



GUIDEBOOK FOR WORKSHOP/SYMPOSIUM ORGANIZATION

TABLE OF CONTENTS

PREAMBLE	2
PRIOR TO THE EVENT.....	2
About the event and location.....	2
Identification of the event’s location and date	2
Local Organizing Committee (LOC) definition.....	2
Estimated budget.....	2
Provisional schedule.....	2
Website development.....	2
About the Sponsoring procedure	3
Requirements	3
Types of sponsor	3
The sponsoring process step.....	3
About the Technical Program.....	5
Advertising.....	5
Call for papers.....	6
Accepted papers	6
About the Registration fees	6
DURING THE EVENT	7
About the promotion of IEEE OES	7
About the Technical Program.....	7
AFTER THE EVENT	8
About the presentation papers	8
About the financial closure.....	8
About the return on investment for OES	8
KEY DATES AND TIMELINES	9
APPENDIX A: ALL WHAT YOU NEED TO KNOW ABOUT ICX.....	12
APPENDIX B: INVITATION LETTER.....	21
APPENDIX C: SUBMITTING EXPANDED PAPERS TO THE IEEE J OCEANIC ENGINEERING.....	22
APPENDIX D: IEEE OES WORKSHOPS AND SYMPOSIA SURVEY	23
APPENDIX E: SESSION CHAIR INSTRUCTIONS TEMPLATE.....	25

PREAMBLE

The IEEE Oceanic Engineering Society sponsors a number of workshops and symposia each year and is looking for new workshop/symposium topics and individuals to organize them. For those interested in organizing an OES sponsored workshop/symposium, an outline of the requirements prior, during and after the event is presented here. Please contact the Vice-President for Workshops and Symposia (denoted VPWS) at vp-workshops-symposia@ieeooes.org if you have any questions regarding this document.

For small events organized by Chapters, Student Branch Chapters or Technology Committees without proceedings and financial commitments may not need to follow this procedure and may fall under the remit of Vice-President for Technical Activities denoted VPTA (vp-technical-activities@ieeooes.org). Please contact the VPTA and VPWS when in doubt whether your event should follow these guidelines or not.

PRIOR TO THE EVENT

Prospective workshops/symposia organizers need to be aware that there is a **substantial lead time** for the approval of financial (co-)sponsored OES workshops/symposia while some flexibility exists for technical co-sponsored events. Nonetheless, even for technical co-sponsored events it's advisable to contact VPWS as soon as enough details are available. See [About the sponsorship procedure](#) and KEY DATES and TIMELINE section for details on timing.

About the event and location

- ❖ Identification of the event's location, format (in-person, hybrid, online) and date

Make sure that there are no other related events (OES sponsored or other societies) a month before and after, where your potential attendees could participate (i.e. in the same field of interest). Check with the OES calendar available at <https://ieeooes.org/conferences/conference-calendar/> and contact VPWS well in advance (even before having all the details) with planned dates for better coordination and to avoid overlap of events.

- ❖ Local Organizing Committee (LOC) definition

Must comprise of at least the General Chair (must be an IEEE OES member in good standing), the Technical Chair, the Treasurer and a Conference Publication Chair. The Conference Publication Chair role can be accumulated with the Technical Chair role but it is advisable to have separate people fulfilling the two roles due to the workload required for each role. A single responsive Point of Contact should be identified for all communications with VPWS and the subject of emails should contain the name of the conference in brackets, e.g. [AUV 202x].

- ❖ Estimated budget

Three forecast budgets: best case, nominal (classically this one should show 20% of surplus) and worst case. A budget template can be found in <https://ieeemce.org/planning-basics/getting-started/budget/> (this Budget template may need to be modified to include virtual registration figures). While it is not mandatory to use this template for the proposal, all OES financial sponsored or co-sponsored need to use this budget template once the conference is approved.

- ❖ Provisional schedule

Definition of the important dates:

- Call for papers (approx. 8 months before the event),
- Submission deadline (approx. 5 months before the event),

- Notification of acceptance and opening of registrations (approx. 2-3 months before the event),
- Final manuscript deadline (approx. 1 month before the event).

Remark: It is possible to define two different fees for the registration (i.e., the early bird registration and the regular one). Generally, the beginning of the early bird registration corresponds to the notification of acceptance, while the beginning of the regular registration corresponds to the final manuscript deadline.

❖ Website development

The website shall be ready to be on-line for the call for papers (i.e. approx. 8 months before the event). The website can be hosted by the OES if desired (contact the VPWS). When developing the website, it is necessary to take into consideration the following points:

- Submission of abstracts/papers shall be done on-line,
- The payment of registration fees must be done using a secure payment site,
- It is unauthorized to add the IEEE OES logo on the website prior the acceptance of the OES sponsorship, but it is compulsory to add it once the sponsorship has been agreed.
- For workshops/symposia series, existing templates (when available) should be used.

Remark: OES has developed a suite of tools for abstract and paper submission and review, author notification and registration. The modules can be used by OES sponsored workshops/symposia for a fee, LOCs should contact VPWS for more information on this. LOCs are also allowed to employ their own means of setting up abstract/paper submission. If so, LOC should give an estimation of the cost in the budget and report feedback after the event.

About the Sponsoring procedure

❖ Requirements

Any prior workshops/symposia in the same series or by the same organizing chapter must be closed prior to the request for OES sponsorship of a new workshop/symposium. This is an absolute IEEE and OES requirement, so that workshops/symposia are closed timely and not to interfere with the following edition.

❖ Types of sponsorship

In general, Workshop/Symposium can have financial and technical sponsors.

- Financial sponsors have financial responsibility for the conference, including bank accounts, contracts, deficits, surplus, and other financial obligations.
- Technical sponsors do not have financial responsibility¹ (see *Note). They actively participate in the workshop/symposium technical program committee but accept no financial or legal liability for the workshop/symposium.

Depending on whether the IEEE organizational unit (OU) has financial or technical sponsorship, you can have three types of sponsorship as per IEEE Policy 10.1.2:

- Sole sponsorship (only IEEE OES financially sponsors the event)
- Co-sponsorship (IEEE OES plus other(s) organization(s), e.g. OES Chapter, other Societies, etc sponsoring financially the event)
- Technical co-sponsorship (IEEE OES plus other(s) organization(s), OES has zero financial responsibility).

