS about the Conference.
- Plan a budget with an expected surplus of at least 20% of the expected expenses. The budget must be approved by the IEEE IMS Vice President for Conferences prior to the financial co-sponsorship approval.
- Be available to provide detailed information regarding the venue layout, room accommodations and other facilities.
- Organize monthly status meetings among Chairs, starting from at least eight months in advance to the Conference date. The minutes of the meeting shall be provided to IMS.
- Use English as the Conference official language, including for writing, presenting, and discussing papers.

Other requirements can be specified in the MoU.

1.3. Sole Sponsorship

Sole sponsorship approval indicates full and sole IMS involvement in the Conference, with IMS accepting complete responsibility for the technical, financial, and administrative aspects of the conference. **Solely sponsored Conferences are strongly encouraged to have a Board of Directors or Steering Committee to ensure the application of IMS guidelines and best practices.** The review process indicated in section 3.2.7 is mandatory.

The rules for the participation format of IMS sole sponsored conferences are the same as for financial co-sponsored conferences, and are defined in section 1.2

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

- The IEEE International Instrumentation and Measurement Technology Conference (I2MTC).
- Sensor Application Symposium (SAS).
- International Symposium on Medical Measurements and Applications (MeMeA).

- International IEEE Symposium on Precision Clock Synchronization for Measurement, Control and Communication (ISPCS).
- IEEE International Workshop on Applied Measurements for Power Systems (AMPS).

1.3.1. Obligations

The Conference Organizers shall not accept any sponsorship, advertisement, or special issue/section proposals from IMS competitors. Special Issue/section rules are further explained in section 3.1.4.1. IMS competitors are entities that offer products or services that compete with those of IMS, e.g., such competitors publish a journal that competes with IEEE Transactions on Instrumentation and measurement or organize a conference that competes with IEEE I2MTC.

2. TECHNICAL CO-SPONSORSHIP PROCESS

2.1. Step by Step Procedure

The procedure for achieving the Technical Co-Sponsorship is lined out in the Figure below and further described in the following subsections.

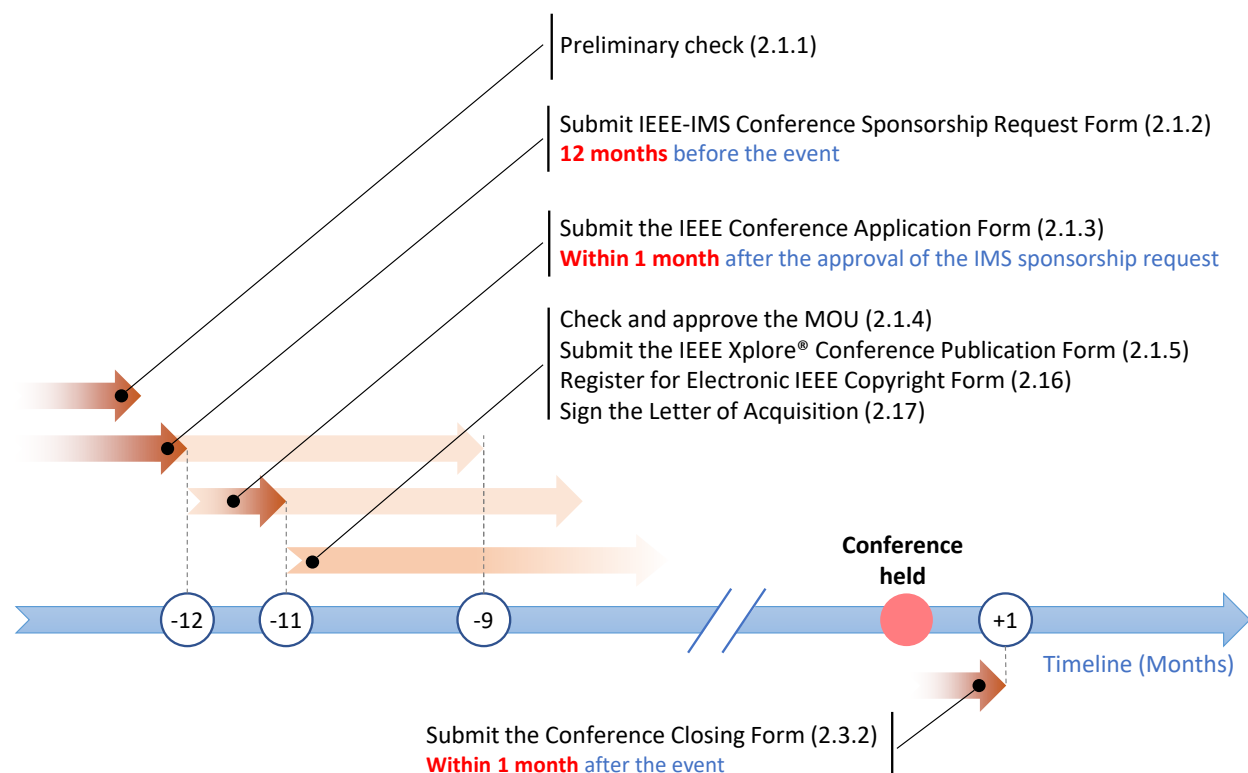


Figure 2.1. Timeline procedure for obtaining the Technical Co-Sponsorship

2.1.1. Preliminary check

Only non-profit organizations can obtain the IEEE technical or financial sponsorship.

