# CONFERENCE TIMELINE

**PRE - CONFERENCE** (START through 2 DAYS) — **HOLD CONFERENCE** — **POST - CONFERENCE** (1 WEEK through 5–6 MONTHS)

| START | 24+ MONTHS | 24–18 MONTHS (A) | 24–18 MONTHS (B) | 18–15 MONTHS | 15–12 MONTHS (A) | 15–12 MONTHS (B) | 12–9 MONTHS | 9–6 MONTHS | 6–4 MONTHS | 4–3 MONTHS | 2 MONTHS | 6–4 WEEKS | 2 DAYS | HOLD CONFERENCE | 1 WEEK | 3 WEEKS | 1 MONTH | 3 MONTHS | 4–5 MONTHS | 5–6 MONTHS |
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| Determine and apply for sponsorship from all applicable IEEE and/or non-IEEE organizational units (OU) | *Obtain Sponsorship* | *Register your conference submit Conference Application and approve MOU* | Contact IEEE Section where conference will be held. | Develop communications plan, marketing materials and conference website | Develop paper management process or identify system vendor | *Develop technical program, establish paper submission process and deadlines* | Create website for paper submissions. Work with paper management company, if applicable | Plan social activities and tour program, if applicable | Complete paper review process. Finalize technical program. Notify speakers. | Request weekly reports from hotels on room block | Review room block with hotel against attendance and contracts | Deadline for early registration | Confirm onsite logistics with venue | Onsite Registration | Submit Conference Proceedings/Content (Xplore CD and other media types) per LOA *(spans 1 Week – 1 Month)* | | | Distribute surplus | Prepare and submit all audit material to independent auditor. *Audit required for IEEE OU total is >50% and budgeted income or expenses > USD$250K* | |
| | Engage with IEEE MCE for conference education, guidance, services and tools. | **Submit conference committee list and initial budget forecast to Conference Business Operations** | *Submit Conference Publication Form to obtain Letter of Acquisition (LOA), IF publishing with IEEE* | Send request for proposal (RFP) to exhibit decorators and develop exhibitor prospectus, if applicable | Establish a Call For Papers (CFP) | Update conference website with page/link about CFP information | Obtain permission from related IEEE OUs to market to their members using e-Notice | Send out RFPs for ground transportation and finalize contract, if applicable | Create and post advance program on conference website | Order attendee giveaways, speaker gifts, and/or conference shirts | Send final program, advertising, publicity and registration reminders | Preliminary specifications to conference site. Order signage and recognition products | Set-up registration area, exhibit space, information booth, office area | Monitor Budget | Committee members submit final statistics and lessons learned to OU | Registration clean up: process refunds, receipts and balances due | Process outstanding bills | | *Close conference bank account; submit proof of account closure* | |
| | Contact IEEE Meetings, Conferences & Events (MCE) if you would like to be assigned a Conference Mentor. | Review IEEE Insurance coverage and determine if additional coverage is required | *Register for Electronic IEEE Copyright Form (eCF) if proceedings are acquired by IEEE* | Begin outreach to educational institutions, corporations, government and industry for support and patronage | Establish a Visa process for international attendees and post on the conference website | Meet with previous year's committee to discuss best practices | *Establish registration process and ensure registration service is Payment Card Industry (PCI) compliant* | Launch registration site | Determine preliminary exhibitor space assignments, if applicable | Solicit bids from proceedings production vendors based on accepted papers | Develop and finalize volunteer job functions and onsite needs. | *Submit Pre-Conference budget forecast* | | Monitor Daily Activities | | | *Repay all Loans* | *Submit final financial report with Certification of Accuracy (spans 3 Months – 5–6 Months)* | | |
| | | Review tax information to ensure IRS and international compliance VAT and GST | Register for PDF eXpress (optional) | Apply for grants for conference support | *Submit conference budget with written IEEE OU approval(s) for headquarter review* | *Establish conference bank account(s)* | | | | *Organize and prepare for production of conference publications per Letter of Acquisition (LOA)* | Complete paper review process. Finalize technical program. Notify speakers. | Ship final program to conference site | | Hold Post-Conference Wrap Up Meeting | | | | | *Submit Post-Conference forecast* | |
| | | Contract conference management company, if applicable | Site selection and contract review, if applicable | | *Submit Principles of Business Conduct Compliance Certificate and Conflict of Interest Disclosure Statement (POBC/COI) forms* | *Submit updated committee list* | | | | | | | | | | | | | | |
| | | | | | Promote CFP and exhibit prospectus at current year's conference, if applicable | Review and reconfirm hotel, meeting space and room block | | | | | | | | | | | | | | |

**Spanning items (bottom of pre-conference, across multiple time periods):**
- Request and obtain loan from OU, if needed
- *Initial, Pre-and Post Conference forecasts [Submit Pre- and Post- Conference forecasts by November 30th of each calendar year for accrual purposes.]*
- *1099 & 1042 Schedule of Payments [No later than January 10th of each year for all payments made in the previous calendar year.]*
- *Submit annual report on foreign bank accounts to IEEE Tax Dept. [No later than January 10th of each year for all payments made in the previous calendar year.]*
- *Secure W-8 and/or W-9 forms for tax reporting*

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*NOTE: This timeline is illustrative and for planning purposes only. Each conference plan and timing is unique.*

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**Color Key:**
- Financial Actions
- Technical Program Actions
- Conference Publications Actions
- *Boldfaced = Required*