¹ **Note: IEEE technically co-sponsored events will be charged Technical Co-Sponsorship Fees: a base fee of \$1450 plus \$22 per paper sent to IEEE Xplore®. This fee will be typically charged to the event although the IEEE Organizational Unit (OU), e.g. OES, IEEE Chapter, OES Chapter can decide to support it.*

❖ The sponsoring process steps

- ***A request to the OES for approval to conduct an OES sponsored workshop or symposium must be submitted to the VPWS. This request shall be submitted to VPWS at latest 6 weeks before spring/summer AdCom (if in-person) or by March (for online AdCom) the year before the workshop if the sponsorship implies OES financial responsibilities to ensure proper inclusion of the workshop in OES budget. The exact dates will be announced at the beginning of every year depending on the exact planning for AdCom. If you have any doubt about the answers to the following questions, do not hesitate to send an email to the VPWS. The following link can help to prepare your proposal <https://ieeemce.org/planning-basics/getting-started/>. In addition, the IEEE Center for Leadership Excellence website includes a Conference Education Program with learning materials for various conference organization roles and topics. <https://ieee.learningpool.com/totara/dashboard/index.php?id=5> The request must include:***

- ✓ *Name of the workshop/symposium*
- ✓ *Date the workshop/symposium will be held*
- ✓ *Location and format of the workshop/symposium (online, hybrid, in-person)*
- ✓ *List of workshop/symposium committee members (LOC), their workshop/symposium job and contact information*
- ✓ *Number of attendees expected*
- ✓ *Number of presentations expected (oral and/or poster)*
- ✓ *Method used to select presentations:*
 - *Review of submitted abstracts/papers*
 - *Other (please specify)*
- ✓ *Will papers be generated by this workshop/symposium?*
 - *If Yes: will they be loaded in IEEE Xplore®?*²
 - *If Yes: will any of the papers be expanded to full length articles suitable for publication in IEEE JOE (Journal of Oceanic Engineering)?*
- ✓ *What tools will be used for abstract and paper submission, registration and secure payment of fees?*
- ✓ *Benefits to the OES for sponsoring this workshop/symposium*
- ✓ *Will there be an exhibition (estimated number of booths)?*
- ✓ *Will there be some tutorials?*
- ✓ *Will an IEEE OES booth be required for this event?*
- ✓ *Will the OES be the sole sponsor of this event?*
- ✓ *Estimated budget (best case, nominal and worst case)*
- ✓ *Type of sponsorship requested of the OES:*
 - *Technical: as previously specified a fee sent to IEEE Xplore® will be charged; the OES AdCom (Administrative Committee) will determine, on a case by case basis, how these costs will be shared by the workshop/symposium and the OES*
 - *Financial*
- ✓ *Type and amount of funding requested from the OES if financial sponsorship is desired:*
 - *Seed money (or loan): money is returned to the OES at the conclusion of the event*
 - *Grant: money is not returned to the OES at the conclusion of the event*
 - *Student attendance*
 - *Other (please specify)*

² Note: please be aware that Xplore publication of proceedings requires the payment of the corresponding TCS fees defined in the previous note.

- *The VPWS will present a motion to conduct the requested workshop/symposium to the AdCom. In order to prepare the motion, the request must be received in a timely manner as mentioned above if the motion implies OES financial commitments. For technical co-sponsorships, the request can be sent at a later stage but no later than 4 months before the call for papers is issued. See more on Key Dates and Timeline section.*
Note: AdCom meetings typically take place during OCEANS' conferences or exceptionally on-line every other month. It means two meetings per year; one during April to June (Asia-Pacific or Europe) and September to October (North America). Currently, due to COVID-19 restrictions, AdCom meetings take place online every two months and approval through electronic votes can be taken on motions to conduct workshops. The exact scheduling of AdCom meetings will be announced at the beginning of every year.
- *The VPWS will notify the Chair of the proposed workshop/symposium of the AdCom's decision.*
- *If AdCom approves the proposed workshop/symposium, the chair of the workshop/symposium or their designee must:*
 - ✓ *Within one month of the AdCom approval, complete and submit an IEEE Conference Application to the IEEE:*
 - *This form is often referred to as the ICX (see Appendix A for more details)*
 - *It is completed on-line at <https://www.ieee.org/conferences/organizers/conf-app.html>*
 - *Save a copy of this form for your records*
 - *Before submitting the form online, save it as PDF and send it to VPWS for review and help.*
 - *Contact the VPWS if you have any questions during the completion of this form or ieee-mce@ieee.org. For more info on IEEE Conference Application procedure, visit <https://ieeemce.org/organize-an-event>*
 - ✓ *The approval of a workshop/symposium by the IEEE, and its generation of a registration number for the event, triggers activation of additional forms that need to be completed ASAP. All of the following forms should be completed and submitted to the IEEE at least 8-9 months prior to the start of the workshop/symposium:*
 - *Complete and submit the IEEE Conference Publication Form. Keep a copy of the form and send a copy to the VPWS. The link is located at: http://www.ieee.org/conferences_events/conferences/organizers/conf_app.html?appName=Publication For more info on IEEE Conference Publications, visit <https://ieeemce.org/planning-basics/ieee-conference-publications/>*
 - *Upon review and approval of the Conference Publication Form, IEEE will send a Letter of Acquisition (LoA). The Letter of Acquisition (LoA) contains an agreement between the conference and IEEE that confirms a conference's intention to publish with the IEEE Conference Publication Program (CPP) and in IEEE Xplore®. The Conference Publication Chair (or equivalent) must approve the LoA for the content to be processed for posting to IEEE Xplore®. The Workshop/Symposium Chair and the Treasurer must each complete a Conflict of Interest Disclosure Statement. Keep a copy of the form and send a copy to the VPWS. The link is located at: <https://ieeemce.org/planning-basics/ieee-conference-application-business-essentials/pboc-coi-form/>*
 - *When there are two or more sponsors of a workshop/symposium a Memorandum of Understanding (MoU) containing the basic, technical and financial information about the workshop/symposium is automatically generated and sent to the workshop sponsors. The Workshop/Symposium Chair should follow*

- up with each sponsor to ensure that the forms have been completed.
- A Fiscal MoU (formerly Banking MoU) is required when conference related funds are held in an account where IEEE does not have access. Fiscal MoU's are **NOT** created automatically through the ICX. Completed forms should be sent to Conference-Finance@ieee.org and to the VPWS. The document and more information are available at: <https://ieeemce.org/planning-basics/finance-contracts/choose-bank-account/>
 - Complete the IEEE Conference Financial Reporting form. Send a copy to the OES Treasurer for review prior to submitting to the IEEE. This online form allows submission of the workshop/symposium budget, forecast and actual finance and compliance information to IEEE. Keep a copy of the form and send a copy to the VPWS. The link to the form is located at: <https://ieeemce.org/planning-basics/getting-started/budget/>
 - ✓ For each year that the workshop/symposium is active (i.e. held in year X but approved in year X-1) the Workshop/Symposium Treasurer or Chair must complete the 1099 and 1042 Schedule of Payments Worksheet and submit it to the IEEE. Keep a copy of the form and send a copy to Conference-Finance@ieee.org and to the VPWS. The spreadsheet is located at: <https://ieeemce.org/forms-and-templates/>

About the Technical Program

❖ Call for papers

The workshop/symposium chair and/or the Technical chair have to define whether the submission is done through a 2-page extended abstract, a short paper (4 pages plus bibliography) or through the full paper.