- The conference must fall within the area of expertise and interest of IEEE IMS.
- Ensure that there are no other IMS sponsored events with the same topics, at the same time and/or in the same region. If there are, contact the Chairs to maximize synergy. See also the “Sponsored Conferences” section (<https://iee-ims.org/events/sponsored-conferences>) because many conferences repeat every year or every two years in the same period.

2.1.2. Submit the Conference Sponsorship Request Form

After preliminary checks, the conference organizer must submit the Conference Sponsorship Request Form 12 months in advance of the event (suggested, but no less than 9 months), available at:

<https://iee-ims.org/about/conferences#resources>

Also, include any relevant information:

- A draft Call for Papers.
- IMS Technical Committee involvement (note in the Conference Sponsorship Request Form).
- Samples of brochures, advertisements, or other pertinent material.
- Special requirements for the Memorandum of Understanding (MoU).

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

Note that IMS Vice President for Conferences will decline technical sponsorship if he/she has not received the correct and timely “Conference Sponsorship Request Form” of the event.

2.1.3. Submit the Conference Application Form

After receiving approval from the IMS Vice President for Conferences, proceed to complete the online Conference Application Form at:

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

The Conference application form should be submitted not later **one month** after the approval of the IMS Conference Sponsorship Request. This document establishes the name of the conference, the date and venue and the principal points of contact. No other planning and approvals can be initiated, including contract review and execution, until the online Conference Application Form is completed. Save a copy of the submitted form with the identification number assigned to the Conference, should it be necessary to contact VP Conferences regarding its approval.

IEEE Fee Policy (subject to change by IEEE without prior noticing):

- If the Conference does not request publication in IEEE Xplore®, a fee of \$1,450 is due to IEEE.
- If the Conference requests publication in IEEE Xplore®, a fee of \$1,450 plus \$22/paper sent to IEEE Xplore® is due to IEEE.

2.1.4. Check and approve the Memorandum of Understanding (MoU)

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

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

The MoU includes basic and technical information about the conference:

- The involved parties and the role of each party.
- The name of the event.
- The duration of the MoU and how the MoU can be terminated.
- Compliance with sponsoring entity's organization policies.
- Contact information of signing parties.
- Each sponsor's direct and substantial involvement in developing the technical program.
- The paper review process.
- Ownership of the conference name and other intellectual property (not including the Conference, Publication copyright).

- Whether this conference will be producing a Conference Publication.
- Ownership of the Conference Publication copyright.
- If the conference proceedings will be included in the IEEE Conference Publication Program (CPP), also requesting publication of conference proceedings in IEEE Xplore®.
- Assignment of conference management and other administrative responsibilities to the appropriate organizational unit.
- General Conference management accountabilities such as assignment of Chairs.
- If the conference has an associated exhibition.
- Guidelines for using the IEEE Master Brand.

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

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

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

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

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

The Conference Publication form should be filled out online immediately after the MoU is signed, and is available at:

<https://www.ieee.org/conferences/organizers/conference-pub-form.html>

The Conference Publication Form is your request for approval to submit your conference papers to the CPP and the IEEE Xplore® Digital Library. At this time, the Conference Chairs should determine how they want to handle Non-Presented Papers. For instance, will non-presented papers be pulled from submission to IEEE Xplore®. For more information about the handling of non-Presented papers, see Developing the Final Program, available at:

<https://ieemce.org/planning-basics/technical-program-development-quality/planning-the-technical-program/>

More detailed information can be found in the IEEE website Publishing Conference Papers at:

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

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

For technically Co-Sponsored Conferences, the organizers have the option of assigning ownership of the publications to IEEE or providing them on a non-exclusive basis. If IEEE is the copyright holder, ensure that the IEEE Copyright Form has been submitted with each paper to be published. The IEEE Copyright Form is available at:

<https://www.ieee.org/publications/rights/copyright-main.html>

The copyright form is also made available electronically through EDAS. Authors who are not authorized to sign a copyright transfer form, should download the paper version, fill it in, and ask an authorized person to sign it. If authors would like to post their papers electronically on any website, any ftp site, or any other electronic dissemination technique, they must include the IEEE Copyright notice on the initial screen displaying the IEEE- copyrighted material. Additional information is available at:

<https://www.ieee.org/publications/rights/author-posting-policy.html>

2.1.7. Sign the Letter of Acquisition

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

<https://ieeemce.org/planning-basics/ieee-conference-publications/getting-approval/>

2.2. Managing the Conference

Every Conference has its own scientific community and its own history. Technical co-sponsorship involves incorporating the guidelines and policies of IEEE and of IMS to the conference and, for this reason, **IMS members shall be present in the Conference Committee and the Technical Program Committee**. This section describes the guidelines to manage the Conference according to the IEEE and IMS policies.