Remark: Note that past statistics have revealed that approximately 80% of the submissions happen on the day of the deadline. Also, deadline extension may be required in case adequate abstracts are not received by the deadline but make sure an extension does not impact the conference timeline (see KEY DATES AND TIMELINE).

❖ Review and Acceptance

- For IEEE guidelines on the organization of a workshop/symposium technical program please visit <https://ieeemce.org/planning-basics/technical-program-development-quality/> and https://www.ieee.org/content/dam/ieee-org/ieee/web/org/conferences/paper_acceptance_criteria.pdf for Recommended Practices to Ensure Technical Conference Content Quality.
- It is highly recommended to assign at least three reviewers per abstract. IEEE requires at least two completed reviews to make a decision. The Technical chair should approach the appropriate Technology Committees chairs to ask for reviewers.
Remark: When setting the level of acceptance, you must take into consideration that for some reasons (visa problems, author's institution budgetary problem, research work not as so relevant than described in the abstract, etc.), all of the accepted abstracts will not result in a full paper presented at the workshop/symposium.
- When a paper is submitted, the author must sign an IEEE Copyright form. This can be done electronically. To view the form and learn how to set up electronic submission, go to: https://www.ieee.org/publications_standards/publications/rights/copyrightmain.html
Moreover, the paper needs to be compliant with IEEE Xplore. This can be done by using

the IEEE PDF eXpress service. As conference organizer, you need to request this service by registering at this website <https://www.ieee.org/conferences/organizers/conf-app.html>. Then, authors will need to use this service to generate a Xplore-compliant file and this is the final camera-ready version to be uploaded. For more details, visit this website. <https://www.ieee.org/conferences/publishing/pdfexpress.html>

Remark: Ensure that you have received a signed IEEE Copyright Form from all authors with accepted papers and that all papers are Xplore-compliant. If an author did not provide you with an IEEE Copyright Form or with an Xplore-compliant PDF, they run the risk of not being published in the conference proceedings or in IEEE Xplore.

- It is highly recommended to ask for the registration fee before the uploading process of the final paper (this will not ensure the presence of all the accepted papers' authors but will reduce the number of no-show papers). The registration system should allow to link the paper/abstract number to a given registration at registration time.
- Depending on the workshop/symposium location and on the attendees' nationality, you may be asked to produce some invitation letters (visa procedure – see Appendix B for an example).

❖ Plagiarism check

- All papers final versions should go through plagiarism checks. For more details on what constitutes plagiarism, check <https://www.ieee.org/publications/rights/plagiarism/id-plagiarism.html>. It is the responsibility of the Conference Publication Chair (or equivalent) to perform plagiarism check. Two tools are available to check for plagiarism violations: the Prohibited Authors List (PAL) database and the CrossCheck Portal. The first contains a list of authors who have been prohibited from publishing with any or all IEEE publications. The second checks for plagiarism and multiple submissions. Both are located on <https://crosscheck.ieee.org/crosscheck/> and the Conference Publication Chair (or equivalent) will be granted access upon registration on the following website <https://www.ieee.org/publications/rights/cross-check-portal.html> For more information and courses on CrossCheck usage please check <https://ieeemce.org/planning-basics/ieee-conference-publications/preparing-papers-checking-plagiarism/>

About the Registration fees

Depending on the attendee's status and on the existence of an early bird registration, some discounts can be applied to the registration fees. The following table applies to online and in-person events. Registration fees for the virtual component of a hybrid event shall be discussed with VPWS in an ad-hoc basis and shall reflect the conference experience provided to online attendees.

	Regular	Early bird
Non-IEEE member	100%	90%
IEEE member	90%	75%
Student	40%	35%
Life member	40%	35%

About the promotion of the event

Many workshops have failed to perform as well as they could because of sparse or ill-timed communications. It is a good idea to plan what announcements will be made to whom, when and by what channels are available. Know what other meetings you may be competing with for time or registrations. Time your communications accordingly. Be sure you discuss in advance with your Professional Conference Organizer (PCO) your communication plan and communication needs as the PCO may be busy with other conferences. See below for the promotion responsibilities and ways of promoting your conference.

❖ Advertising

The workshop/symposium chair or their designee is responsible for advertising the event. In particular, he/she is in charge of:

- *Obtaining the latest IEEE OES logo from the VPWS and using it on all advertising*
- *Designing flyers to the different stage of the workshop/symposium (i.e., Call for papers, Early Registration, General Registration, etc.) and send it to the Vice President Professional Activities (denoted VPPA) at vp-professional-activities@ieeoes.org for distribution at all OES sponsored events and all OES social media outlets.*
- *Giving all the necessary information to the VPWS for publicizing in the OES Beacon (published 4 times/year)*
- *Giving all the necessary information to the VPWS for publicizing in the OES calendar available on the OES website,*
- *Announcing in trade magazines (e.g. Sea Technology, Ocean News and Technology, Hydro International, Marine Technology Reporter, International Ocean News, etc.)*
- *Sending out email broadcasts drafts to the Secretary (secretary@ieeoes.org) to be sent through OES eNotice to all OES email list periodically about the conference details and cardinal dates.*
- *Partner with other societies/events when appropriate for cross-promotion through VPWS.*

DURING THE EVENT

About the promotion of IEEE OES

Depending on the size of the workshop/symposium, on its location and date, the OES might ask the workshop/symposium chair:

- ❖ To provide a fee-free emplacement for the OES booth, allowing to promote some OES events, but to recruit new OES members too
- ❖ To ensure the promotion of OCEANS conferences or OES sponsored workshops/symposia by the way of posters or flyers

About the technical program

Some authors will not come to present their paper. Such situations are known as ‘no-show’ papers. If these authors have not explained/justified their absence prior to the workshop/symposium, it is the task of the Technical Chair to ask for the reason of their non-attendance. If the reason appears to be unjustified, the corresponding paper cannot be included in the workshop/symposium proceedings and so will not be published in IEEE Xplore (if applicable). IEEE recommends adding the following sentence to the Call for Papers: “*IEEE reserves the right to exclude a paper from distribution after the conference, including IEEE Xplore® Digital Library, if the paper is not presented by the author at the conference.*” For virtual/hybrid events, depending on the platform used and the format of the event, authors shall be required to attend their sessions and answer Q&As when applicable and possible (given the platform/format) to not have their papers considered “no-show”. Pre-recorded video presentations only are not advisable.

Technical Program Committee members should acknowledge their willingness to serve before they are listed on the website. It is not acceptable to keep names on the Technical Program Committee from edition to edition without confirming their willingness to be part of it.

Selection of responsive and responsible session chairs is an essential and very important task of the Technical Program Chair. These should be identified among the Technical Program Committee and can be recruited as well from the Technical Committee related to the conference topic. Alternatively, presenting authors of papers within a given session can act as session chairs. Although calls for volunteers for session chairs may work, it is advisable to be pro-active, pick and directly contact the wished-for session chairs. Moreover, organizers of (special) technical sessions are expected to act as chairs as well. It is advised to have two co-chairs per session especially in the case that one (or both) co-chairs present papers within the session that they chair. It is important that session chairs are chosen well in advance and that proper instructions as well as their session papers are sent at least 2 weeks before the workshop start so that chairs have enough time to prepare. An example of session chair instructions is provided in Annex E. This template should be adapted to match the specific requirements of each workshop & symposia but serves as a guideline of the responsibilities of session chairs. Please make sure to provide precise indications to all chairs as instructions/sessions are run differently from conference to conference and session chairs may be inexperienced.

About the sustainability of the event

Conference organizers should follow the IEEE Event Sustainability Guide available on <https://ieeemce.org/planning-basics/ieee-event-sustainability-guide/>. This guide includes a checklist, a set of areas that organizers should focus and easy ideas to implement to make your event more sustainable. In addition, it includes a list of certified sustainable suppliers in cities around the world.

About Diversity, Equity and Inclusion

Diversity, Equity and Inclusion (DEI) principles should be applied in accordance with IEEE guidelines <https://www.ieee.org/about/diversity-index.html> These include the IEEE Event Conduct & Safety Statement for Conferences and the IEEE Nondiscrimination Policy available in the mentioned link.

AFTER THE EVENT

About the presentation papers

- ❖ If applicable, submit all presentation papers (i.e. excluding no-show papers) to IEEE Xplore within 30 days of the end of the workshop/symposium. The Conference Publication Chair needs to use the IEEE Packing List Generator tool and follow the guidelines available at <https://ieeemce.org/planning-basics/ieee-conference-publications/submitting-proceedings-ieee-xplore/>
- ❖ If applicable (for Technical Co-sponsorships), pay the invoice to IEEE related to the Xplore fees (so-called Technical Co-Sponsorship or TCS fees). As of 2021, these fees amount to 1450\$ base fee + 22\$ per paper.
- ❖ If applicable, work with the IEEE Journal of Oceanic Engineering (JOE) Editor-In-Chief (joe-editor@ieeeco.org) to publish extended papers resulting from this workshop/symposium in JOE (special issue or regular one – see Appendix C).

About the financial closure

- ❖ If applicable, repay the loan money to IEEE through the conference portal (overseen by VPWS) within 30 days of the end of the workshop/symposium.
- ❖ At the conclusion of the workshop/symposium, the workshop/symposium Chair and Treasurer must complete the Certificate of Accuracy to close the workshop/symposium. The closure of the workshop/symposium should occur within one year of the conclusion of the event. Keep a copy of the form and send a copy to the VPWS. The link to this form is located at: <https://ieeemce.org/forms-and-templates/>
- ❖ IEEE requires that conferences exceeding a total revenue or expense amount of \$250,000 USD and an IEEE financial sponsorship greater than 50% are required to have an audit performed. Please note that IEEE may schedule an audit for conferences with lower revenue or expense than \$250,000 USD and IEEE financial sponsorship greater than 50%. For the same cap on revenue/expense and IEEE financial sponsorship less than 50%, IEEE recommends an audit. More details about the audit process can be found at <https://ieeemce.org/planning-basics/finance-contracts/audit/>