2.2.1. The Call for Papers

The Call for Papers should clearly indicate:

- The venue and the dates of the event.
- The scope and the topics of the conference, to avoid papers out of scope
- The Sponsors.
- The type of submitted paper (e.g., extended abstract, full paper). Note: the IMS recommends full paper submission (typically 4-5 pages, max.6 pages).
- The deadlines for paper submission and the dates for notification and for registration
- The Conference Chair and relevant contact information

- Potential authors are encouraged to use the IEEE's conference paper template at <https://www.ieee.org/conferences/publishing/templates.html>

Other information can be reported in the Call for Papers or in the Author instructions on the website. The Call for Papers should not be misleading, for instance promising inclusion in IEEE Xplore® or indexing for accepted papers.

2.2.2. The Conference Website

The website should clearly report all relevant committees and detailed author instructions. The website must contain the following information:

- The complete name of the event, dates, and location.
- General and Technical Chairs.
- Name and logo of sponsors and of technical sponsors.
- Aim of the conference, topics of the conference, connected events (i.e., workshops, panels, technical tours, etc.).
- Type of submission allowed and important dates of submission, notification, and final paper. Characteristics of submission (i.e., extended abstract or full paper, typical and maximum length). IMS encourages full paper submission (typically 4-5 pages, max. 6 pages).
- The details of the review process, indicating major and/or minor revisions, and the final date of acceptance or rejection. The IMS strongly supports the full review process, in which the final published manuscript is peer reviewed.
- Rules for paper publication (accepted, covered by a proper registration) in the Conference Proceedings.
- Rules for paper submission to IEEE Xplore (e.g., accepted, covered by a proper registration, and presented at the Conference). Please be sure to clearly illustrate the policy about no-show papers.
- List awards with aim, amount, and due date for nominations.
- If applicable, to submit a technically extended version of the published paper, with new original content, to the IEEE Transactions on Instrumentation and Measurement.
- Registration fees, with reduced registration rate for IEEE and IEEE IMS members.
- Information on hotel accommodation, including room rates and contact information.

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

<https://ieeemce.org/planning-basics/audience-development-promotion/>

To send an announcement to the entire IMS membership, the Conference Organizers can use the IEEE Notice System at:

<http://www.ieee.org/organizations/vols/e-notice/>.

Once the notice is submitted, the IMS Vice President of Conferences will be contacted for approval.

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

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

2.2.3. Exhibits

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

2.2.4. Financial support from Industry, awards

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

2.2.5. Awards

Awards issued by a Conference typically include Best Paper Awards and Travel Awards. These awards are highly encouraged by IEEE IMS. Awards should be clearly described on the website with aim, requirements, amount, and date of communication. Industries and private societies should be encouraged to financially support the awards. An Award Committee should be assigned by a specific Committee or by the Program Chairs. Award assignment should prevent conflict of interest and should encourage equity between academia and industry and balance between the Regions.

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

Tutorials, special sessions and invited talks are encouraged by IEEE.

Tutorials shall fall within the scientific and technical areas of interest of the Conference, and it should be clearly shown on the conference website, including any fees associated.

The inclusion of Special Sessions (SS) should be clearly indicated on the website. Industrial tracks can also be organized accordingly. Potential SS organizers should contact Program Chairs and submit information (e.g., topic, motivation, chairs) for potential approval. SS should be clearly indicated on the website and in the EDAS submission system. SS Chairs should be included in the reviewer list. SS Chairs could be invited to present a talk about the SS topic at the beginning of the SS.

Poster sessions are commonly run in parallel with presented sessions. Paper selection and review is expected to be the same quality as general 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.

A work-in-progress session can be organized, even with different deadlines and rules for paper submission. IMS strongly recommends clear illustration, on the website or in other advertising tools, of the review process and the publication (e.g., Conference proceedings distributed during the Conference) and submission (e.g., submission to IEEE Xplore®) possibilities of all the types of submissions. Note that IMS strongly suggests the papers selected for work-in-progress sessions can be submitted to IEEE Xplore only if the papers have been processed through the same review procedures of regular papers.

Invited talks, as well as keynote speakers, are a good way to highlight the quality and relevance of the Conference.

It should be underlined that, IMS technical co-sponsorship suggests that every paper published in the Conference Proceedings shall accomplish basic requirements of the review process indicated in the following section (2.2.7.). Other documents (e.g., abstract, presentation, and so on) concerning tutorials, introductory remarks of SS, work-in-progress, posters, invited talks, can be distributed during the Conference together with Conference Proceedings.

2.2.7. The Review Process

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

IMS strongly suggests the full-paper review process, avoiding abstract and extended abstract.

The paper review process of the technically Co-Sponsored Conferences shall satisfy the following basic requirements:

- TPC members should come from different geographical areas.
- A minimum and a maximum length of submitted papers must be specified (e.g., typically 4-5 pages, maximum 6 pages, IEEE format); usually the required completeness of a technical paper implies a minimum length of 3-4 pages, IEEE format.
- Solutions for conflict of interest in reviewing papers by researchers involved in the Conference organization must be specified.
- Papers must fall within the scope of the Conference
- Papers must be screened for possible plagiarism. IMS strongly encourages the use of CrossCheck, available for free by IEEE.
- Papers must be peer-reviewed within the deadline by at least two reviewers. IMS strongly discourages the use of students as reviewers. Each reviewer scores over the following four assessment areas:
 - a. Relevance and timeliness: rate the importance and timeliness of the topic addressed in the paper within its area of research.