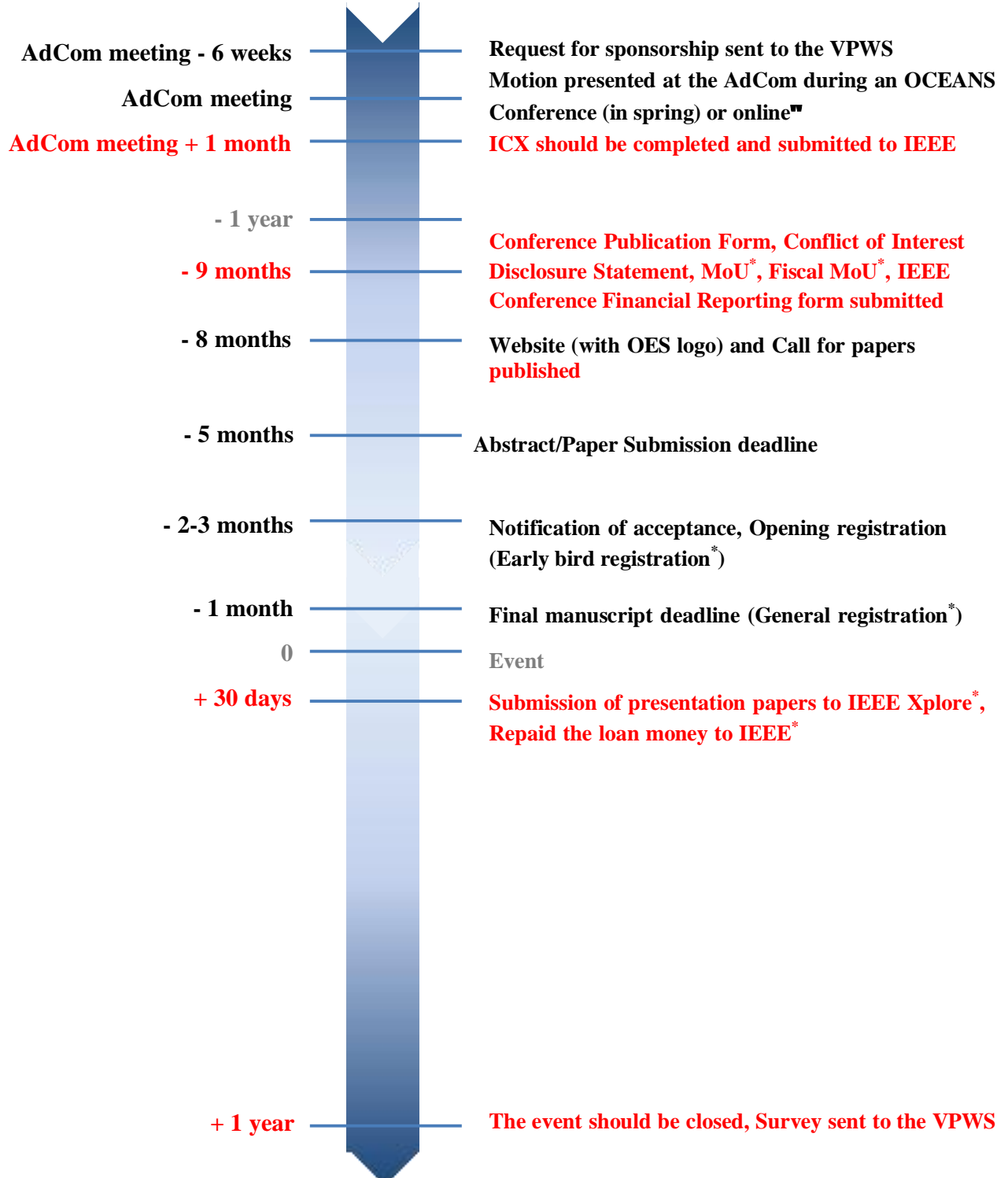
About the return on investment for OES

At the end of the workshop/symposium, you need to fill out the survey available on <https://ieee.surveyparrot.com/s/IEEE-OES-WORKSHOPS-AND-SYMPOSIA-SURVEY/tt-d53bef> (also available on Appendix D). If this survey is not filled out within one year of the end of the event (i.e. when the workshop/symposium is financially closed), OES will not approve sponsorship of a workshop/symposium conducted by the workshop/symposium chair of the defaulting event. This survey will help VPWS and OES keep track of the executed W&S and improve future OES W&S.

Moreover, all OES workshop/symposia are obliged to submit a short report to be included in the Beacon newsletter edition with the closest submission deadline after the event (March issue: 14 February, June issue: 14 May, September issue: 14 August, December issue: 14 November).

KEY DATES AND TIMELINES

You will find here a recall of the key dates and timelines presented in this document.



[™] Exact dates to be announced at the beginning of each year.

* If applicable

APPENDIX A: ALL WHAT YOU NEED TO KNOW ABOUT ICX

What's behind ICX?

IEEE Conference Exchange (ICX) is an online conference management platform that will provide a range of resources and tools to support and enhance IEEE Conferences.

With ICX, you can enter all of your workshop/symposium information at once, or save your entry and finish it later as more information becomes available.

Remark: You do not need an IEEE account to access ICX. If you choose to save a workshop/symposium before submitting it, sign in details will be sent to the individual identified as the workshop/symposium information submitter.

What is the ICX's URL?

The link to the actual ICX application is located at:

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

What is the required information for an ICX application?

- ❖ Workshop/symposium information submitter
 - Name, email, and phone number*
- ❖ General Information
 - Workshop/symposium name, acronym, and location/format (online, hybrid, in-person)*
 - Workshop/symposium Web site and Call for Paper's URL's*
 - Start and End dates for the workshop/symposium*
 - Keywords to be used for workshop/symposium searches*
 - Scope & field(s) of interest*
- ❖ Event details
 - Will a workshop/symposium publication be produced?*
 - Will IEEE own the copyright?*
 - Estimated attendance*
 - Will there be tutorials? Exhibits?*
 - Location of conference (venue name, address, contact information and phone number)*
- ❖ Sponsors
 - Name of Sponsor(s) – both IEEE and non-IEEE*
 - Financial details, sponsorship percentages, estimated revenue and expenses*
 - Roles and responsibilities of each sponsor(s)*
 - Conference committee details*
- ❖ Technical Program
 - Structure of technical program committee*
 - Number of reviewers*

APPENDIX A: ALL WHAT YOU NEED TO KNOW ABOUT ICX

Type of materials reviewed

Estimated number of papers and targeted acceptance rate

Use of student reviewers

❖ **List of Conference Contacts**

Name, email, phone, fax and address

Role in conference

❖ **Comments**

Other events or workshops associated with the conference?

If you have an existing conference MOU in place, use this space to inform IEEE staff.

Other comments?

What's you are going to see and fill?

IEEE.org | IEEE Xplore Digital Library | IEEE Standards | IEEE Spectrum | More Sites

Cart (0) | Create Account | Sign in

IEEE
Advancing Technology for Humanity

The world's largest professional association for the advancement of technology

About IEEE | Membership & Services | Societies & Communities | Publications & Standards | Conferences & Events | Education & Careers | Contact & Support | Sitemap

Search IEEE

Follow: [f](#) [t](#) [in](#) [+](#) Share: [↗](#)

Home > Conferences & Events > Organizers

IEEE Conference Application

The IEEE Conference Application lets you register your conference and request approval for an IEEE conference. It will take approximately 20-30 minutes to complete the application. Before you begin, have the following information available: conference title, dates, location, website URL, sponsorship, technical program plans, and conference contacts. If you do not have all the necessary information, you can save the application after step 3 and complete it later. An email with a temporary user ID and password will be sent to you.

If you need to make any changes, select the Back button. Do not use your browser Back button or you will exit the application and your changes will not be saved.

You cannot promote your conference as an IEEE conference until it is approved. After it is approved, your conference will be listed on the IEEE Conference Search and IEEE Call for Papers. If you have any questions, contact us at conference-services@ieee.org.

I want to

Start a new application:

Complete an application I started:

Find the status of a submitted application:

[Home](#) | [Sitemap](#) | [Contact & Support](#) | [Terms & Conditions](#) | [Nondiscrimination Policy](#) | [Feedback](#) | [Privacy & Opting Out of Cookies](#)

A non-profit organization, IEEE is the world's largest professional association for the advancement of technology.
© Copyright 2012 IEEE - All rights reserved. Use of this Web site signifies your agreement to the terms and conditions.

IEEE
Advancing Technology for Humanity

APPENDIX A: ALL WHAT YOU NEED TO KNOW ABOUT ICX

For questions or comments, please contact IEEE Meetings, Conferences & Events at ieee-mce@ieee.org.

Step 1: Submitter Information	Step 2: About the Event	Step 3: About the Location	Step 4: Conference Sponsors	Step 5: Technical Program	Step 6: Conference Contacts	Step 7: Comments
-------------------------------------	-------------------------------	----------------------------------	-----------------------------------	---------------------------------	-----------------------------------	---------------------

★ Step 1: Submitter Information

The submitter is the person completing this application. Enter your name, email and phone number. We will contact you with any questions about this submission. You can enter additional contacts, such as Conference Chair, Treasurer, and Information Contact later in the application.

Title:

Given name/First name:*

Middle name:

Last/Family/Surname:*

Suffix:

IEEE Member Number:

Email:*

Phone:

Include '+' and country code. Example: +1 XXX-XXX-XXXX.