- b. Technical content and scientific rigor: rate the technical content of the paper (e.g.: completeness of the analysis or simulation study, thoroughness of the treatise, accuracy of the models, etc.), its soundness and scientific rigor.
- c. Novelty and originality: rate the novelty and originality of the ideas or results presented in the paper.
- d. Quality of presentation: rate the paper organization, the clearness of text and figures, the completeness and accuracy of references. Papers that are poorly or unintelligibly written should be rejected, as well as papers with poor organization, as paper that lack some or all of the basic elements commonly found in scientific research papers:



The official language of the Conference shall be English. All papers shall be written, presented, and discussed in English.

2.2.8. The Conference Proceedings

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

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

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

However, **the publication of the conference proceedings in IEEE Xplore® is not granted by the technical co- sponsorship.** It will be ensured only after a positive ex-post review of the paper quality performed under the responsibility of IEEE. If the overall content of the proceedings papers is considered below the IEEE standard of quality, they will not be included in IEEE Xplore®. See section about the Conference Publication form (2.1.5), Electronic IEEE Copyright Form (2.1.6), and the Letter of Acquisition (2.1.7) for more details. Ensure that papers are submitted according to the specifications addressed in Preparing Conference Content for the IEEE Xplore Digital Library, available at

<https://ieemce.org/planning-basics/ieee-conference-publications/submitting-proceedings-ieee-xplore/>

Guarantee adherence to guidelines and policies within IEEE Intellectual Property Rights, including use of copyright, Master Brand/Logo, and trademarks, available at:

<https://www.ieee.org/publications/rights/index.html>

2.3. Closing the Conference

The next two subsections outline IMS requirements for the conclusion of the conference.

2.3.1. Attendee Survey

IMS suggests to survey attendance satisfaction. A form can be distributed the last day of the event or electronically managed just after the conference to verify satisfaction of attendees.

2.3.2. Submit the Conference Closing Form

The Conference General Chair, supported by the Technical General Chair, shall compile and submit the Conference Closing Form (<https://ieee-ims.org/about/conferences#resources>), **not later than 30 days after the end of the Conference**, with the following information:

- The form requires a mean value of the similarity score of the papers, to summarize originality; this score can be easily computed by using CrossCheck, available for free by IEEE.
- The Technical Program Chairs shall assign a score to the overall scientific and technical quality of the papers in the Conference Proceedings with respect to other events in the same field of interest, also commenting on the improvement/decrease of quality of proceedings with respect to the previous editions, if applicable.
- The final version of the Call for paper is very appreciated for a more complete monitoring of the event, as well as the final technical program.

The timely availability and the approval of the Conference Sponsorship Request Form and of the Conference Closing Form are mandatory to receive the IMS sponsorship to the next edition.

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

3. FINANCIAL CO-SPONSORSHIP PROCESS

This section shows the guidelines for requesting the IMS financial co-sponsorship and for managing the financially co-sponsored event. More complete information can be found on the IEEE Website:

<https://ieeemce.org/planning-basics/>

In general, before financial co-sponsorship is granted, the IMS typically looks carefully at technically co-sponsored events to see if we can move to a deeper involvement and financially co-sponsor the event.

3.1. Sponsorship request

This section describes step-by-step procedures for the financial co-sponsorship request.

3.1.1. Preliminary Check

Only non-profit organizations can obtain the IEEE technical or financial sponsorship.

- The conference must fall within the area of expertise and interest of IEEE IMS
- Ensure that there are no other IMS sponsored events with the same topics, at the same time and/or in the same region. If there are, contact the Chairs to maximize synergy. See also the “past Sponsored Conferences” section (<https://ieee-ims.org/general/past-sponsored-events>), because many Conferences repeat every year or every two years in the same period.

3.1.2. Contact IMS Vice President for Conferences sending Conference Sponsorship Request Form

After preliminary checks in 3.1.1, the conference organizer must contact the IMS Vice President for Conferences and submit the Conference Sponsorship Request Form, **not later than 12 months before the event**, especially if the event is new to the IMS financial sponsorship process, because **the budget must be approved by the IMS AdCom**. The Conference Sponsorship Request Form is available at:

<https://ieee-ims.org/about/conferences#resources>

Be sure to include any relevant information:

- Draft Call for Papers.
- IMS Technical Committees involvement (note in the Conference Sponsorship Request Form).
- Samples of brochures, advertisements, or other pertinent material.
- Special requirements for the Memorandum of Outstanding (MoU).
- Brochures showing the venue layout, room accommodations and other facilities.
- The budget of the Conference. Please take in account that expected surplus should be not less than 20% of the expected expenses, according to IEEE policies (10.1.6 Conference Budgets, http://www.ieee.org/documents/ieee_policies.pdf).
- The financial split between sponsors.
- How sponsors will share any profit/loss.
- Assignment of administrative responsibilities.
- Who is responsible for indirect taxes, such as the Value Added Tax (VAT), when applicable.

The IMS Vice-President for Conferences will contact you for his/her preliminary opinion about the sponsorship. The budget form is available online at

https://www.ieee.org/content/dam/ieee-org/ieee/web/org/conferences/financial_reporting_tool.xls

Do not proceed further if you have not received the approval from IMS. Please consider that any budget modification requires the approval of the IMS.

3.1.3. Submit the budget

The budget previously approved by IMS Vice-President for Conferences must be entered online using the IEEE Conference Financial Reporting, available at

<https://www.ieee.org/conferences/organizers/conf-app.html?pageType=finance>

Every proposed conference is expected to follow its budget. IEEE policies recommend that all conference budgets submitted for approval should be set to generate a minimum surplus of 20% over projected expenses.

Any change to a previously approved budget, no matter how minor, must be submitted to the IMS Vice-President for Conferences and to the Treasurer for re-approval. The General Chair shall not transmit the original budget or any revisions to that budget directly to the IEEE. All budgets and subsequent revisions will only be transmitted to the IMS Vice-President for Conferences and to the Treasurer. According to IEEE policies Section 10.1.4, IEEE Conference Service approval is required if the Conference Budget exceeds \$25k in revenue/expenses and the budget must be submitted to IEEE Conference Service **at least one year in advance of the Conference.**

According to IEEE policies Section 10.1.10, conferences where IEEE has greater than a 50% financial responsibility, and where actual income or expense is \$250,000 or more, must be audited by a fully qualified, independent professional auditor.

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

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

3.1.4. Submit the Conference Application Form

After receiving approval from the IMS Vice President for Conferences, proceed to complete the online Conference Application Form at:

<https://www.ieee.org/conferences/organizers/conference-application-form.html>

This document establishes the name of the conference, the date and venue and the principal points of contact. No other planning and approvals can be initiated, including contract review and execution, until the online Conference Application Form is completed.

The Conference application form should be submitted not later than 12 months before the event. Send a copy of the submitted form and the ID number assigned to the Conference to the IMS Vice President for Conferences.

3.1.4.1 Special Issue

One conference Special Issue (SI), consisting of the extended versions of papers that have been accepted, registered, and presented at the conference, can be held in an IEEE journal or an IEEE magazine. If you plan to hold the SI in IEEE Transactions on Instrumentation and Measurement (IEEE TIM), please coordinate directly with the Editor-in-Chief of IEEE TIM. Otherwise, to publish your conference SI in another IEEE journal or IEEE magazine, you need to obtain explicit approval from the IMS Vice-President for Conferences.

Note that the SI cannot be published in a non-IEEE journal or non-IEEE magazine.

3.1.5. Check and approve the Memorandum of Understanding (MoU)

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

http://www.ieee.org/conferences_events/conferences/organizers/memorandum_of_understanding.htm

The MoU includes basic and technical information about the conference:

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

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

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

<https://ieeemce.org/wp-content/uploads/fiscal-agent-mou-template.docx>

Conference organizers can download and submit the Fiscal MoU to IEEE as required.

3.1.6. Submit the Conference Publication Form for submission to IEEE Xplore®

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

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

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

The Conference Publication form should be filled out online, at least 12 months before the Conference, and is available, at:

<https://www.ieee.org/conferences/organizers/conference-pub-form.html>

The Conference Publication Form is your request for approval to submit your conference papers to the CPP and the IEEE Xplore® Digital Library. At this time, the Conference Chairs should determine how they want to handle Non-Presented Papers. For instance, will non-presented papers be pulled from submission to IEEE Xplore®. For more information about the handling of non-Presented papers, see Developing the Final Program, available at

<https://ieeemce.org/planning-basics/technical-program-development-quality/planning-the-technical-program>

More detailed information can be found in the IEEE website Publishing Conference Papers at:

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

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

The IEEE Copyright Form must be submitted with each paper to be published and is available at:

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

The copyright form is also made available electronically through EDAS. Authors who are not authorized to sign a copyright transfer form, should download the paper version, fill it in, and ask an authorized person to sign it. If authors would like to post their papers electronically on any website, any ftp site, or any other

electronic dissemination technique, they must include the IEEE Copyright notice on the initial screen displaying the IEEE-copyrighted material. Additional information is available here:

<https://www.ieee.org/publications/rights/author-posting-policy.html>

3.1.8. Sign the Letter of Acquisition

The Letter of Acquisition (LoA), which is downloaded by the Conference Chairs after the Conference Publications Form is received and approved by IEEE Conference Operations, should be read and approved. The LoA provides the information needed to submit the conference proceeding to IEEE. The Technical Program Committee should ensure that authors receive proper instructions for final paper submission, ensuring a complete adherence to the requirements outlined in the Letter of Acquisition. Please note that The LoA does not guarantee that your conference technical papers will be published in IEEE Xplore.