APPENDIX A: ALL WHAT YOU NEED TO KNOW ABOUT ICX

IEEE.org | IEEE Xplore Digital Library | IEEE Standards | IEEE Spectrum | More Sites Cart (0) | Create Account | Sign in

IEEE
Advancing Technology for Humanity

The world's largest professional association for the advancement of technology

[About IEEE](#) |
 [Membership & Services](#) |
 [Societies & Communities](#) |
 [Publications & Standards](#) |
 [Conferences & Events](#) |
 [Education & Careers](#)
[Contact & Support](#) | [Sitemap](#)

Search IEEE: Follow: [f](#) [t](#) [in](#) [v](#) Share: [g](#)

Home > Conferences & Events > Organizers

Step 1: Submitter Information |
 Step 2: About the Event |
 Step 3: About the Location |
 Step 4: Conference Sponsors |
 Step 5: Technical Program |
 Step 6: Conference Contacts |
 Step 7: Comments

* Step 2: About the Event

Name and Scope:

When naming your conference the year must be included as the first item in the name, followed by IEEE, if applicable, and then by the specific conference name. The conference acronym should always be listed in parentheses as the final item after the conference name. For example: 2011 IEEE Radio and Wireless Symposium (RWS)

Conference name:*
(200 characters left)

Conference acronym:
(100 characters left)

Event type:

Conference URL:
(255 characters left)

Start date:* **End date:***

Keywords:*
(200 characters left)

IEEE uses the important words from the conference name, including the conference acronym as the keywords. Enter other keywords that would help people search for the conference. Separate each word or phrase by a comma.

Scope:*
(300 characters left)

Enter a short description of the scope of the conference. The scope may be an existing field of interest, a subset of that field, or a new technology

Field of interest:*

- Aerospace
- Bioengineering
- Communication, Networking & Broadcasting
- Components, Circuits, Devices & Systems
- Computing & Processing (Hardware/Software)
- Engineered Materials, Dielectrics & Plasmas
- Engineering Profession
- Fields, Waves & Electromagnetics

Press Ctrl + to select and move more than one item to the right column. Press Ctrl - to remove items.

Estimated attendance:*

Check here if there will be exhibits.

Check here if there will be tutorials.

Conference Location

Country:*

City:*

If this is a virtual conference, enter the location of the IEEE operations center.

[Home](#) |
 [Sitemap](#) |
 [Contact & Support](#) |
 [Terms & Conditions](#) |
 [Nondiscrimination Policy](#) |
 [Feedback](#) |
 [Privacy & Opting Out of Cookies](#)

A non-profit organization, IEEE is the world's largest professional association for the advancement of technology.
© Copyright 2012 IEEE - All rights reserved. Use of this Web site signifies your agreement to the terms and conditions.

IEEE
Advancing Technology for Humanity

APPENDIX A: ALL WHAT YOU NEED TO KNOW ABOUT ICX

♦ Step 3: About the Location

Enter the name and address for each separate venue used by the conference. The venue may be a conference center, hotel, university or some other location. You can add multiple venues for a conference. If you know the contact at the venue, select Add Contact to add their name and email address. You can add multiple contacts for each venue. Save the venue and contact information before leaving the page or your information will be lost. You can only view one venue at a time. Click on a venue name to see the venue details.

If the venue is not known, enter TBD (to be determined) in the Name, Address and other fields and select a state and Country/Region. You will be able to revise these later.

Venue

▼ *(New Venue)*

Venue details

Name:

Address 1:

Address 2:

Address 3:

Address 4:

Country/Region:*

City:

Zip/Postal code:

APPENDIX A: ALL WHAT YOU NEED TO KNOW ABOUT ICX

IEEE.org | IEEE Xplore Digital Library | IEEE Standards | IEEE Spectrum | More Sites Cart (0) | Create Account | Sign In

IEEE
Advancing Technology for Humanity
The world's largest professional association for the advancement of technology

[About IEEE](#) |
 [Membership & Services](#) |
 [Societies & Communities](#) |
 [Publications & Standards](#) |
 [Conferences & Events](#) |
 [Education & Careers](#) |
 [Contact & Support](#) |
 [Sitemap](#)

Search IEEE Follow: [f](#) [t](#) [in](#) [+](#) Share: [+](#)

Home > Conferences & Events > Organizers

Step 1: Submitter Information |
 Step 2: About the Event |
 Step 3: About the Location |
 Step 4: Conference Sponsors |
 Step 5: Technical Program |
 Step 6: Conference Contacts |
 Step 7: Comments

* Step 4: Conference Sponsors

Add all financial and technical sponsors. Financial sponsors have financial responsibility for the conference, including bank accounts, contracts and other financial obligations. Technical sponsors do not have financial involvement or responsibility. Do not add supporters and patrons. The sponsors you enter here will be listed on the Memorandum of Understanding (MOU).

Sponsor Information

Sponsor name:* Start typing the sponsor's name to find it in the list. Select the name in the list and choose Add Sponsor. If the name is not listed, type in a new name and then choose Add Sponsor. Type in the full name of the sponsor. Do not type in acronyms or abbreviations. Add all conference sponsors.

Financial share

IEEE Sponsor Financial Share* 0 % If an organization is a financial sponsor, enter the percent of financial share. If an organization is a technical sponsor and not a financial sponsor, enter 0%. The financial share of the sponsors must equal 100%.

Non IEEE Sponsor Name Financial Share* 0 %

Non-IEEE signatory name:* The signatory is the person authorized to enter into legal agreements for the conference.

Non-IEEE signatory email address:*

Financial share total (100%) 0.00 %

Who will own the conference name?

Conference Committee Responsibilities

Describe how each sponsor is directly and substantially involved in developing the Technical Program.* (1000 characters left)

List the sponsors that are represented on the Technical Program committee.* (1000 characters left)

Describe the role of each sponsor represented on the Technical Program Committee.* (1000 characters left)

Does the conference committee have full authority to operate the conference? Yes/No Yes No Select No if there is a steering committee or other group that has authority to make decisions.

Is the oversight committee made up of representatives from each sponsor? (1000 characters left)

Who appoints the conference committee chairs and other key members? (1000 characters left)

Who approves the conference budgets? (1000 characters left)

Who establishes registration fees? (1000 characters left)

Home | Sitemap | Contact & Support | Terms & Conditions | Nondiscrimination Policy | Feedback | Privacy & Opting Out of Cookies

A non-profit organization, IEEE is the world's largest professional association for the advancement of technology.
© Copyright 2012 IEEE - All rights reserved. Use of this Web site signifies your agreement to the Terms and conditions.

IEEE
Advancing Technology for Humanity

APPENDIX A: ALL WHAT YOU NEED TO KNOW ABOUT ICX

IEEE.org | IEEE Xplore Digital Library | IEEE Standards | IEEE Spectrum | More Sites Cart (0) | Create Account | Sign in

IEEE
Advancing Technology for Humanity
The world's largest professional association for the advancement of technology

[About IEEE](#) |
 [Membership & Services](#) |
 [Societies & Communities](#) |
 [Publications & Standards](#) |
 [Conferences & Events](#) |
 [Education & Careers](#) |
 [Contact & Support](#) | [Sitemap](#)

Search IEEE Follow: [f](#) [t](#) [in](#) [d](#) Share: [↗](#)

Home > Conferences & Events > Organizers

Step 1: Submitter Information |
 Step 2: About the Event |
 Step 3: About the Location |
 Step 4: Conference Sponsors |
 Step 5: Technical Program |
 Step 6: Conference Contacts |
 Step 7: Comments

*** Step 5: Technical Program**

The technical program information you provide here will be included on the Memorandum of Understanding (MOU).