IEEE can withhold publishing of conference proceedings that do not meet the IEEE quality standards. More details about LoA are available at:

<https://ieeemce.org/planning-basics/ieee-conference-publications/getting-approval/>

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

After approval of the MoU, the general chair or any other conference organizer making business or purchase decisions for a conference must complete the Principles of Business Conduct/Conflict of Interest (POBC/COI) form. The form can be completed and submitted online at:

<https://www.ieee.org/about/compliance/conflict-of-interest/coiandpob.html>

3.1.10. Establish the Conference bank account

A Conference must set up a banking account dedicated to the Conference. Both the General Chair and the Finance Chair must sign IEEE Concentration Banking forms, available at:

<https://www.ieee.org/membership/services/financial/treasury/concentration.html>

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

3.2. Managing the Conference

With financial co-sponsorship, IMS is heavily involved in all conference management functions through its designated Professional Conference Organizing company. IMS strongly suggests organizing monthly meetings among Chairs, beginning eight months in advance to the Conference date. These monthly meetings are necessary to ensure all planning duties are being executed on schedule. Meeting minutes should be taken for all conference calls and provided to IMS as requested.

3.2.1. The Call for Papers

The Call for Papers should clearly indicate:

- The venue and the dates of the event.
- The scope and the topics of the conference, to avoid papers out of scope.
- The Sponsors.
- The type of submitted paper (e.g., extended abstract, full paper). Note: the IMS recommends full paper submission (typically 4-5 pages, max.6 pages).
- The deadlines for paper submission and the dates for notification and for registration.
- The Conference Chair and relevant contact information.

Other information can be reported in the Call for Papers or in the Author instructions of the website. The Call for Papers should not be misleading, for instance promising inclusion in IEEE Xplore or indexing for accepted papers.

3.2.2. The budget

The budget should be continuously monitored. No later than six months before the Conference, a detailed description of the planned expenses shall be submitted to the Conference Committee. One month before the Conference and when the early registration date is expired, a thorough revision of the budget is required, especially for the “revenue” section. If the revised “revenue” section does not guarantee the 20% surplus with respect to the planned expenses, a revision of the expenses is needed. (Non-essential items, i.e., social functions can be reduced.)

3.2.3. The Conference Website

The website should clearly report all relevant Committees and detailed author instructions. The website must contain the following information:

- The complete name of the event, dates, and location.
- General and Technical Chairs.
- Name and logo of sponsors and of technical sponsors.
- Aim of the conference, topics of the conference, other connected events (i.e., workshops, panels, technical tours, etc.).
- Type of submission allowed and important dates of submission, notification, and final paper. Characteristics of submission (i.e., extended abstract or full paper, typical and maximum length). IMS encourages full paper submission (typically 4-5 pages, max.6 pages).
- The details of the review process, indicating major and/or minor revisions, and the final date of acceptance or rejection. The IMS strongly supports the full review process, in which the final published manuscript is peer reviewed.
- Rules for paper publication (accepted, covered by a proper registration) in the Conference Proceedings.
- Rules for paper submission to IEEE Xplore (e.g., accepted, covered by a proper registration, and presented at the Conference). Please be sure to clearly illustrate the policy about no-show papers.
- List awards with aim, amount, and due date for nominations.
- If applicable, to submit a technically extended version of the published paper, with new original content, to the IEEE Transactions on Instrumentation and Measurement.

- Registration fees, with reduced registration rate for IEEE members and IEEE IMS members.
- Information on hotel accommodation, including room rates and contact information.

Advertising is managed as a cooperation between the event and IEEE IMS. The Conference shall allow IEEE IMS to promote membership and events at the Conference. IEEE IMS promotes Conferences by including listings on its website (<http://iee-ims.org/>), links are also published on the IMS website (<http://iee-ims.org/conferences-list/upcoming>) for those Conferences that are Co-Sponsored or technically Co-Sponsored. Also, information about the Conference is provided in the I&M Magazine, IEEE IMS Newsletter and IEEE IMS Conference Newsletter. More information about promoting an IEEE Co-Sponsored event can be found at:

<https://ieemce.org/planning-basics/audience-development-promotion/>

To send an announcement to the entire IMS membership, the Conference Organizers can use the IEEE Notice System at:

<https://mga.ieee.org/resources-operations/volunteer-tools/ieee-enotice-service>

Once the notice is submitted, the IMS Vice President of Conferences will be contacted for approval.

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

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

3.2.4. Exhibits

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

3.2.5. Financial support from industries, awards

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

3.2.6. Tutorials, Special Sessions, and Invited Talks

Tutorials, special sessions and invited talks are encouraged by IEEE. Tutorials shall fall within the scientific and technical areas of interest of the Conference, and it should be clearly shown on the conference website, including any fees associated.

The inclusion of Special Sessions (SS) should be clearly indicated on the website. Industrial tracks can also be organized accordingly. Potential SS organizers should contact Program Chairs and submit information (e.g., topic, motivation, chairs) for potential approval. SS should be clearly indicated on the website and in the EDAS submission system. SS Chairs should be included in the reviewer list. SS Chairs could be invited to present a talk about the SS topic at the beginning of the SS.

Poster sessions are commonly run in parallel with presented sessions. Paper selection and review is expected to be the same quality as general 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.

A work-in-progress session can be organized, even with different deadlines and rules for paper submission. IMS strongly recommends clear illustration, on the website or in other advertising tools, of the review process and the publication (e.g., Conference proceedings distributed during the Conference) and submission (e.g., submission to IEEE Xplore) possibilities of all the types of submissions. Note that IMS strongly suggests the papers selected for work-in-progress sessions can be submitted to IEEE Xplore only if the papers have been processed through the same review procedures of regular papers.

Invited talks, as well as keynote speakers, are a good way to highlight the quality and relevance of the Conference.

It should be underlined that, IMS financial co-sponsorship suggests that every paper published in the Conference Proceedings shall accomplish basic requirements of the review process indicated in the following section “The review process” (3.2.7). Other documents (e.g., abstract, presentation, and so on) concerning tutorials, introductory remarks of SS, work-in-progress, posters, invited talks, can be distributed during the Conference together with Conference Proceedings.

3.2.7. The review process

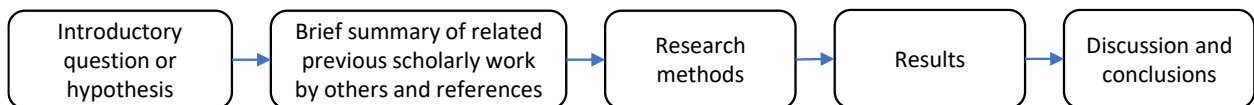
The IMS has a direct and substantial involvement in the development of the Technical Program of any financially Co-Sponsored Conference. Normally the review process is organized by the Technical Program Chair/Chairs and papers are reviewed by suitable members of the Technical Program Committee. These members are chosen to ensure high expertise in the topics of the papers and to avoid conflict of interest. See “Suggestion for Handling Paper Submission” in Appendix A.

IMS strongly suggests the full-paper review process, avoiding abstract and extended abstract.

The paper review process of the sponsored financially Co-Sponsored Conferences shall satisfy the following basic requirements:

- TPC members should come from different geographical areas.
- A minimum and a maximum length of submitted papers must be specified (e.g., typically 4-5 pages, maximum 6 pages, IEEE format); usually the required completeness of a technical paper implies a minimum length of 3-4 pages, IEEE format.

- Solutions for conflict of interest in reviewing papers by researchers involved in the Conference organization must be specified.
- Papers must fall within the scope of the Conference.
- Papers must be screened for possible plagiarism. IMS strongly encourages the use of CrossCheck, available for free by IEEE.
- Papers must be peer-reviewed within the deadline by at least two reviewers. IMS strongly discourages the use of students as reviewers. Each reviewer scores over the following four assessment areas:
 - a. Relevance and timeliness: rate the importance and timeliness of the topic addressed in the paper within its area of research.
 - b. Technical content and scientific rigor: rate the technical content of the paper (e.g.: completeness of the analysis or simulation study, thoroughness of the treatise, accuracy of the models, etc.), its soundness and scientific rigor.
 - c. Novelty and originality: rate the novelty and originality of the ideas or results presented in the paper.
 - d. Quality of presentation: rate the paper organization, the clearness of text and figures, the completeness and accuracy of references. Papers that are poorly or unintelligibly written should be rejected, as well as papers with poor organization, as paper that lack some or all of the basic elements commonly found in scientific research papers:



The official language of the Conference shall be English. All papers shall be written, presented, and discussed in English.

3.2.8. The Conference Proceedings

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

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

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

However, the publication of the conference proceedings in IEEE Xplore® is not granted by the financial co-sponsorship. It will be ensured only after a positive ex-post review of the paper quality performed under the responsibility of IEEE. If the overall content of the proceedings papers is considered below the IEEE standard of quality, they will not be included in IEEE Xplore®. See section about the Conference Publication form (3.1.6), Electronic IEEE Copyright Form (eCF) (3.1.7), and the Letter of Acquisition (3.1.8) for more details. Ensure that papers are submitted according to the specifications addressed in Preparing Conference Content for the IEEE Xplore Digital Library, available at:

<https://ieemce.org/planning-basics/ieee-conference-publications/submitting-proceedings-ieee-xplore/>

Guarantee adherence to guidelines and policies within IEEE Intellectual Property Rights, including use of copyright, Master Brand/Logo and trademarks, available at:

<https://www.ieee.org/publications/rights/index.html>

3.3. Closing the Conference

Financially Co-Sponsored conferences cannot be formally closed until a number of financial statements, forms and other documentation are submitted to the IEEE Conference Services. **Conference closeout must be done promptly to prevent penalties for late closure.** The IMS expects all required Conference closeout documentation be submitted to IEEE Conference Services **no later than 90 days** after the end of the Conference. The steps necessary to close out a conference are summarized in the following subsections and are listed on the Closing Conference Finances webpage at:

<https://ieemce.org/planning-basics/finance-contracts/closing-conference/>

where there is an appropriate link to all the needed schedules. The conference general chair should contact IEEE Conference Services directly for any questions relating to the conference closeout procedures.

3.3.1. Attendee Survey

IMS suggests survey attendance satisfaction. A form can be distributed the last day of the event or electronically managed just after the conference to verify satisfaction of attendees.