Will this conference produce a conference publication? Yes/No*
 Yes No

Will IEEE own the copyright?*
 Yes No

Will you request publication of your conference proceedings in IEEE Xplore?*
 Yes No

What is the structure of the technical program committee?*

What materials are being reviewed?* (1000 characters left)

What type of review is being performed?*

What is the estimated number of submitted papers?*

What is your targeted acceptance rate for submitted papers?*

How many named reviewers will be associated with this conference?*

How many reviewers will review each paper?*

What criteria will be used by your reviewers to evaluate submissions?*

Are you using student reviewers? * (1000 characters left)
 Yes No

How will you use student reviewer? *

How will you ensure that all accepted papers will be presented? * (1000 characters left)

Call For Papers Website URL: (1000 characters left)

Abstract submission date: (100 characters left)

Notification of acceptance date:

Final paper submission date:

[Home](#) |
 [Sitemap](#) |
 [Contact & Support](#) |
 [Terms & Conditions](#) |
 [Nondiscrimination Policy](#) |
 [Feedback](#) |
 [Privacy & Opting Out of Cookies](#)

A non-profit organization, IEEE is the world's largest professional association for the advancement of technology.
 © Copyright 2012 IEEE - All rights reserved. Use of this Web site signifies your agreement to the terms and conditions.

IEEE
Advancing Technology for Humanity

APPENDIX A: ALL WHAT YOU NEED TO KNOW ABOUT ICX

IEEE.org | IEEE Xplore Digital Library | IEEE Standards | IEEE Spectrum | More Sites Cart (0) | Create Account | Sign in

IEEE
Advancing Technology for Humanity

The world's largest professional association for the advancement of technology

[About IEEE](#) | [Membership & Services](#) | [Societies & Communities](#) | [Publications & Standards](#) | [Conferences & Events](#) | [Education & Careers](#) [Contact & Support](#) | [Sitemap](#)

Search IEEE Follow: [f](#) [t](#) [in](#) [v](#) Share: [s](#)

Home > Conferences & Events > Organizers

Step 1: Submitter Information | Step 2: About the Event | Step 3: About the Location | **Step 4: Conference Sponsors** | Step 5: Technical Program | Step 6: Conference Contacts | Step 7: Comments

+ Step 6: Conference Contacts

You must submit a Conference Chair and an Information Contact for your conference. A contact can have more than one role and you can assign more than one contact to each role. For example, if you have two conference co-chairmen, select Conference Chairman for both contacts. Please save the current contact before adding a new contact.

Contact Information

+ (New Contact)

Contact Details

Same as submitter information?

Title:

Given/First name: *

Middle name:

Last/Family/Surname: *

Suffix:

Email: *

Phone: Include '+' and country code. Example +1 XXX-XXX-XXXX.

Fax: Include '+' and country code. Example +1 XXX-XXX-XXXX.

This Contact is the

- Conference Chair
- Conference Treasurer
- Information Contact
- Other
- Publication Chair
- Technical Program Chair

+ (New Address)

Address Details

Address type: *

Address Line 1: *

Address Line 2:

Address Line 3:

Address Line 4:

Country: *

City: *

Zip/Postal code: *

Committee List

Committee list:

You can upload a list of committee members in any file format. If you have changes, you can overwrite the list by uploading a new file with the same name.

Home | Sitemap | Contact & Support | Terms & Conditions | Nondiscrimination Policy | Feedback | Privacy & Opting Out of Cookies

A non-profit organization, IEEE is the world's largest professional association for the advancement of technology.
© Copyright 2012 IEEE - All rights reserved. Use of this Web site signifies your agreement to the terms and conditions.

IEEE
Advancing Technology for Humanity

Guide

APPENDIX A: ALL WHAT YOU NEED TO KNOW ABOUT ICX

For questions or comments, please contact IEEE Meetings, Conferences & Events at ieee-mce@ieee.org.

Step 1: Submitter Information	Step 2: About the Event	Step 3: About the Location	Step 4: Conference Sponsors	Step 5: Technical Program	Step 6: Conference Contacts	Step 7: Comments
-------------------------------------	-------------------------------	----------------------------------	-----------------------------------	---------------------------------	-----------------------------------	---------------------

♦ Step 7: Comments

Enter any comments or information that you would like to share with IEEE. Use this field to notify IEEE of other events you would like to have associated with this conference or event. Provide the event name, acronym and record number, if known. Associated events share the same budget, sponsors and sponsorship relationship and occur within the same time period. You need to submit a separate conference application for each associated event. Each event is reviewed and must be approved by IEEE before it can be associated with a conference.

You can preview your application by selecting the Preview button. If you need to make any changes, select the Back button. Do not use your browser back button or you will exit the application and your changes will not be saved. Once you select Submit, you will not be able to make any changes to your application.

After you choose Submit, we can start to review your conference application. We will contact you within 5 business days to let you know if we have any questions or need additional information. We will also let you know what you need to do next to register your conference. While you wait to hear from us, you can check the status of your application.

Comments

(1000 characters left)

Back

Save & Exit

Preview

Submit

APPENDIX B: INVITATION LETTER

You will find here an example of invitation letter to be sent to the attendee for the vis procedure.

Workshop/Symposium Letterhead (Logo, Name, Event's date)

[DATE: month day, year] *date on which the letter was written*

Name: [Attendee's name]
Gender: [Attendee's gender]
Passport Number: [Attendee's passport number]
Nationality: [Attendee's nationality]
Job Title: [Attendee's job title]
Affiliation: [Name of the company/industry/employer of the attendee]
Date of Arrival: [DATE: month day, year]
Date of Departure: [DATE: month day, year] } *corresponding to the event's start and end date*


To Whom It May Concern

We respectfully request that an appropriate visa to travel to [Workshop/symposium country] be granted to [Attendee's name], identified above, whom we have invited to attend [Worskshop/symposium name] in [Workshop/symposium town], [Workshop/symposium country], [Workshop/symposium date].

[Worskshop/symposium name] ([Worskshop/symposium URL]) is an international conference that brings together the key international scholars and practitioners in the field of [Worskshop/symposium field] to review the latest advances and share their expertise.

All attendees to this conference are responsible for their own travel and accommodation expenses. Should you need additional information, please contact the organizing committee of [Worskshop/symposium name] at: [Worskshop/symposium contact's email].