3.3.2. Send the Conference schedule resume to IMS Vice-President for Conferences

The Conference General Chair, supported by the Technical General Chair, shall compile and submit the Conference Closing Form (<https://ieee-ims.org/about/conferences#resources>), **not later than 30 days after the end of the Conference**, with the following information:

- The form requires a mean value of the similarity score of the papers, in order to summarize originality; this score can be easily computed by using CrossCheck, available for free by IEEE.
- The Technical Program Chairs shall assign a score to the overall scientific and technical quality of the papers in the Conference Proceedings with respect to other events in the same field of interest, also commenting the improvement/decrease of quality of proceedings with respect to the previous editions, if applicable.

- The final version of the Call for paper is very appreciated for a more complete monitoring of the event, as well as the final technical program.

The timely availability and the approval of the Conference Sponsorship Request Form and of the Conference Closing Form are mandatory to receive the IMS sponsorship to the next edition.

3.3.3. Repay any loans and distribute surplus

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

3.3.4. Close the bank account

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

3.3.5. Submit schedule of tax payment

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

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

Use the 1042 form to report any payments made to non-US people if your conference takes place in the US. Do not complete the 1042 form if your conference takes place outside the US. Both 1099 and 1042 forms are available at:

<https://ieeemce.org/wp-content/uploads/1099-1042-forms.xlsx>

3.3.6. Submit financial report

Prepare a final financial report using the IEEE Conference Financial Web form **no later than six months after the end of the conference**, available at:

<https://www.ieee.org/conferences/organizers/conf-app.html?pageType=finance>

Be sure to complete the Certificate of Accuracy (CoA), which is part of the financial Web form, available at:

http://www.ieee.org/documents/certification_of_accuracy.xls .

3.3.7. Audit (if applicable)

According to IEEE policies (Section 10.1.10), conferences where IEEE has greater than a 50% financial responsibility, and where actual income or expense is \$250,000 or more, must be audited by a fully qualified, independent professional auditor or by IEEE Internal Audit. More details are available at:

<https://ieeemce.org/planning-basics/finance-contracts/audit/>

4. SOLE SPONSORSHIP PROCESS

This section shows the guidelines for requesting the IMS sole sponsorship (see section 1.3 and subsections) and for managing the solely sponsored event. More thorough and complete information can be found on the IEEE Website:

<https://ieeemce.org/planning-basics/>

Note that normally IMS begins by technically co-sponsoring an event, in order to understand if there is an interest of IMS members to that scientific and technical community, and after a few years' sponsorship moves to a deeper involvement, financially co-sponsoring or solely sponsoring the event. Sole sponsorship is normally dedicated to those events where most of the scientific and technical community is composed of IMS members.

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

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

- Full-paper only submission (e.g., typically 4-5 pages, maximum 6 pages, IEEE format).
- Paper formatting according to PDF eXpress.
- Papers must be screened for possible plagiarism. IMS strongly encourages the use of CrossCheck, available for free by IEEE.
- Electronically managed submission process (e.g., EDAS).
- Timely notifications to authors of acceptance/rejection; possibility to timely ask for revisions Peer-review of the final manuscript, the paper included in the Conference Proceedings Final decision in charge to Program Chairs.

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

4.1. Student Travel Grants

For the Student Travel Grants of all IMS sole sponsored conferences, the following procedure must be used.

1. The award must be advertised through appropriate channels, including on the website of the conference. In the advertisement, the criteria for the award, including the fact that priority goes to IMS student members, and how to apply, must be clearly mentioned.
2. Students must apply for this grant. As such, an application mechanism, such as a checkbox during the submission process of the paper (or some other mechanism), must be made available.
3. Once the accepted papers are determined, a list of applicants must be constructed.
4. The applicants' list must first be ordered in terms of IMS membership, with IMS members at the top of the list.
5. While still complying with item 4 above, the conference organizers may give secondary, ternary,

and higher-level orderings in terms of additional parameters, such as financial need, travel cost, technical quality of the accepted paper, etc. These additional orderings MUST NOT disturb the membership ordering, i.e., at the end, all IMS members must still be on the top of the list.

6. Once the list is ready, grants must be allocated starting from the top of the list and move down the list until either the grant budget or the list itself is exhausted, whichever happens first.
7. The organizers must check that each winner is indeed a student. It is up to the organizers when this check should be performed, as long as it is done before the end of the conference.

5. Procedures for Changing the Guidelines

This document, IEEE I&M Society Conferences Management Guidelines, is reviewed annually by the Conference Committee. The general changes must be discussed and approved by the Conferences Committee by the end of October each year. If there are any changes that involve raising/lowering the fees charged by the Society to technically co-sponsored conferences, these must be agreed upon by the Conferences Committee and submitted to the AdCom for approval, unless the change is in reference to IEEE and/or IMS policies.

The approved changed document replaces the prior version and becomes effective January first of the following. The benefits and obligations of Approved Technical Events are the same unless the conditions for approval and/or signed MoUs are against IEEE Policies or must be changed as required by IEEE.

APPENDIX A: Suggestion for Handling Paper Submission