Sincerely,



[Worskshop/symposium Chair's name]
[Worskshop/symposium name] Chair
[Worskshop/symposium Chair's business adress]

APPENDIX C: SUBMITTING EXPANDED PAPERS TO THE IEEE J OCEANIC ENGINEERING

Authors of papers accepted for an OES sponsored workshop/symposium have the opportunity to develop journal manuscripts based on their workshop/symposium papers and submit such manuscripts for publication in the peer-reviewed IEEE Journal of Oceanic Engineering (JOE). There is no requirement for authors to take this option, it is offered to those authors who would like to have an expanded version of their conference/workshop paper published in a peer-reviewed journal.

First, it is essential to understand that manuscripts which are simply minor revisions of a workshop/symposium paper present a problem of excessive duplication of material in citable documents that are already available on IEEE Xplore as workshop/symposium proceedings. It is the JOE policy that such manuscripts are not suitable for publication in the Journal. The manuscript submitted to the IEEE Journal of Oceanic Engineering should represent a significant further development of the workshop/symposium paper. Examples of manuscript developments include, for instance, addition of referenced, historical and scholarly context; elaboration of materials and methods; presentation of additional results with a discussion of their significance and potential expansion in future work. For authors who want to seize this opportunity, a recommended length for the workshop/symposium contribution is a 4- to 6-page paper that highlights the main features of their research, to avoid substantial duplication of the presentation in the workshop/symposium paper and the manuscript to be submitted for consideration by the Journal.

Second, there is no deadline for the submission of the developed paper following the workshop/symposium. The reason is that the research presented at the conference by different authors is most likely at different stages of completion. Authors should follow their own pace in developing the research for publication in the Journal.

Detailed instructions for submitting manuscripts to the IEEE Journal of Oceanic Engineering are available on the Journal's website (<https://ieeoes.org/publications/ieee-journal-of-oceanic-engineering/>). To summarize the requirements for manuscripts that are developed from OES conference, workshop, and symposium papers:

- ❖ The authors' cover letter in submitting the manuscript must clearly state that the manuscript is an expanded/further developed version of a paper previously presented at a conference, workshop, or symposium (also explicitly naming the conference, workshop or symposium and its date).
- ❖ In accordance with IEEE principles of scholarly publication (http://www.ieee.org/publications_standards/publications/rights/author_originality.html) authors must cite their conference/workshop/symposium proceedings papers in all subsequently developed versions of these papers.
- ❖ All manuscripts submitted to the Journal that are deemed suitable for review undergo the same rigorous peer-review process. The decision to accept or reject a manuscript submitted to the Journal is based on the outcome of the reviews.
- ❖ 'In addition, it is highly recommended that all coauthors read their work critically.'

Note: Even if the workshop/symposium paper is not published on IEEE Xplore, the guideline that requires significant (about 75%) new material as compared to the workshop/symposium paper, still applies.

APPENDIX D: IEEE OES WORKSHOPS AND SYMPOSIA SURVEY



The survey below is available at <https://iee.surveyparrot.com/s/IEEE-OES-WORKSHOPS-AND-SYMPOSIA-SURVEY/tt-d53bef> and should be filled as soon as possible after the event.

ABOUT THE EVENT

Workshop/symposium/conference title:

Workshop/symposium/conference acronym:

Event type:

Contact Name:

Start date:

End date:

Was IEEE OES your sole sponsor?

Yes No

If No: Names of the sponsors:

Contribution (grant, loan) in USD of the other sponsors:

Was there an OES booth to promote IEEE OES Membership? Yes No

If Yes: Estimated number of new membership:

Estimated number of new student memberships:

Was it the first edition of this event? Yes No

If No: Edition number:

Do you plan to organize in the future a new edition of this event? Yes No

ABOUT THE LOCATION

Venue Name:

Suite/Country:

Was there an IEEE OES chapter in your section? Yes No

If No: Do you think that this event will help creating a new chapter?

Yes No

Was there an IEEE student chapter in your section? Yes No

If No: Do you think that this event will help having a student chapter? Yes No

ABOUT THE AUDIENCE

Number of attendees:

APPENDIX D: IEEE OES WORKSHOPS AND SYMPOSIA SURVEY

Number of IEEE OES members (without the student members):

Number of students:

Number of IEEE OES student members:

ABOUT THE PAPERS/TECHNICAL PROGRAM

Number of submissions:

Number of accepted papers:

Number of oral presentations:

Number of poster presentations:

Number of no-shows:

Did you request publication at your proceedings in IEEE Xplore? Yes No

Have you asked JOE for a special issue? Yes No

Were there tutorials? Yes No

If Yes: Number of tutorials:

ABOUT THE EXHIBIT

Was there an exhibit? Yes No

If Yes: Number of Booths/Exhibitors:

ABOUT THE BUDGET

What was the expense (in USD):

What was the income (in USD):

ABOUT THE IEEE OES LIAISON

Have you got some remarks helping us to improve the management of such events?

APPENDIX E: SESSION CHAIR INSTRUCTIONS TEMPLATE

Dear <name>

Session chairs are needed for each of the technical sessions at <conference name>. As a member of the technical program committee (*author on an accepted paper*), we would ask you to consider serving as a session chair for the session(s) <name of session(s), date and time>. Please email us at <conference email> with your name, affiliation and availability by <date>.

Confirmed session chairs will be given advance access to view technical session details, download and read papers to be presented, and make advance contact with presenting authors. Session chairs are responsible for introducing the session, manage questions coming from the audience and wrap-up the session. If a given paper has no questions from the audience, session chairs are expected to ask 1-2 questions so please read the papers in advance and prepare those.

The following information is provided to assist you in your preparations:

1) The Technical Sessions will be XX minutes long, with XX presentations per Session. Each author will have XX minutes to present their paper. This allows X minutes per Session for Session Chair introductions/wrap-ups, and additional audience questions. The Master Schedule will be available on XXX by accessing XXX.

2) (*in case of parallel sessions*) If there is a no-show, the order and timing of each paper presentation should not be changed. The empty slot should be filled with discussion time related to the session led by session chair until the time comes for the next presentation.

3) (*in case of parallel sessions*) Every attempt has been made to deconflict presentation topics but if you have a scheduling conflict please inform us and we will do our best to solve it.

4) (*if applicable*) Session chairs are responsible for filling the session short questionnaire with basic info such as name of session, presented papers and number of attendees per each presentation.

5) (*if applicable*) Session chairs should distribute and collect questionnaires to the attendees (*or highlight their existence in conference app*).

6) (*in case of reminder*) For those who have not already confirmed to act as Session Chairs, please let us know of your interest by XX.

Best regards,

XXX

Technical Program Chair